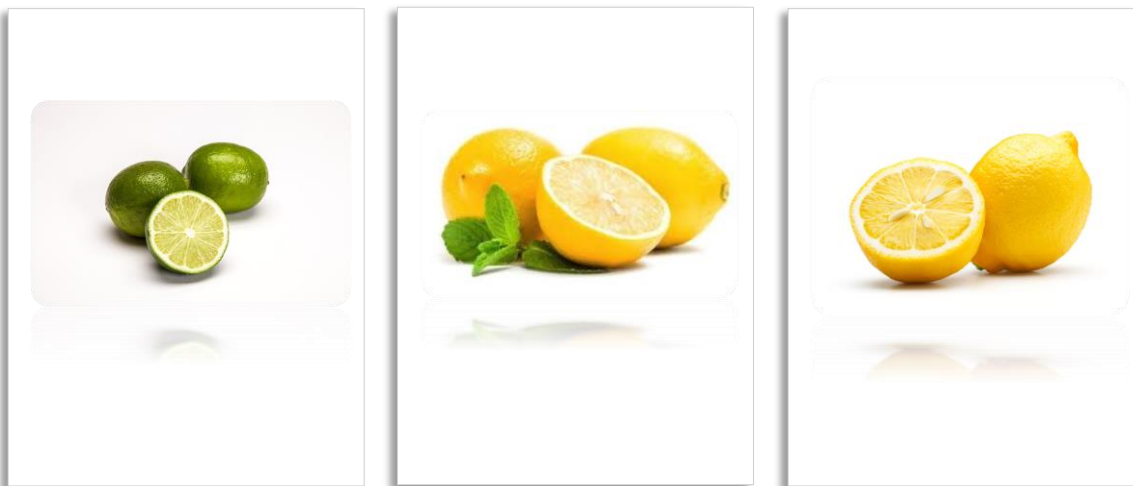


Product Focus

Fresh Lemons - HS Code 08055010



Lemon (scientific name: *Citrus limon*) is a sour citrus fruit which is used for both culinary and nonculinary purposes. Fresh lemons can be processed (mostly at origin) or marketed as a fresh fruit for consumers or professional users in the food service industry for drinks or food preparation.

The main purpose of fresh use is because of its flavour and all parts of the lemon can be used. Lemon juice is used for drinks while the lemon with zest or skin is used as garnish, in marmalades or deserts. Industrial processing of lemons has uses in the food and non-food segments (cleaning, cosmetics, pharmaceutical) and include for example (concentrated) juice, pulp, essential oil, pectin, citric acid, limonene and dehydrated peel.

A relatively large part of lemons is processed, but the fresh export trade is mostly destined for fresh use or direct consumption. This means your lemons must comply with quality requirements to enter the targeted markets.

COMMERCIAL VARIETIES

- i. **Eureka:** small variety, texturised skin, few seeds.
- ii. **Lisbon:** smooth skin, seedless.
- iii. **Primofiori / Fino:** Common in Spain, pale skin, popular variety for the lemon-processing industry •
- iv. **Verna:** Typical variety in Spain, thick peel, low in juice, 2-3 flowering seasons
- v. **Sorrento:** native to Italy with four annual harvests. High in lemon oils and traditionally used to make Limoncello.

OPPORTUNITIES

The global import of fresh lemons increased by 30% in the period 2015 to 2018 from US\$3.1 billion to US\$4.2 billion. The table below highlights major importers regionally and internationally.

International Markets		Regional Markets	
✓ USA	✓ Italy	✓ Mauritius	✓ Nigeria
✓ Germany	✓ Poland	✓ Mauritania	✓ Botswana
✓ Netherlands	✓ Canada	✓ Cabo Verde	✓ Côte d'Ivoire
✓ France	✓ Japan	✓ Angola	✓ Morocco
✓ Russia	✓ Saudi Arabia	✓ South Africa	✓ Zambia
✓ United Kingdom	✓ Spain	✓ Namibia	✓ Kenya

Source: ITC Trademap and ExportPotentialMap

USA, Germany and the Netherlands are the leading importing countries of fresh lemons.

MARKET ANALYSIS

According to UN COMTRADE - Trademap statistics, COMESA's exports of Fresh Lemons to the world increased by 114% over the past five years, US\$20 million in 2015 to US\$41 million in 2019. The major export markets for COMESA include Saudi Arabia, China, Hong Kong, Russia, Malaysia, UAE, Jordan, Kuwait, Canada and Australia, among others.

