

# EXPERT GROUP FRUIT AND VEGETABLES OBSERVATORY. SUBGROUP ON CITRUS.

## ES LEMON AND GRAPEFRUIT

1. OBSERVING LAST SEASON.
2. OBSERVING PRESENT SITUATION.
3. OBSERVING SHORT TERM FUTURE “crystal ball”
4. LEMON ROADMAP.

**JOSE-ANTONIO GARCÍA**  
**DIRECTOR**

**13 NOVEMBER 2019**

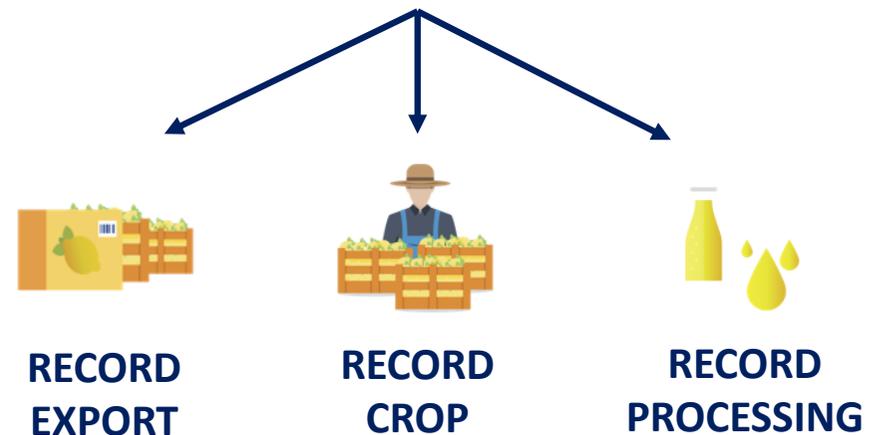


## LEMON CAMPAIGN BALANCE 2018/2019

	15/16	16/17	17/18	18/19	DIF 18/19-17/18
 EU EXPORTS	497,805	625,053	583,185	643,966	10 %
 NON EU EXP.	27,269	40,948	34,088	43,947	29 %
 DOMESTIC	150,480	160,000	184,392	184,392	0 %
 LOSSES	16,889	43,778	40,083	74,615	86 %
 PROCESSING	108,410	282,118	211,374	355,155	68 %
<b>TOTAL</b>	<b>800,852</b>	<b>1,151,897</b>	<b>1,053,123</b>	<b>1,302,076</b>	<b>24 %</b>

