



# **SUSTAINABILITY AND 10-YEAR STRATEGY OF THE SPANISH CITRUS MARKET**

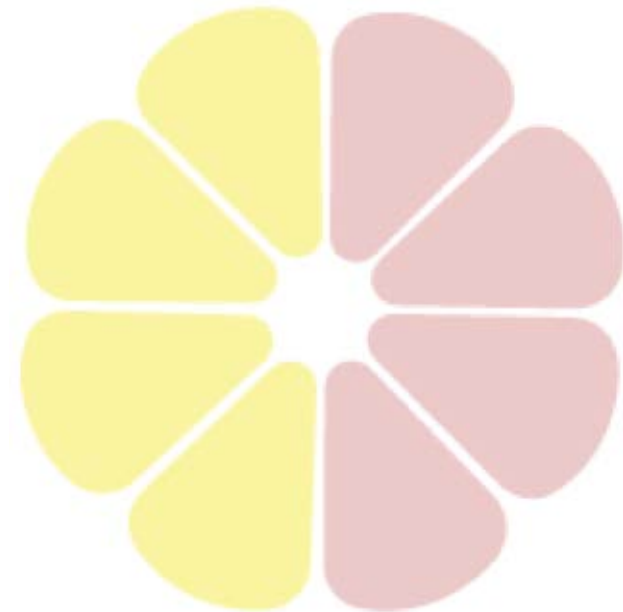


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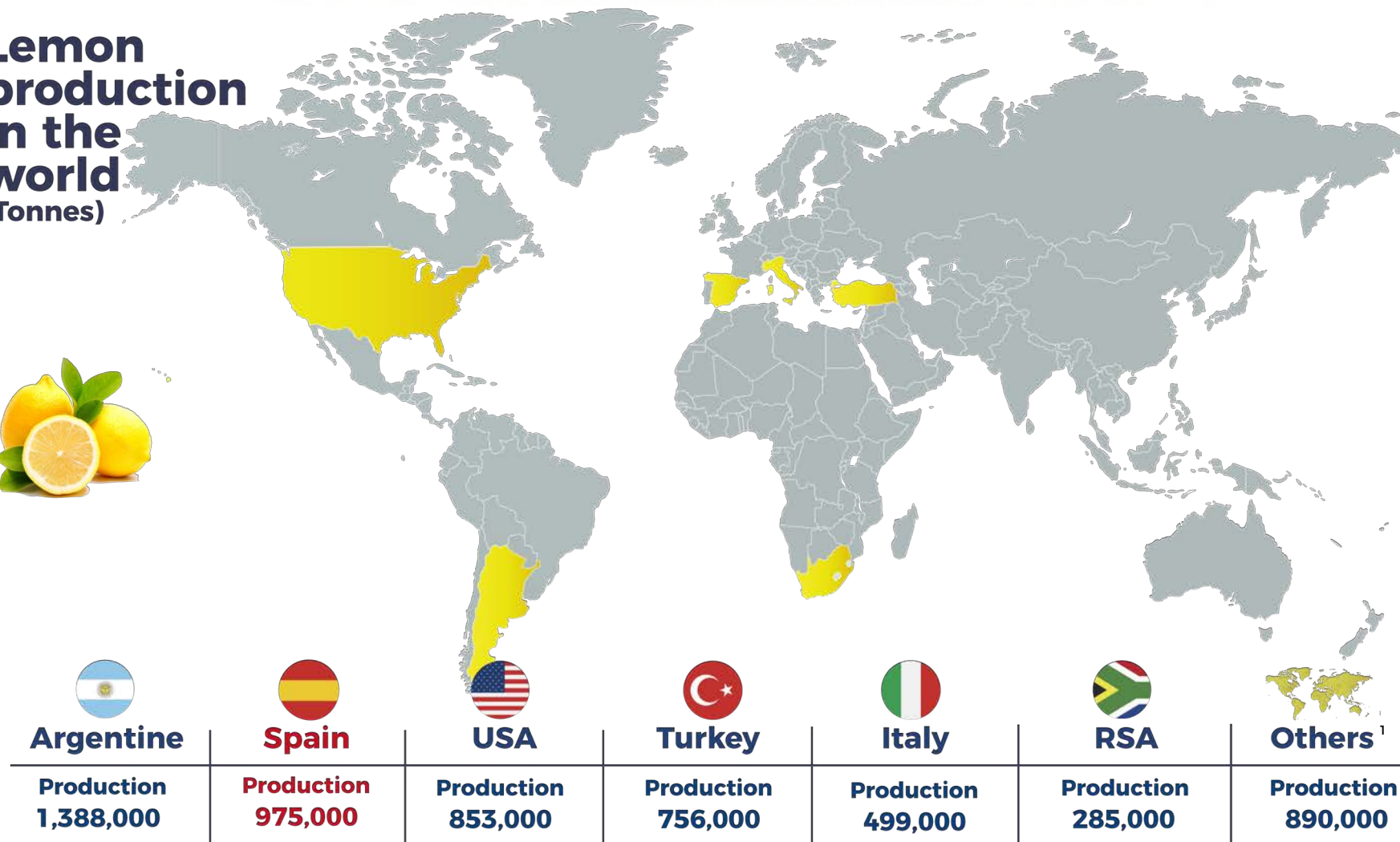
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- 1. Spanish Lemon Sector.**
- 2. Roadmap: 3 CHALLENGES**
- 3. Conclusions.**





