



MARKET UPDATE NOVEMBER 2025

The citrus market continues to show a clear divergence between lemon and lime. Lemon is under sustained pressure, with tight supply and higher input costs, while lime remains more available but is now moving gradually higher in price. For UK manufacturers, the priority is managing lemon exposure and planning for modestly firmer lime costs.

Lemon – Tight Supply, Elevated Costs

Lemon supply remains constrained across key producing regions. Recent seasons have brought smaller crops, shorter campaigns and adverse weather, particularly affecting later varieties. This has reduced fruit available for processing and limited flexibility for both juice and concentrate.

Strong fresh-market demand and attractive retail returns have encouraged growers to prioritise fresh sales, further reducing volumes available for industry. Stocks of lemon NFC are very low, and new contracts for both NFC and concentrate are being agreed at clearly higher levels than in previous seasons. Supply is not expected to normalise quickly, so an elevated lemon cost base is likely to persist through at least the coming year, even if there are brief periods of relative stability around peak harvest.

Lime – Good Availability, Gently Firmer Prices

Lime remains structurally more comfortable than lemon in terms of availability. Recent crops have progressed without major disruption, industrial demand is steady and core specifications for juice and concentrate are readily accessible.

However, lime prices are edging higher rather than easing. Firm demand, currency movements and logistics costs are putting gentle upward pressure on replacement values. In addition, as lemon costs rise and availability tightens, some buyers are looking to substitute part of their lemon use with lime, which could further increase demand and reinforce this upward trend.

Processing in key origins usually occurs in the first half of the year, shaping prices for shipments from mid-year onwards. On current indications, costs are expected to be broadly stable to slightly higher over the next cycle, with no clear sign of a downward correction.

Implications for UK Food Manufacturers

- Lemon – Supply remains tight, costs are elevated, and prices for lemon-based ingredients are likely to stay firm for the foreseeable future.
- Lime – Availability is comparatively good, but prices are on a gradual upward trend. Lime remains more manageable than lemon, but budgeting should allow for modest firmness rather than assuming cost relief.

For 2026 planning, manufacturers should review lemon exposure, secure cover early for critical applications and build in a slightly firmer trajectory for lime. Overall, citrus remains manageable but tight on lemon and gently firmer on lime, making early planning and robust internal forecasting essential to avoid sudden cost shocks.



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