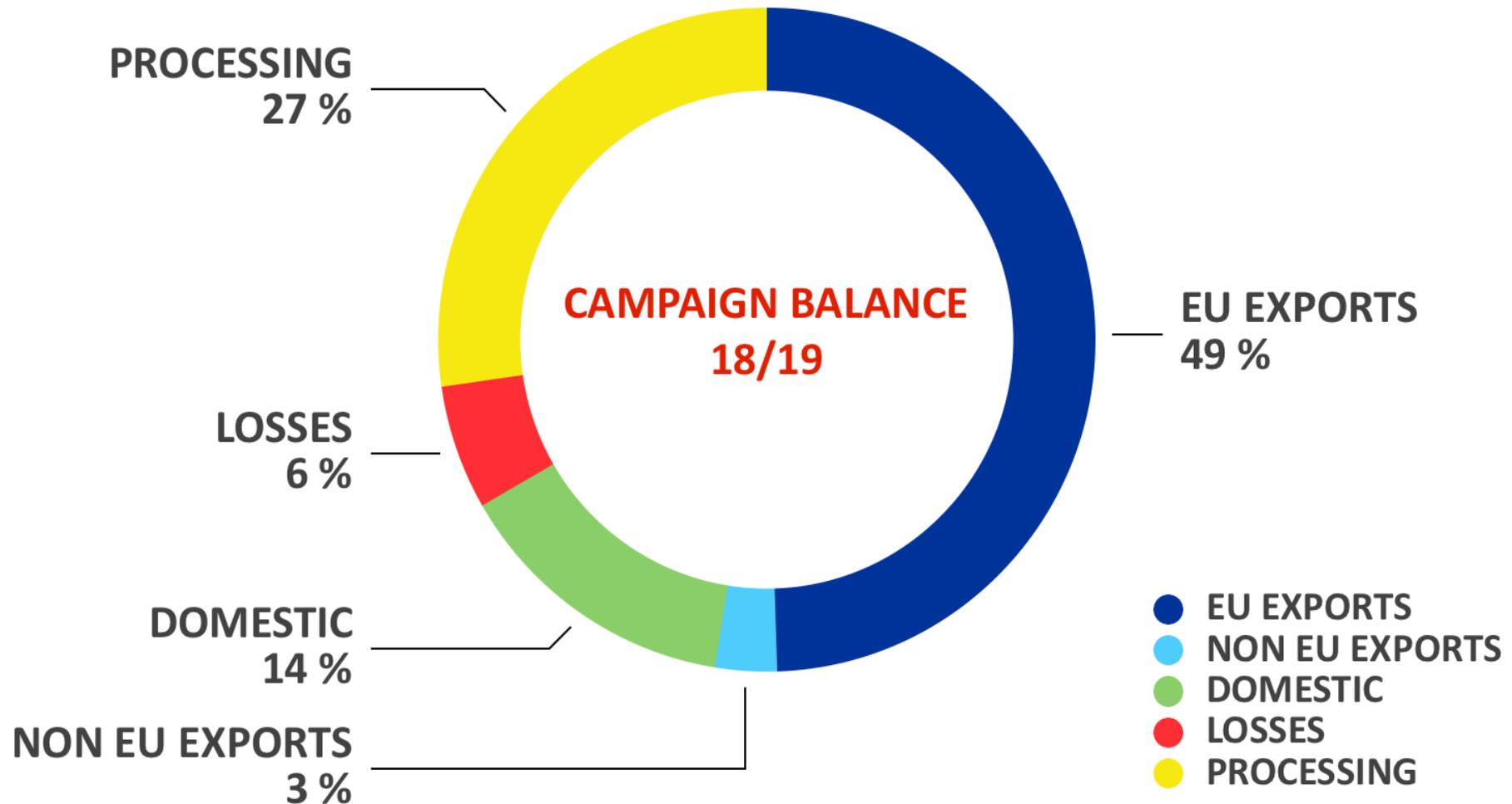
PROFITABLE RETURN FOR GROWERS

SPANISH SEASON: 11 MONTHS





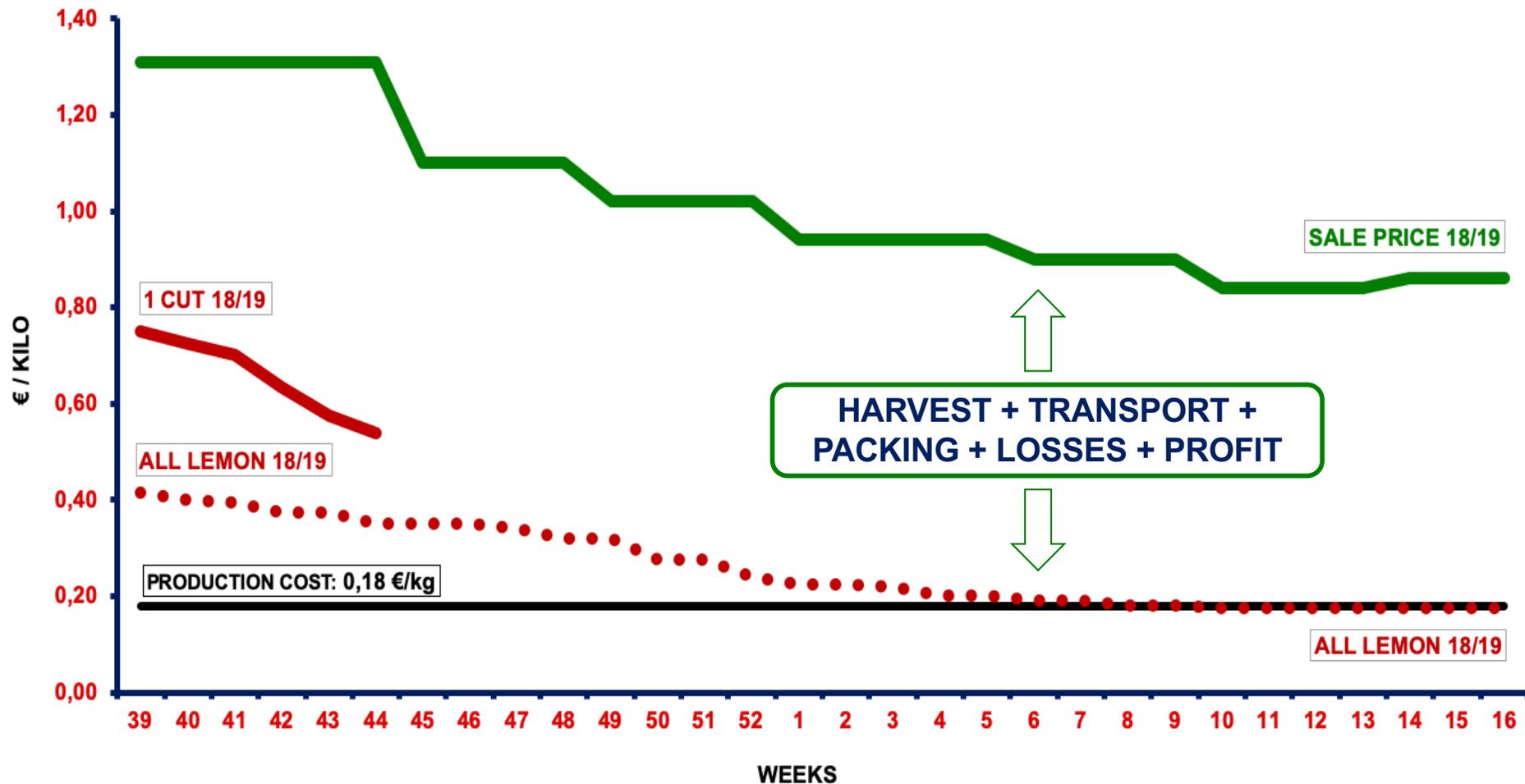
## DESTINATION OF LEMON PRODUCTION 2018/2019