## Lemon production in the world (Tonnes)



**TOTAL**

**Data: Average 2010-2017**

**Production 5.646.000**

<sup>1</sup> Egypt, China, Mexico, Bolivia, Brazil, Australia, Uruguay and others.



# Spain's Citrus Position Worldwide: 6,8 Mill. Tons out of 100





## Spanish Lemon Sector: 1 Mill Tons out of 6,8 (Total Citrus)

 **Main data.**

 **Varieties.**

 **Processing  
Lemon.**

**4-6**

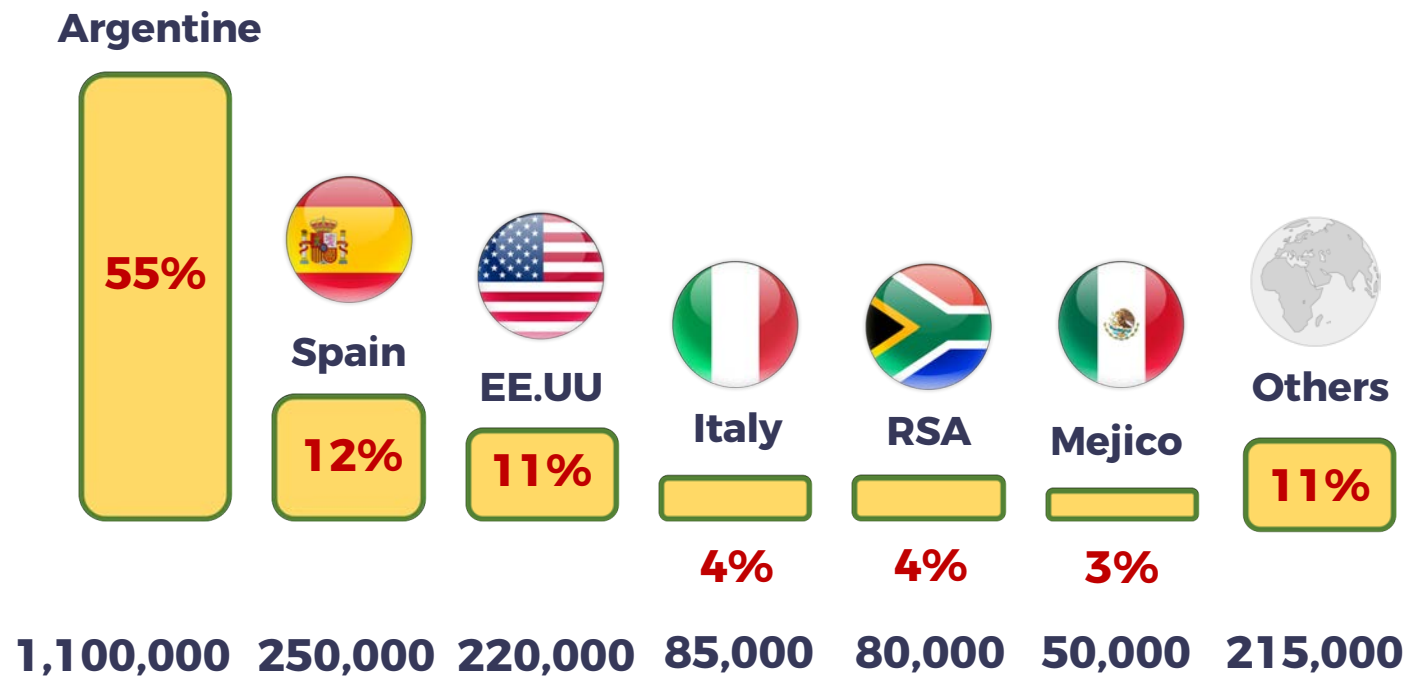




## Lemon Processed in the world.



### TOTAL lemon Processed in Tonnes



Data: Average 2010-2017



## Where the Old and the New Come Together



**“Traditional”**



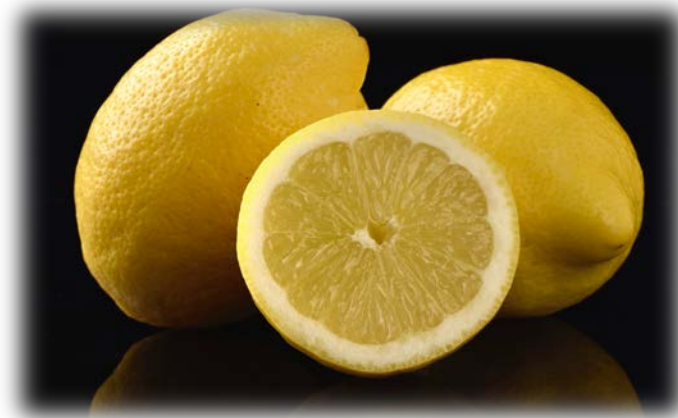
**“Technified and Modern”**



## **Spanish Main Lemon Varieties**

**“Fino”**

**“Verna”**



**From September to April**

**From May to July**

**Spherical Fruit**

**Elongated Fruit**

**Fine Skin**

**Thick Skin**

**Higher content of Juice**

**Few Seeds**

**High Acidity**

**Spain Main Supplier**





## 10 Years Roadmap.

### 3 GREAT CHALLENGES

- 🍋 **Organic.**
- 🍋 **Phytosanitary protection in the EU.**
- 🍋 **Sustainability: THE BIG CHALLENGE**

