

# FRUIT &TECH

## THE SPANISH CITRUS INDUSTRY

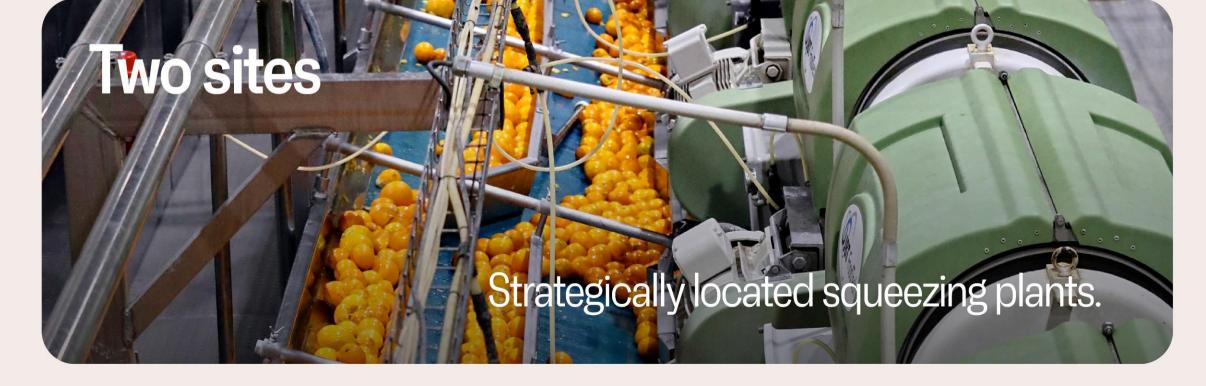
Clearwater, September 18<sup>th</sup>, 2024 Unleashing the freshness

# FRUIT & TECH, FOUNDED IN 2000









## Fruit & Vegs























And many more...

#### **SELLING TO 70+ COUNTRIES,** at worlds highest certifications standards in ETHICAL SUPPLY, **SUSTAINABILITY** and **QUALITY**