## EVOLUTION OF LEMON PRICES (FINO VARIETY) 18/19

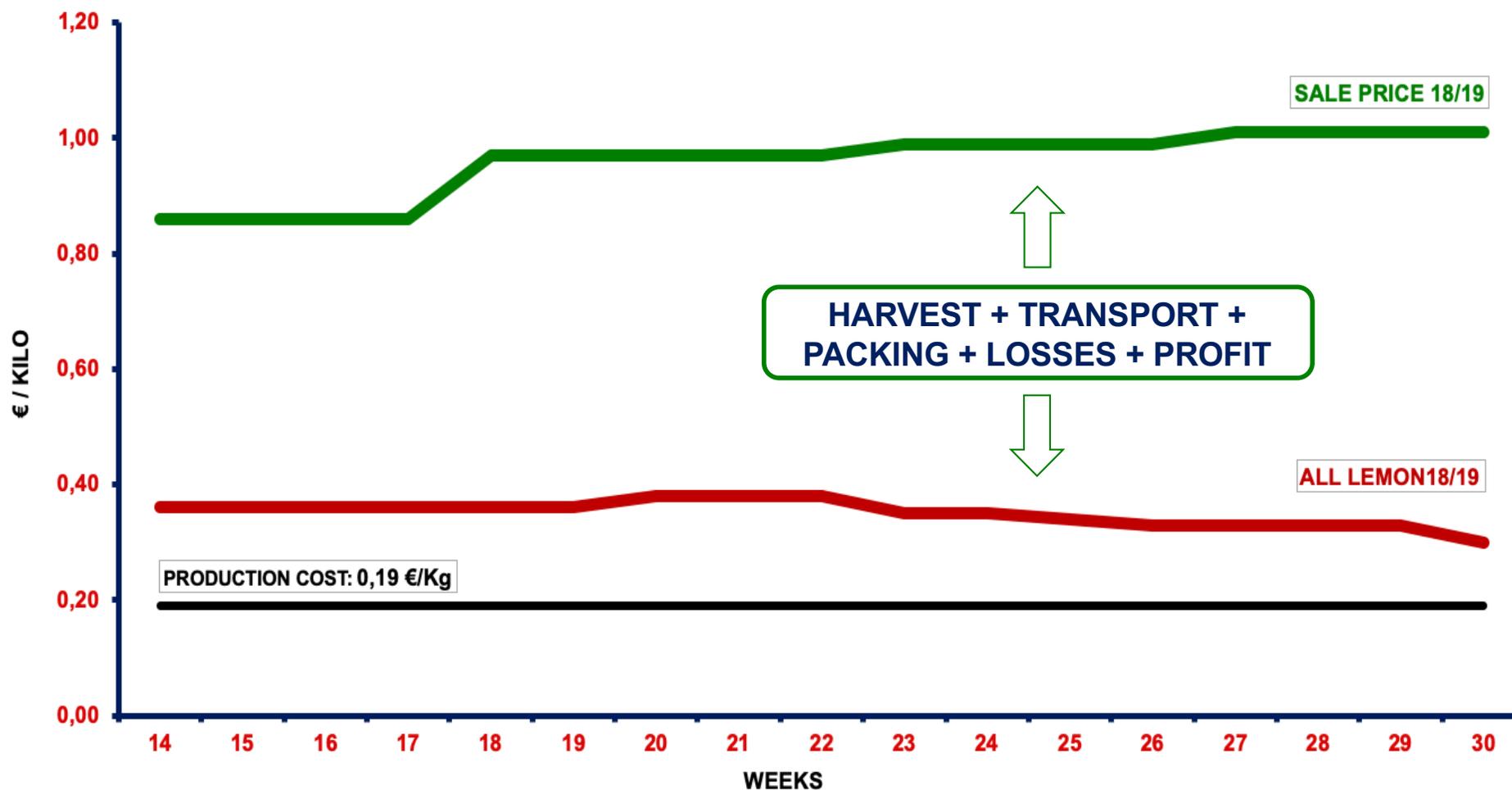
### GROWER RETURN AND FOB EXPORT PRICES





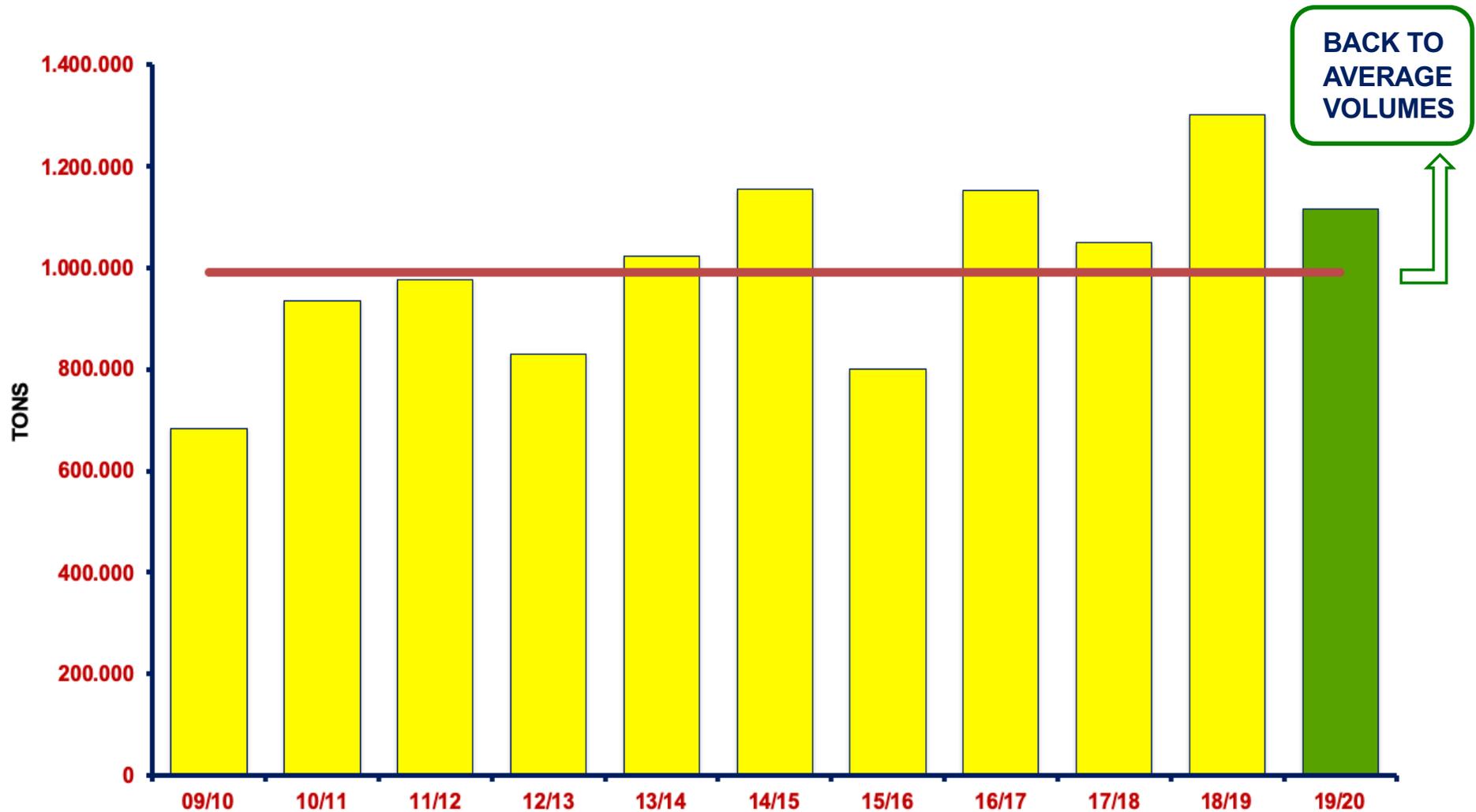
## EVOLUTION OF LEMON PRICES (VERNA VARIETY) 18/19