EXPORT POTENTIAL

In the past years COMESA countries who have been producing and exporting fresh lemons include:

Country	Potential & Existing Export Markets
1. Egypt	Saudi Arabia, China, Hong Kong, China, Russia, Malaysia, United Kingdom, Singapore, Canada, Netherlands, Australia, Mauritius, France, Greece, Macao, China, Cyprus.
2. Somalia	Saudi Arabia, Netherlands, Canada, United States of America, Germany, Sweden, Norway, United Kingdom, United Arab Emirates, Kuwait, Bahrain, Qatar, Oman, Germany, Norway, Morocco.
3. Eswatini	Saudi Arabia, Russia, UAE, Netherlands, Malaysia, Iraq, South Africa, Singapore, Viet Nam, China, Qatar, Romania, Oman, United Kingdom, Bahrain, Canada, Japan, Ukraine, Hong Kong, China
4. Tunisia	Italy, France, Romania, Libya, United Kingdom, France, Netherlands, Spain, Poland, Saudi Arabia, Russia, Turkey, Qatar, Croatia, Kuwait, United Arab Emirates, Canada, Germany.
5. Zimbabwe	South Africa, Russia, Saudi Arabia, Kuwait, United Arab Emirates, Qatar, Switzerland

Source: ITC Trademap and ExportPotentialMap

MARKET ENTRY

Certification and the need to fulfil both legal and non-legal requirements pose major obstacles to producers and exporters entering the market. As an exporter you depend a lot on the quality control of your buyer.

QUALITY

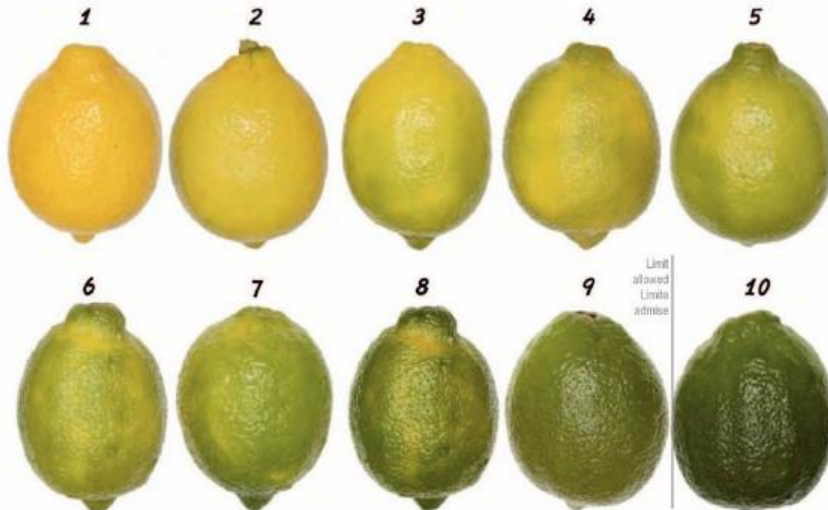
Fresh lemons, like other citrus fruit, should be at least:

- ✓ intact;
- ✓ free of bruising and extensive healed overcuts;
- ✓ sound – produce must be free from rotting or deterioration likely to make it unfit for consumption;
- ✓ clean, practically free of any visible foreign matter;
- ✓ practically free from pests free from damage caused by pests affecting the flesh;
- ✓ free from signs of shrivelling and dehydration;
- ✓ free from damage caused by low temperature or frost;
- ✓ free from abnormal external moisture; free from any foreign smell or taste;
- ✓ able to withstand transportation and handling and to arrive in satisfactory condition at destination.

For fresh consumption, Europe almost exclusively requires Class I lemons as a minimum. Lemons in this class must be of good quality and within the permissible tolerances:

- ✓ a slight defect in shape; slight defects in colouring, including slight sunburn;
- ✓ slight progressive skin defects, provided they do not affect the flesh;
- ✓ slight skin defects occurring during the formation of the fruit, such as silver scurf, russets or pest damage;
- ✓ slight healed defects due to mechanical causes, such as hail damage, rubbing, damage from handling;
- ✓ slight and partial detachment of the peel or rind for all fruit of the mandarin group;
- ✓ a tolerance of 10% is allowed for fruit that meets Class II standard;
- ✓ a tolerance of 10%, by number or weight, of lemons not satisfying the sizing requirements is allowed.

Examples of lemon grading according to external colour



Lemons Citrons	Extra Class Cat. «Extra»	Class I Cat. I	Class II Cat. II	Out of Grade Non conforme	Notes
External Colour Couleur externe	1, 2, 3, 4, 5, 6, 7, 8, 9			10	<ul style="list-style-type: none"> •Progressive •Uniformity: only 3 adjacent colour degrees allowed within the same consignment •Évolutif •Homogénéité : seuls 3 degrés de couleur voisins sont admis dans le même colis

Examples of lemon grading according to external colour



SIZE

The UNECE standards for citrus fruit has set a minimum size of 45 mm in diameter (see table 1).