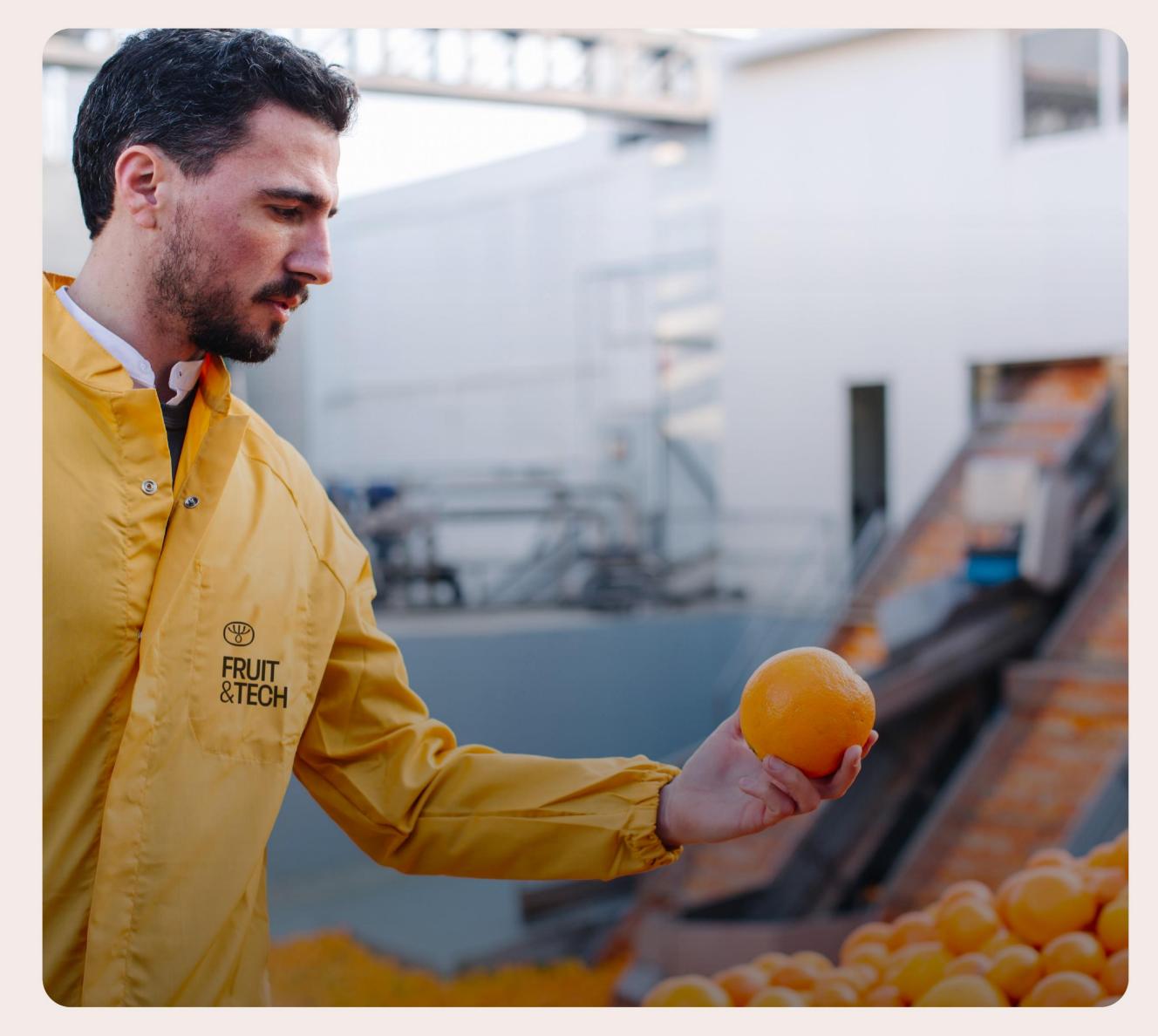








Highest Score in International Certificates



# 100% of our Commercial commitments performed AS PER CONTRACT!





## Spanish Population 47.8 M / 1.46Trillion USD 1/7 of US Population

Spain has 4 x the High Speed train network of that of the USA

Spain has 50% of its energy matrix coming from renewable sources

The US has avg is 23% Global average is 31%

## Spain is the 3<sup>rd</sup> largest destination of FDI in Europe

Excluding countries due to financial and tax benefits

## Number 1 destination of retirees in Europe

Just recently taking over of place of Portugal and France



**BRAZIL** 

HAMLIN & EARLY VARIETIES 23%

**PERA RIO 30%** 

**NATAL 11%** 

VALENCIA 35%



**SPAIN** 

NAVEL 7 %

NAVELINA + NAVELETE 68%

SALUSTIANA 9%

VALENCIA 15%