### GROWER RETURN AND FOB EXPORT PRICES





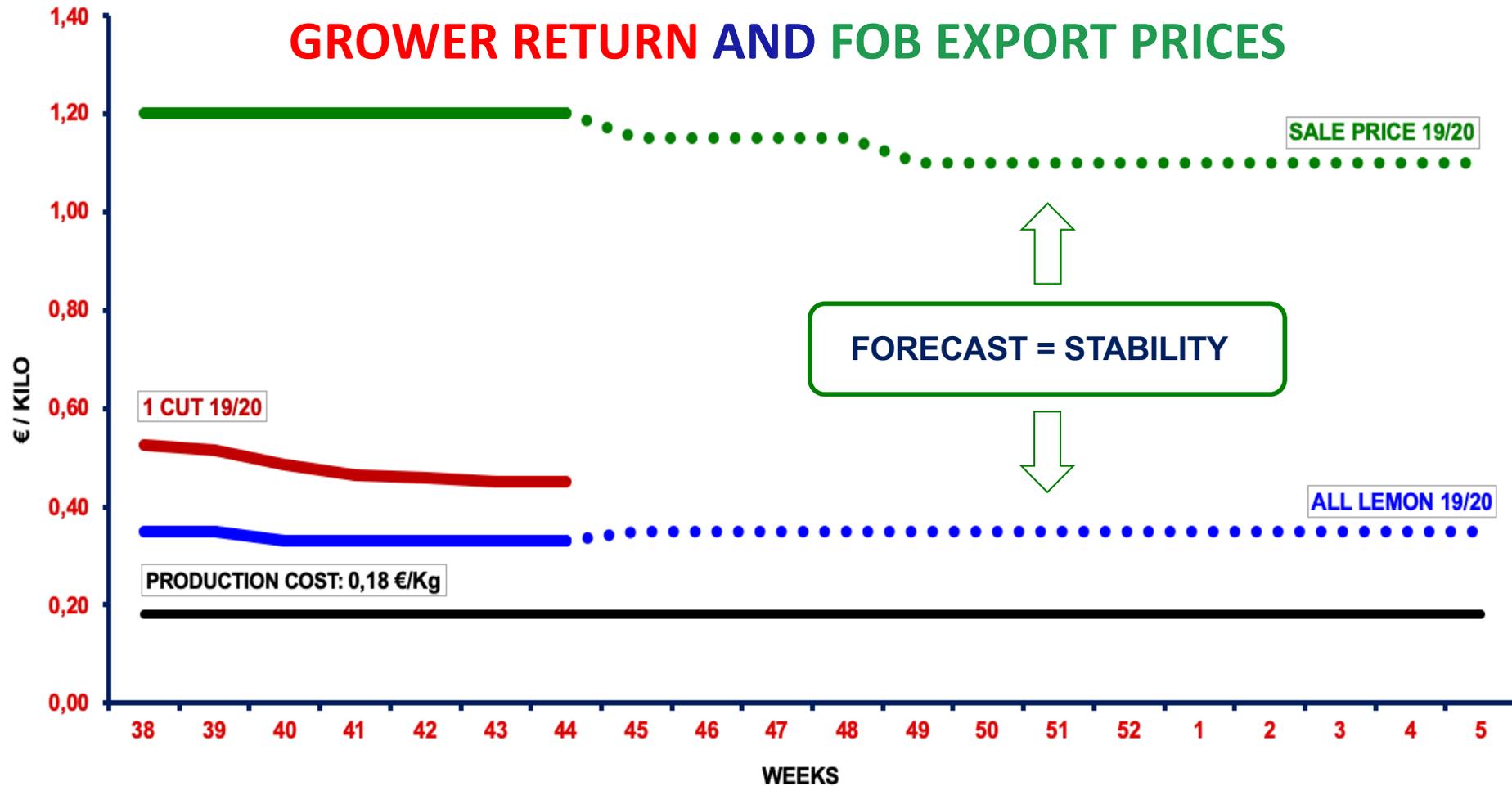
## EVOLUTION OF LEMON CROP & FORECAST 2019 / 2020