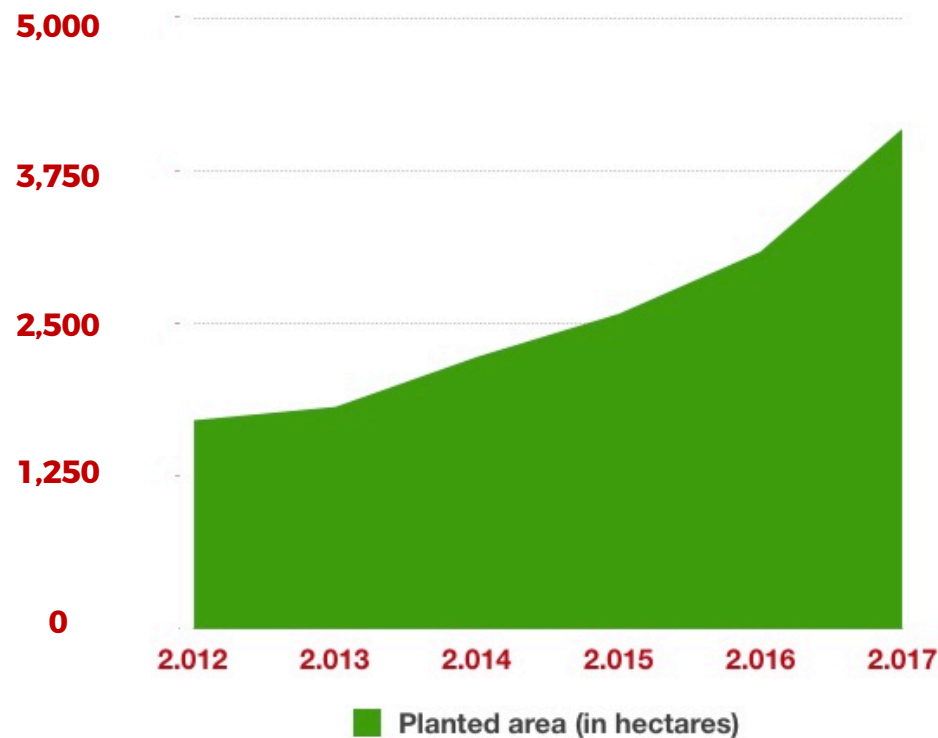
**5-6**



# ORGANIC LEMON >> LEADING A NEW NICHE MARKET

**Organic lemon surface in Spain (2012 to 2017)**

**SPAIN >> KEY SUPPLIER WORLDWIDE +100.000 TONS TOTAL PRODUCTION**



**Year Planted area**

**2.012 1,708 ha**

**2.013 1,818 ha**

**2.014 2,227 ha**

**2.015 2,579 ha**

**2.016 3,087 ha**

**2.017 4,091 ha**





## Phytosanitary Protection in The EU >> Key point to keep activity in the future

### Why is Plant Health so important in the EU?

*“Plants form the basis of our food chain: without plant production there would be neither food for humans nor feed for animals. They are also a part of the natural environment in which we live, as well as the landscape of our daily lives. Therefore **outbreaks of plant diseases may have devastating effects on the quality of our lives and our economy**. Plant diseases may affect the livelihoods of farmers, nursery owners or traders, the quality and prices of our food as well as the condition of our forests and parks.”*