Uniformity: The maximum difference in diameter between fruit in the same package shall be limited to:

- ✓ 10 mm, if the diameter of the smallest fruit as indicated on the package is <60mm.
- ✓ 15 mm, if the diameter of the smallest fruit as indicated on the package is ≥ 60 mm but <80mm.
- ✓ 20 mm, if the diameter of the smallest fruit as indicated on the package is ≥ 60 mm but <110mm.
- ✓ There is no limitation of difference in diameter for fruit ≥ 110 mm.

Size Codes for lemons

Size Code	Diameter (mm)
0	79-90
1	72-83
2	68-78
3	63-72
4	58-67
5	53-62
6	48-57
7	42-52

In the lemon trade, size is often indicated by fruit count per box, often varying from 60 to 140 per 14–15 kg.

LABELLING

To protect the right of consumers, each package must bear the following details, in letters grouped on the same side, legibly and indelibly marked, and visible from the outside:

- a) information about the packer/dispatcher and or shipper
- b) nature of the product
- c) country of origin of the product
- d) class and size of the product
- e) If certified GlobalGap, use GG number.

PACKAGING

The content of each package must be uniform and contain only lemons of the same origin, variety or commercial type, quality, and size, including a same degree of ripeness and development. The lemons must be packed in such way as to protect them properly to withstand transport and handling and the packages must be free from foreign matter.

- ✓ Materials used inside the package: clean, not causing damage to the lemons, printing or labelling only with non-toxic ink or glue.
- ✓ Stickers: Stickers on the produce must not leave traces when removed. Wrapping: only dry, new and odourless paper must be used.
- ✓ Use of substances: any substance tending to modify the natural characteristics of the lemons, especially in taste or smell, is prohibited.

Common packaging

- ✓ Lemons loose or organised in boxes of 14kg–18kg, open or closed;
- ✓ Lemons in nets or bags in boxes of 14kg–18kg.

Additional labelling requirement

Besides the general labelling requirements, there is a compulsory labelling for citrus fruits that are subject to post-harvest processing using preserving agents or other chemical substances. This is because of the culinary use of lemon skin.

PHYTOSANITARY REQUIREMENTS

Fruits to be exported to various markets must comply with the legislation on plant health.

Most destination markets require lemons to go through plant health checks before entering or moving within their countries for example EU, USA and Asia. Lemons must originate from an area free from fruit fly (*Tephritidae*) or undergo effective treatment.

Exporters are encouraged to consult with their Agriculture Ministries to be issued a relevant certificate/permit.

STANDARDS

Environmental and social issues are becoming more and more important in the supply of fresh fruit. Social and environmental certification schemes include actions aimed at sharply reducing and registering the use of pesticides, taking action to ensure the safety of employees and/or even including price guarantees.

Exporters are urged to comply with food quality and safety standards such as Global GAP, Fair Trade and Sustainable Agriculture Network:

- a) **GLOBAL G.A.P. Crops (Global Good Agricultural Practice):** the standard is primarily designed to reassure consumers about how food is produced on the farm by minimising detrimental environmental impacts of farming operations, reducing the use of chemical inputs and ensuring a responsible approach to worker health and safety as well as animal welfare.
- b) **HACCP (Hazard Analysis and Critical Control Points),** Requirements for the hygiene of food is laid down and states the general hygiene procedures for food at all stages of the production process from primary production to the world consumer (“*from-farm-to-fork approach*”).
- c) **Fair Trade International:** an independent, non-governmental, not-for-profit organization that promotes sustainable development and poverty alleviation and sets the Fairtrade standards. One organization (FLO-CERT) is responsible for auditing and certification of compliance against the Fairtrade standards.
- d) **Sustainable Agriculture Network - Rainforest Alliance:** network of conservation groups committed to community-based conservation initiatives and research. The certification program for SAN standards is operated by Rainforest Alliance.
- e) **BRC (British Retail Consortium) - BRCGS' Standards** guarantee the standardisation of quality, safety and operational criteria and ensure that manufacturers fulfil their legal obligations and provide protection for the end consumer. Certification to BRCGS' Standards is now often a fundamental requirement of leading retailers, manufacturers and food service organisations.
- f) **IFS (International Food Standard) -** The IFS comprise eight different food and non-food standards, covering the processes along the supply chain. However, IFS does not specify what these processes must look like but merely provides a risk-based assessment of them. The different standards are now used by manufacturers and retailers worldwide to meet new requirements for quality, transparency and efficiency resulting from globalisation.

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