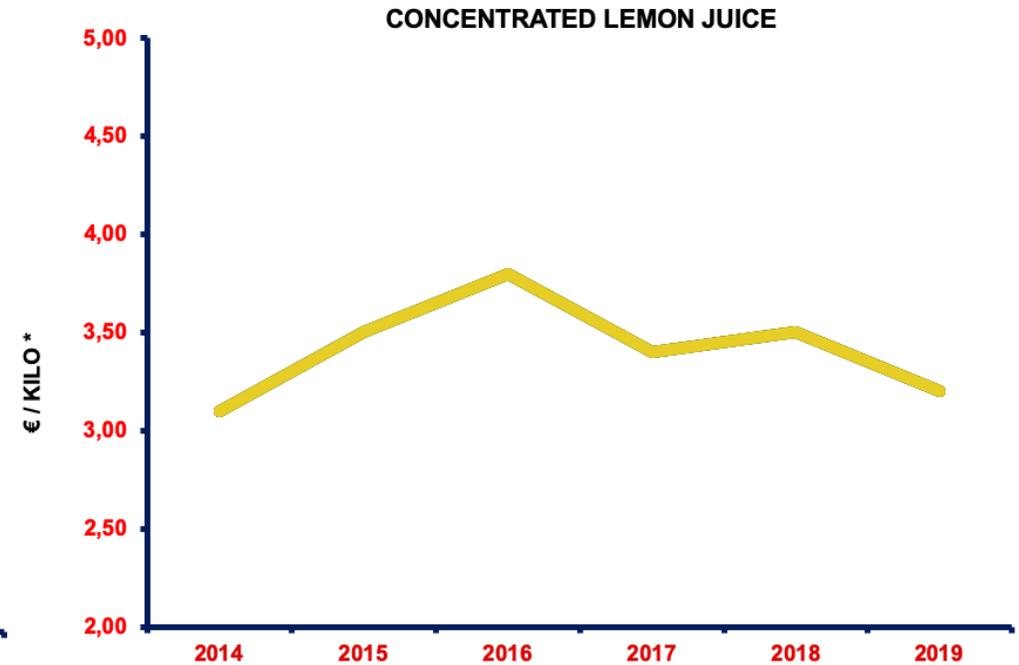
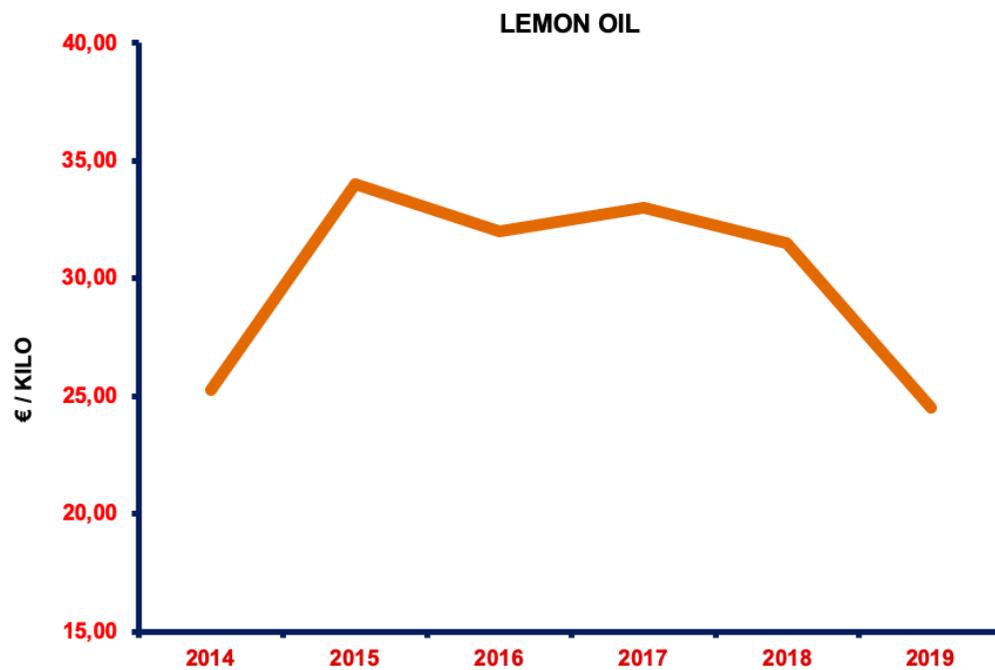
## START AND PERSPECTIVE OF THE FINO LEMON. 19/20 CAMPAIGN FIRST WEEKS DATA AND 3-MONTHS FORECAST