**Main Potential Risks, NOT Present in the EU BUT present in other producing areas in the world:**

**HLB**

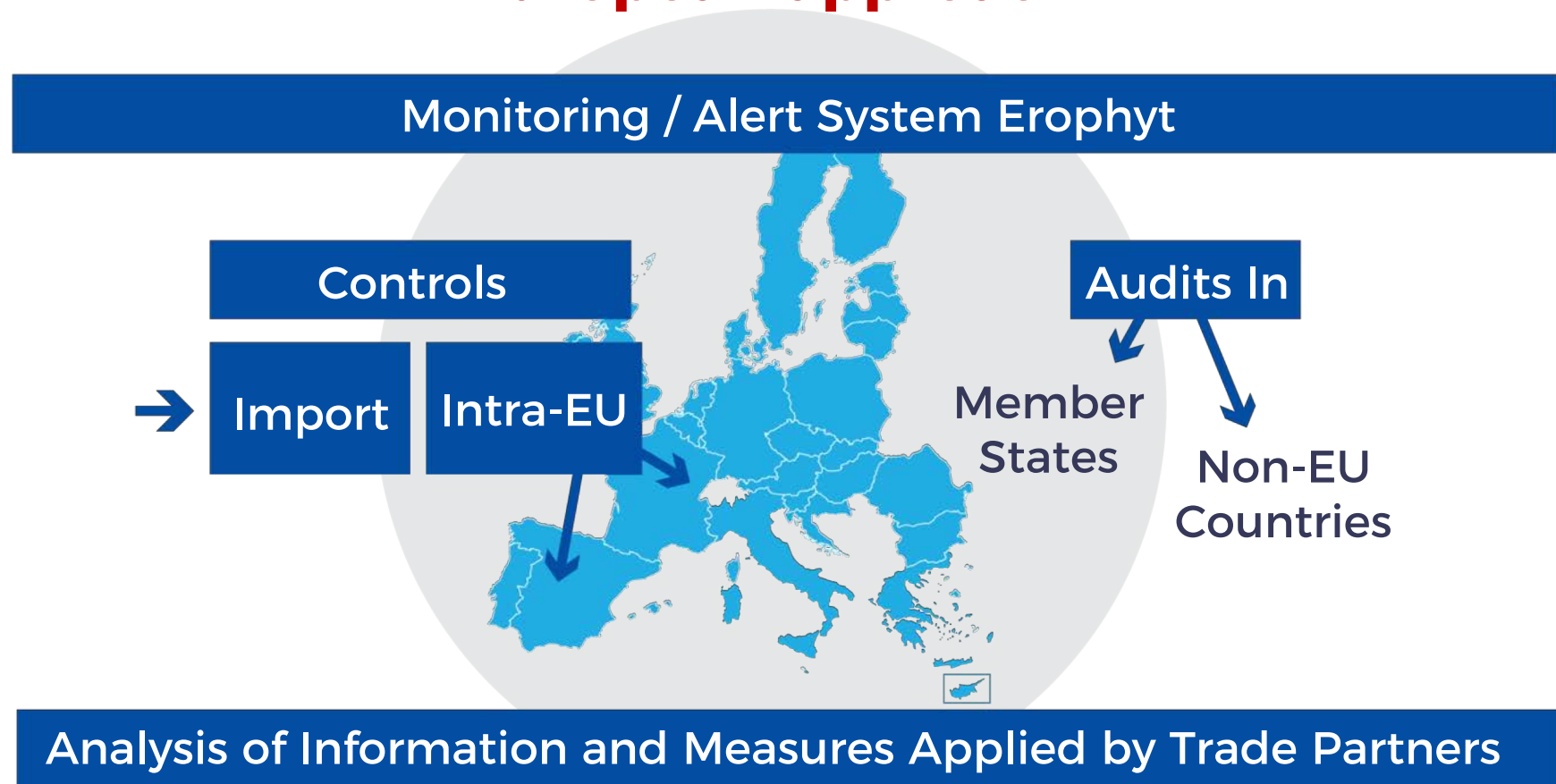
**Citrus  
Canker**

**Citrus  
Black Spot**

**False  
Codling  
Moth**



## Ensuring Phytosanitary Protection in the EU >> A Global European approach



→ **Emergency Measures When Needed eg  
CBS**



## UN 17 SUSTAINABLE DEVELOPMENT GOALS (SDG's) TRANSFORMING THE WORLD



**Our vision:** What benefits the lemon sector, also benefits the planet.

We are small but we can help. It is our responsibility.



## **SUSTAINABILITY: The new paradigm and dilemma**

- A new **WAY**: to meet society's needs in the present without compromising the ability of future generations to meet their own needs.
- Consumers are concerned >> the industry has to be concerned and the supply chain must react to produce “**VALUES-BASED**” Fresh lemon, lemon juice and lemon oil.
- A new **CONCEPT** >> lacks a concrete and uniform meaning, BUT someone who knows the consumers expectations gave us the clue... & the inspiration.
- It is a new attitude, a new approach, being responsible and promoting a better world.



## **SUSTAINABILITY: WHAT ARE WE TALKING ABOUT?**

**MUCH MORE THAN JUST BIRDS, INSECTS & PLANTS, ...  
BUT WE ALSO TAKE CARE OF THEM**



Recovering  
Autochthonous fauna  
and flora: (lizards,  
birds, grass, bees...)





