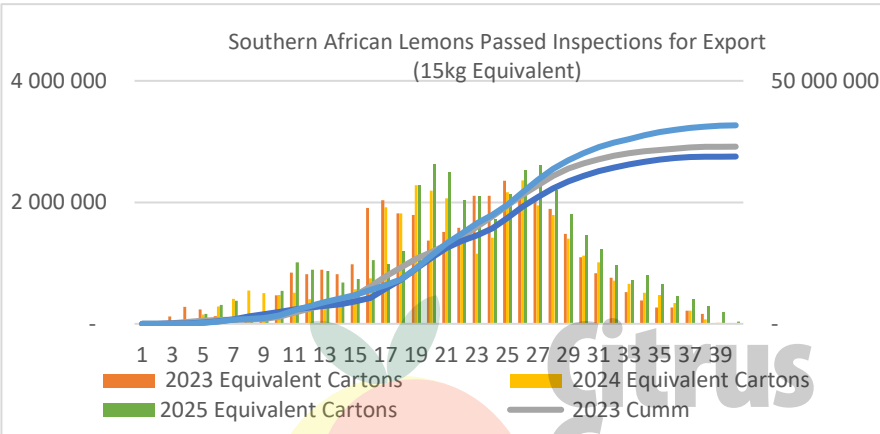


"Success is not a destination but a journey. It is fuelled by passion, determination and trust in yourself." – Unknown

2025 LEMON SEASONAL REVIEW: A GOOD SEASON

The 2025 lemon season concluded with a final packed volume of 41.5 million cartons, marking a year of notably high volumes in which markets held up well. The season began with expectations of a reduced crop due to adverse climatic conditions, including frost and hail across several key growing regions. The initial consolidated estimate in March was 32.9 million cartons.



The largest region, the Sundays River Valley, packed 17.1 million cartons, ending 30% above the estimate. Senwes, the second largest region, packed 6.2 million cartons (44% above estimate), Boland packed 3.7 million cartons (27% above), Patensie packed 3.5 million cartons (26% above), and Hoedspruit, at 2.8 million cartons, finished 8% above the estimate.

Projections were revised upwards throughout the season, driven mainly by fruit size improvement, and ultimately exceeding initial expectations, with peak counts at 113, 138, and 100. Picking and packing were delayed early in the season due to weather, but the second and third crop sets were strong, ranging between 2.0 and 2.6 million cartons weekly.

Young orchards continue contributing to increased production: 31% of total hectares are 6–10 years old, and 15% are 1–5 years old. This season also saw a 12% increase in the volume of processing grade fruit packed for export.

Europe remains the leading market for Southern African lemons, receiving 16.4 million cartons in 2025. Exports to the Middle East rose from 11 million cartons in 2024 to 12.8 million in 2025. Exports to Russia increased slightly from 2.7 million to 2.9 million. Shipments to Southeast Asia reached 2.4 million cartons, a significant increase from 1.3 million cartons in 2024. 2025 was a good year for lemons and we look forward to an even better 2026 season.

PACKED AND SHIPPED VOLUMES

End of Week 47 million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Vision 260
SOURCE: PPECB/AGRIHUB	2023	2024	2025	2024	2025	2025	2025	2024	2025
Grapefruit	14.2 m	14.4 m	15.3 m	14.1 m	15.0 m	15.3 m	15.3 m	14.4 m	16.8 m
Lemons	36.8 m	34.7 m	41.5 m	34.5 m	40.9 m	32.9 m	41.5 m	34.7 m	41.5 m
Mandarins	40.1 m	41.7 m	53.5 m	41.2 m	52.0 m	44.9 m	53.5 m	41.7 m	43.9 m
Navels	26.1 m	25.1 m	31.5 m	24.7 m	31.0 m	26.1 m	31.5 m	25.1 m	21.7 m
Valencia	53.6 m	48.7 m	61.9 m	48.2 m	59.8 m	52.0 m	61.9 m	48.7 m	58.0 m
Total	170.8 m	164.6 m	203.7 m	162.7 m	198.7 m	171.2 m	203.7 m	164.6 m	181.9 m

The table presents the volumes for Botswana, Eswatini, South Africa, and Zimbabwe.