### GROWER RETURN AND FOB EXPORT PRICES





## PROCESSING MARKET DYNAMICS



\* 400 gpl





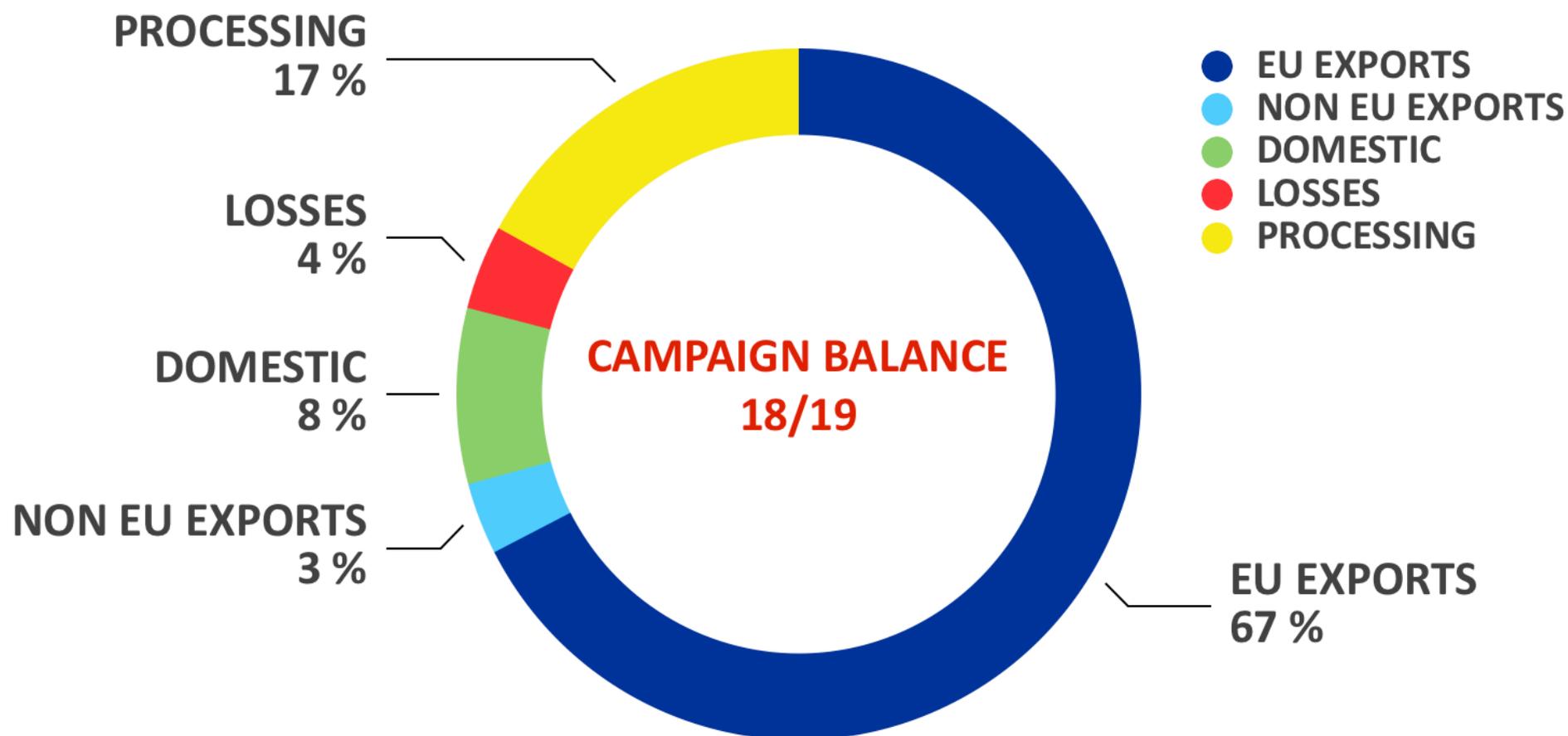
## GRAPEFRUIT CAMPAIGN BALANCE 18/19

	15/16	16/17	17/18	18/19	DIF 18/19-17/18
 EU EXPORTS	53,782	57,942	49,279	57,467	17 %
 NON EU EXP.	2,978	2,535	3,022	2,868	-5 %
 DOMESTIC	7,000	7,000	7,000	7,000	0 %
 LOSSES	3,188	3,374	2,965	3,367	14 %
 PROCESSING	6,280	9,511	10,919	14,509	33 %
<b>TOTAL</b>	<b>73,227</b>	<b>80,362</b>	<b>73,185</b>	<b>85,211</b>	<b>16 %</b>