## SUSTAINABILITY: Multiple Focus



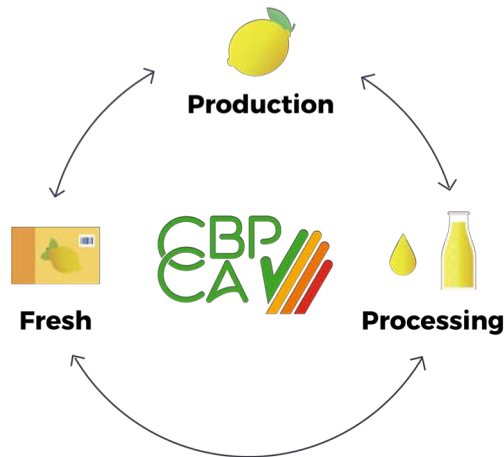


# **SUSTAINABILITY: Multiple Focus** **Spanish Lemon® (Fresh + Processed)**

=

## **3 PILARS**

**Economic**



**Social**

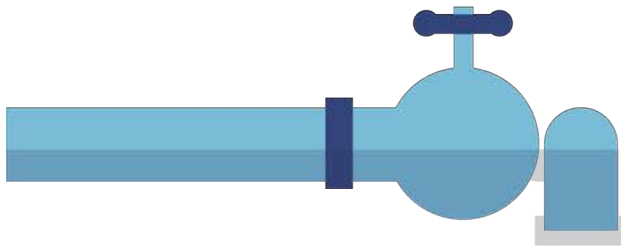


**Environmental**





## MORE ABOUT NATURAL RESOURCES (average data)



**Water needs and  
efficient use**



