

“Failure is the opportunity to begin again, this time more intelligently” Henry Ford

2022 SEASON REVIEW: LEMON

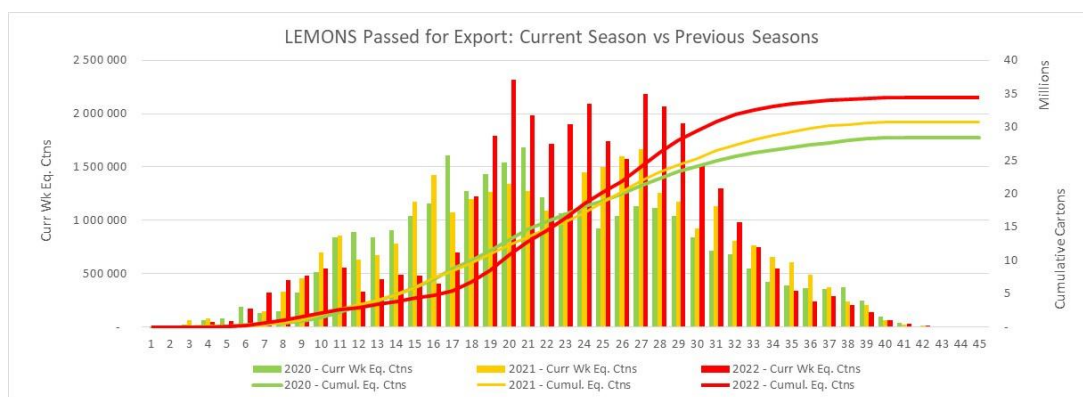
Packed lemon figures are presented below – all in 15 kg carton equivalents.

	Average 2017-21	2021	2022 (Estimate)	2022 (Actual)
Lemons	22.8 m	31 m	32.5 m	34.7 m

The Lemon Focus Group (LFG) underestimated the lemons packed figure by 7%. The impact of heavy lemon plantings over the past ten years is starting to show with the 2022 actual packed for export way ahead of the last five-year average, and 12% up on 2021.

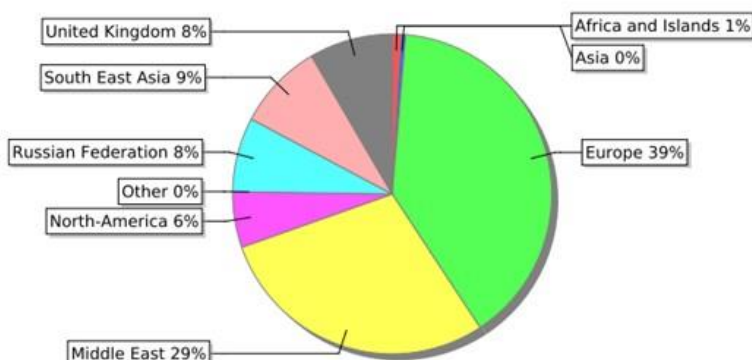
The impact of the strike in the Eastern Cape lemon growing regions, and the impact of the floods severing access to the Durban port for northern lemon growers is clear in the graph below, with early season packing falling well below the previous years, and then catch up for the balance of the season.

Sundays River is the largest lemon growing region with 42% of the total export volume, followed by Senwes with 19%.



The shipping distribution in 2022 was almost identical to that of 2021.

Current Season (2022) (YTD)



Europe continues to be the leading destination for southern African lemons with 39% in 2022 (2021 38%). Exports to Middle East have come down slightly – from 31% in 2021 to 29% in 2022. The new Chinese lemon protocol started to have an effect with exports to that region increasing from 7 to 9%. The other markets received the same percentage of fruit – even Russia where there had been concern about market access and shipping opportunities.