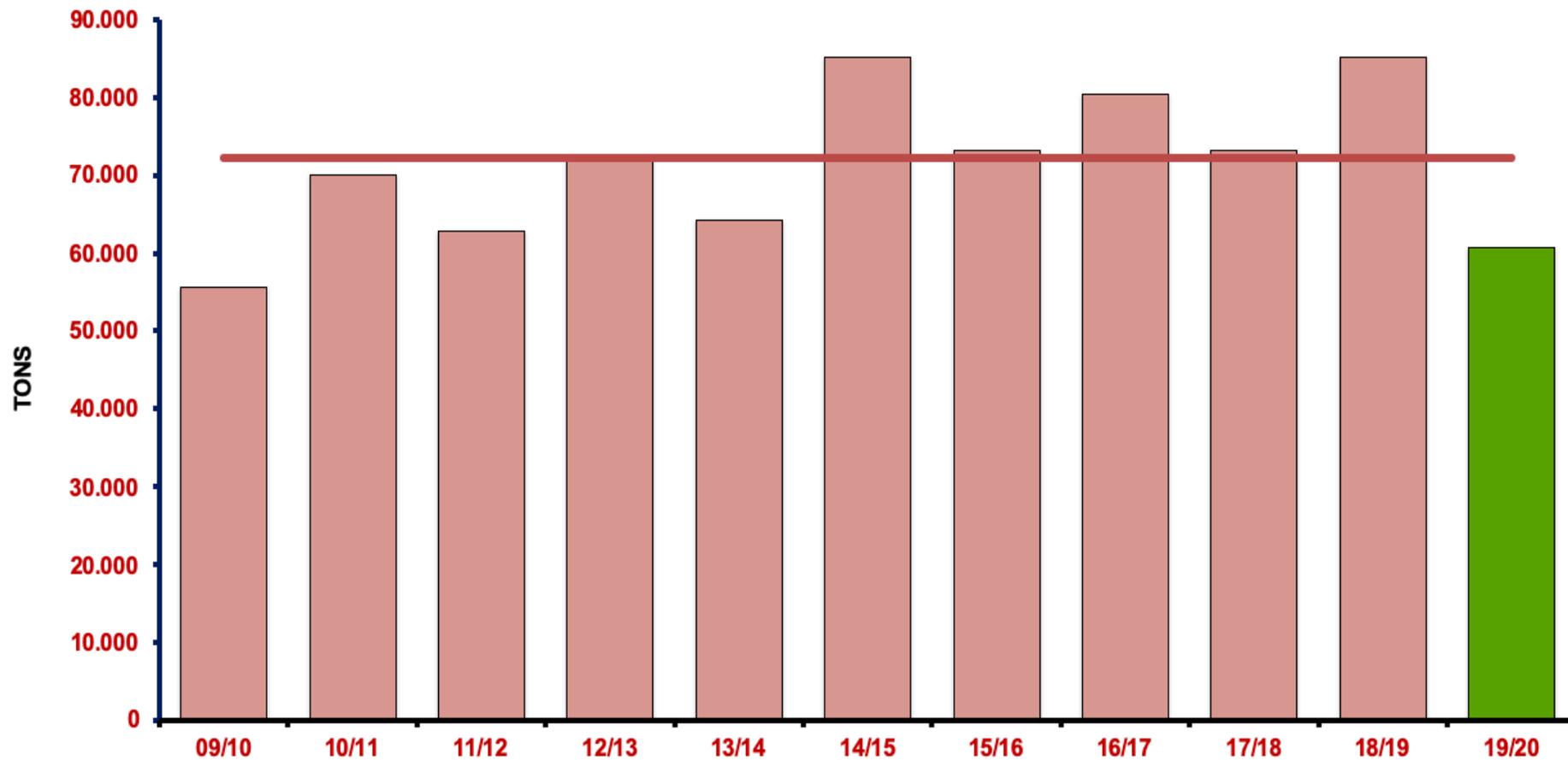


## DESTINATION OF GRAPEFRUIT PRODUCTION 18/19



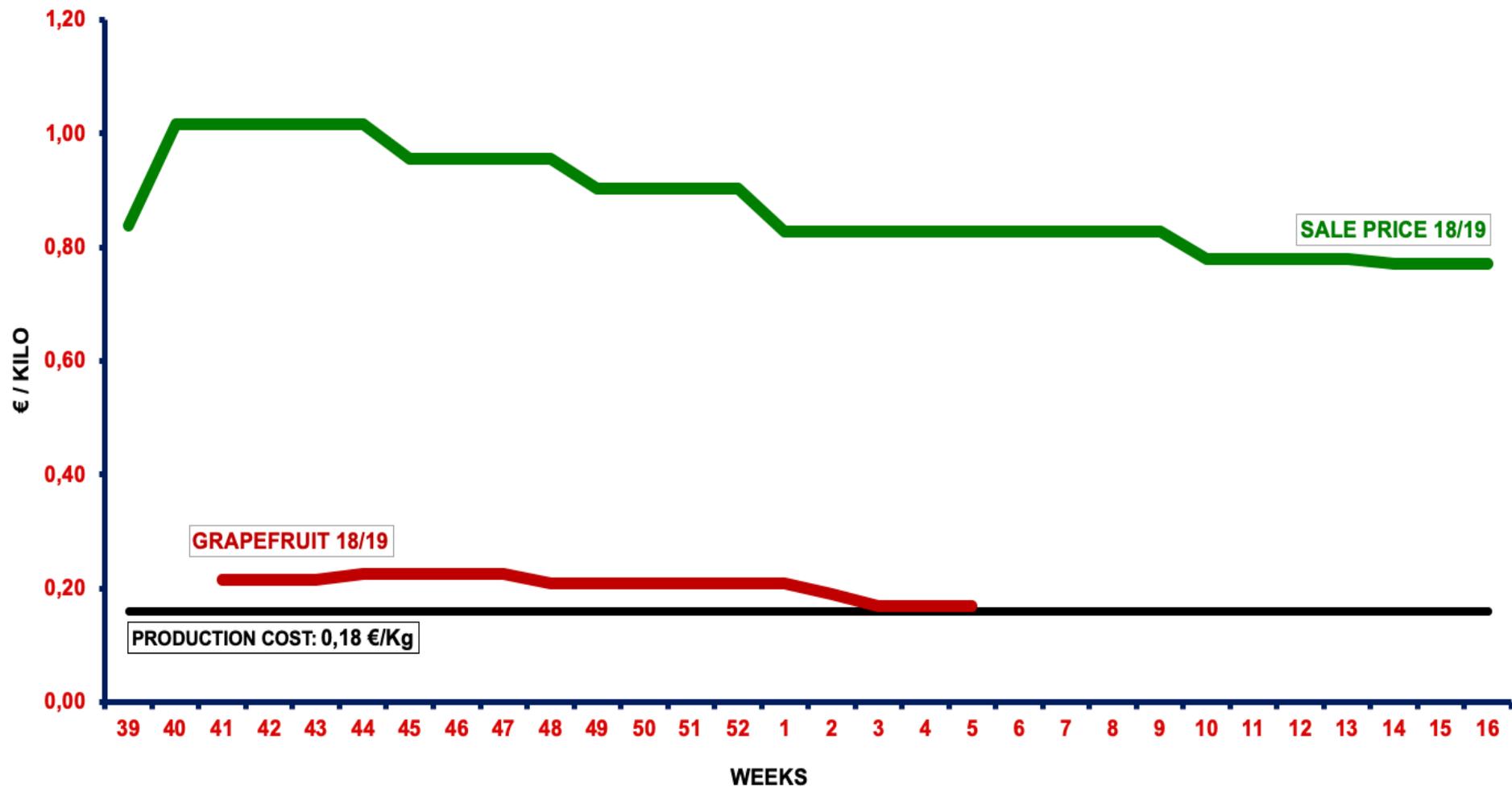


## EVOLUTION OF GRAPEFRUIT CROP ESTIMATE 2010 / 2020





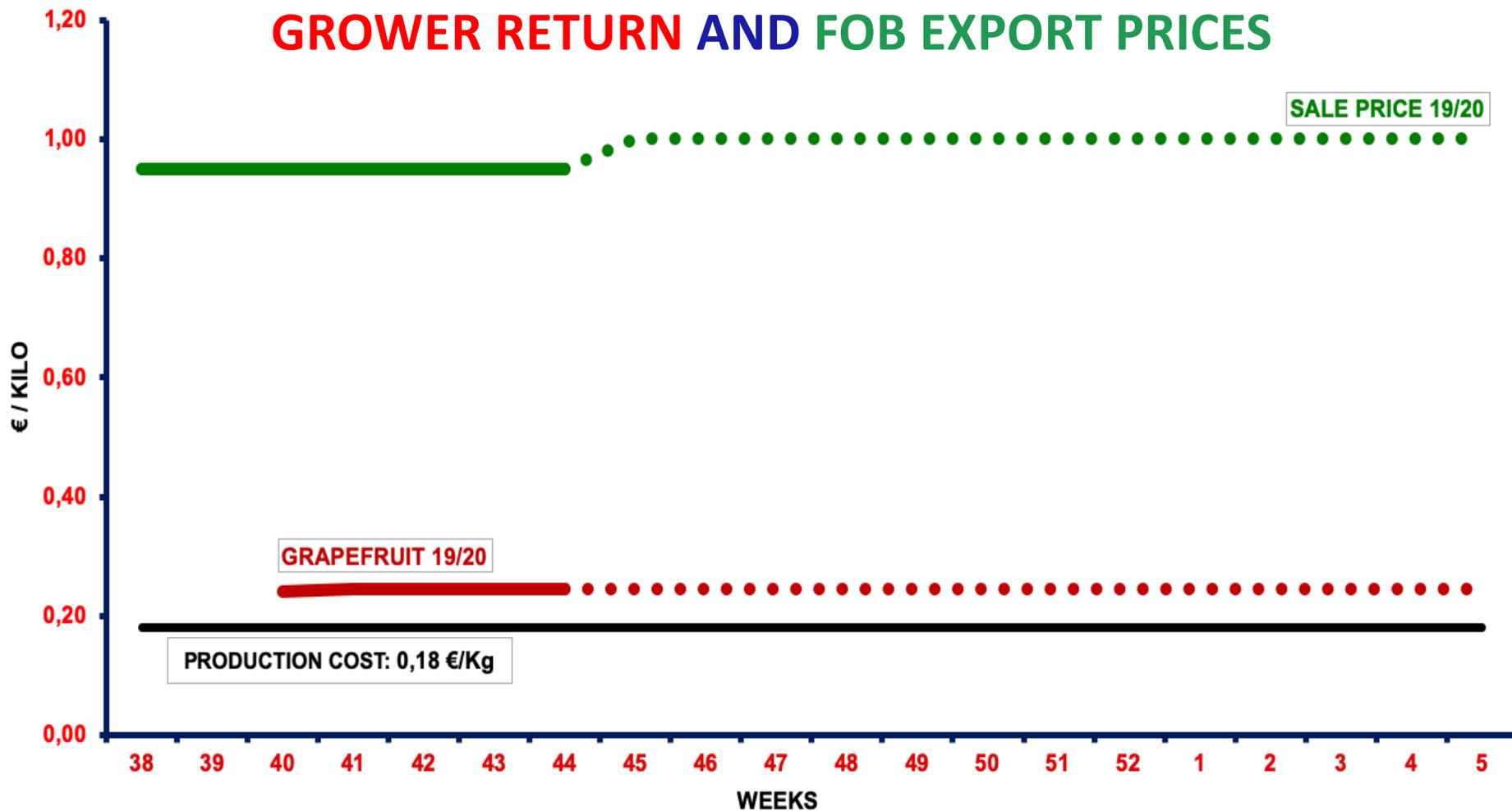
## PRICES EVOLUTION OF GRAPEFRUIT 2018/19 GROWER RETURN AND FOB EXPORT PRICES





## EVOLUTION OF THE PRICE OF RED GRAPEFRUIT 2019/20 FIRST WEEKS DATA AND 3-MONTHS FORECAST

### GROWER RETURN AND FOB EXPORT PRICES





## SUSTAINABILITY. MULTIPLE FOCUS

### SPANISH LEMON® (FRESH + PROCESSED)

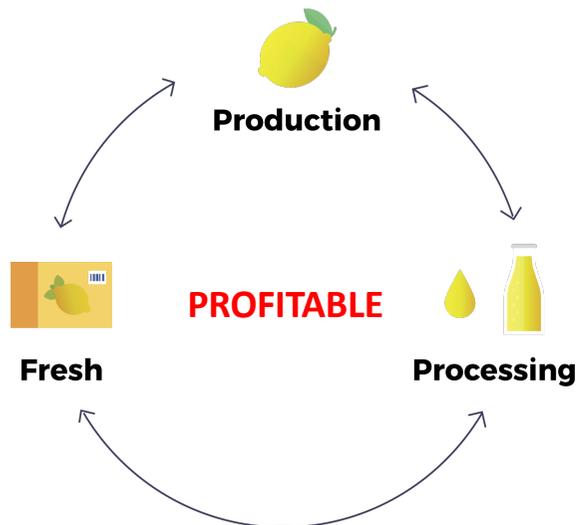
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### 3 PILARS

**ECONOMIC**

**SOCIAL**

**ENVIRONMENTAL**





## FRESH LEMONS PROMOTION CAMPAIGNS

- ❖ **AILIMPO** has been granted 2 European Promotion Programs within the **AGRI-SIMPLE- 2019** call:

### GOALS

1. Differentiate Spanish lemon production from that of third countries.
2. Emphasise the **value** of lemons and their **properties**.
3. Promote the **consumption** of Spanish lemons.
4. Modernise the **product** and its **consumption**.

**BOTH PROGRAMMES WILL LAST 3 YEARS  
2020,2021 AND 2022**

BUDGET	PROGRAMMES	IMPACTS
5,23MM€	Internal Market (France/Spain/ Germany)	121MM
+		+
1,27MM€	Third countries (USA/Canada)	69MM
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6,5MM€	← TOTAL →	191MM