**Positive CO<sub>2</sub> balance:  
Net CO<sub>2</sub> capture**

**Positive CO<sub>2</sub> balance**

**304,840**

t of CO<sub>2</sub> captured

**Equivalent to**

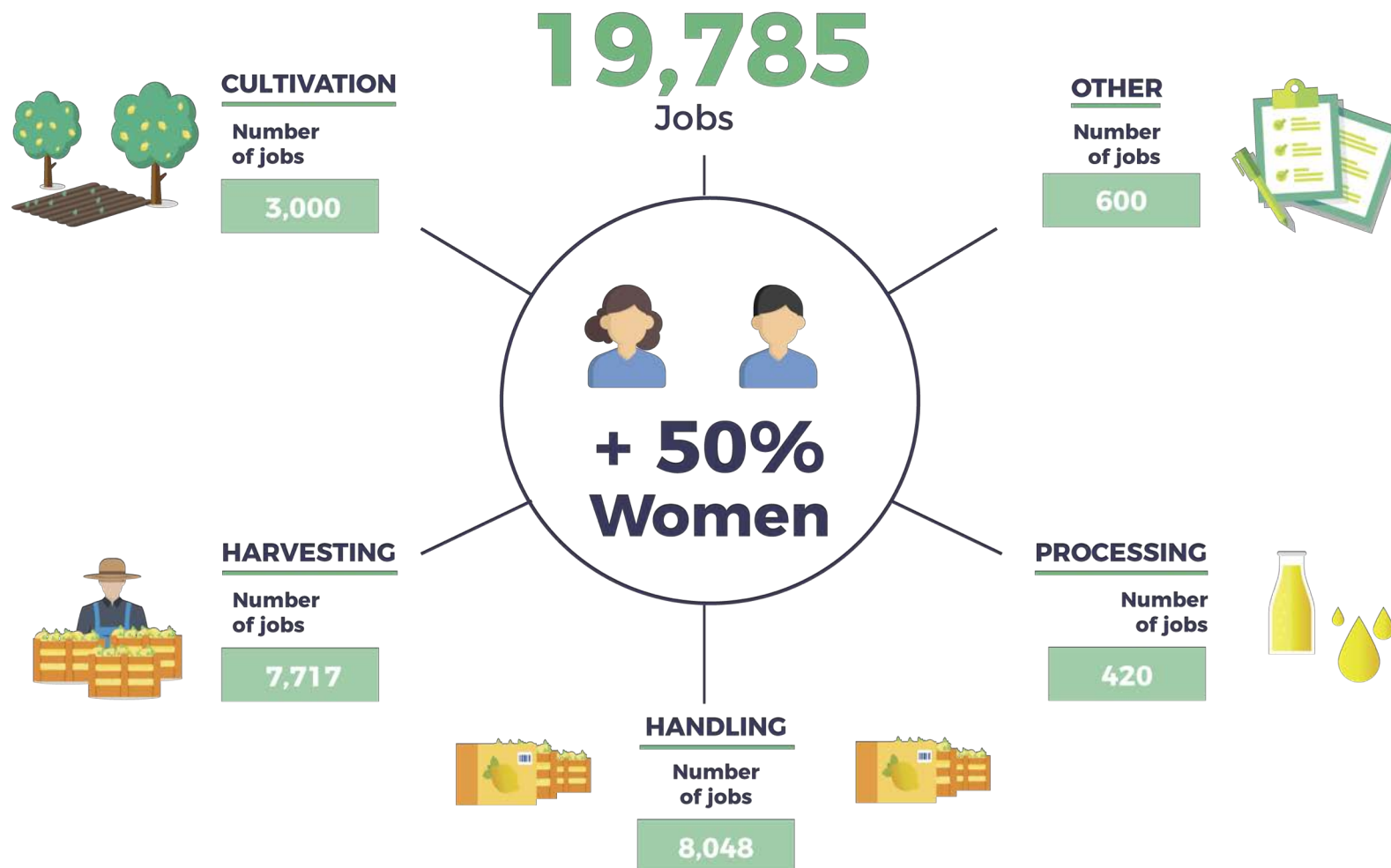
1- year's diesel consumption of  
140,000 cars driving 20,000 km/year



[www.ailimpo.com](http://www.ailimpo.com)



## IMPROVING SOCIAL MANAGEMENT SYSTEM





## On the road to MEASURE Sustainability. The Spanish Lemon Case

### General Overview.

- Using a scientific methodology based on **Economic and Financial Analysis** and **Life Cycle Analysis**.
- **Indicators** as effective and operational as possible.
- **Good practices should be quantified.**
- **The process must be continuous (3-4 years).**



### To Sum Up >> Objectives.

- Making Better Recommendations of GAP.
- A set of easily measurable and controllable social, economic and environmental indicators to be monitored on lemon farms, all in accordance with SAGP principles.
- **Metrics available in €** (Costs + Life Cycle analysis).





## TESTIMONIALS FROM GROWERS



*"When you learn to grow in a sustainable way and then you visit other conventional estates, you can see the difference and you begin to understand that another production method exists"*

***"It is not just marketing, It is a new way of doing, living and acting. Our commitment to the next generations"***

*"When I found out there was another way to farm, I understood that this is the future and there is no going back.. **You only need passion and vision**"*

*"It's not a more costly technique and you don't have to work harder. Fruit quality is superb."*





## CONCLUSSIONS & HIGHLIGHTS

- 🍋 Spain as a KEY CITRUS & LEMON PLAYER worldwide.
- 🍋 2 Varieties of Lemon: Fino and Verna (original from ES).
- 🍋 Committed with Sustainability: 3 Pilars.
- 🍋 Balance between Fresh / Processing.
- 🍋 ES has a large tradition on LEMONS, traditionally on the FRESH side.



## CONCLUSSIONS & HIGHLIGHTS



We are young on PROCESSING LEMONS but achieving good volumes.



Juice and oil Multinational clients are focusing more and more on Spanish origin



Thanks to our Traceability and Sustainability systems already in place.



SPANISH LEMON sector as a strategic partner in the future.

Our philosophy >> To have trust in “Make it happen”, not just “Wait it happen”