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Source: Fundecitrus

Source: Spain's Citrus Aforo



#### **SPANISH CITRUS ECOSYSTEM**

#### **PACKING HOUSES**









FRESH FRUIT / RETAIL







**ORCHARD'S** 





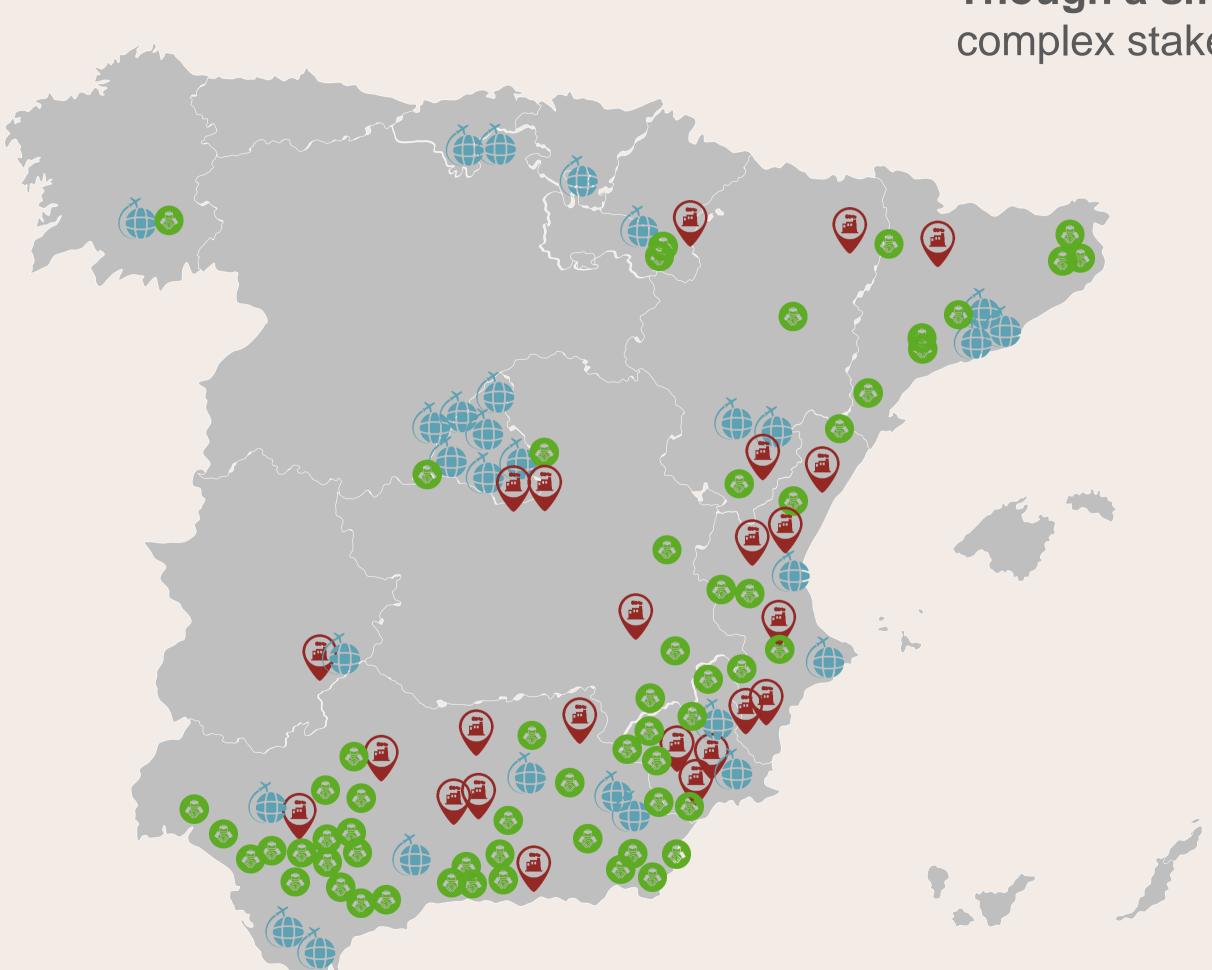
PROCESSING FACILITES



**JUICES AND INGREDIENTS** 



Though a small country, Spain has a complex stakeholders network!





**26 FACTORIES** 



**35 EXPORTERS** 



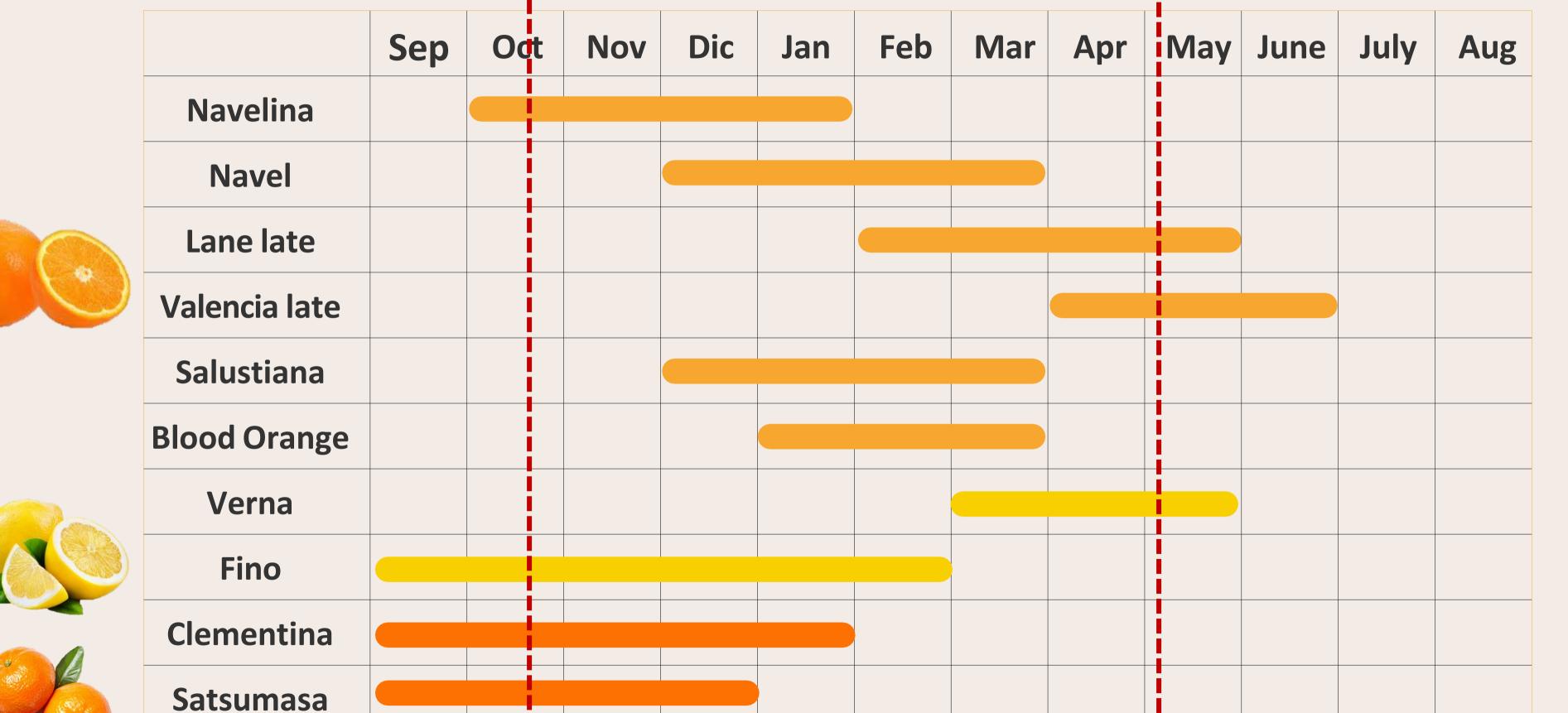
**450 PACKING HOUSES** 



90.000+ FARMS

#### **SPANISH CITRUS ECOSYSTEM**







# SPANISH CITRUS GLOBAL POSITION





**PROCESSING** 

4% Global Share



6<sup>th</sup> Biggest Global citrus producer



1st FRESH
21% Global Share

3rd

PROCESSING
17% Global Share





Source : Spain's Customs Department | Worlds Citrus Statistics 2023







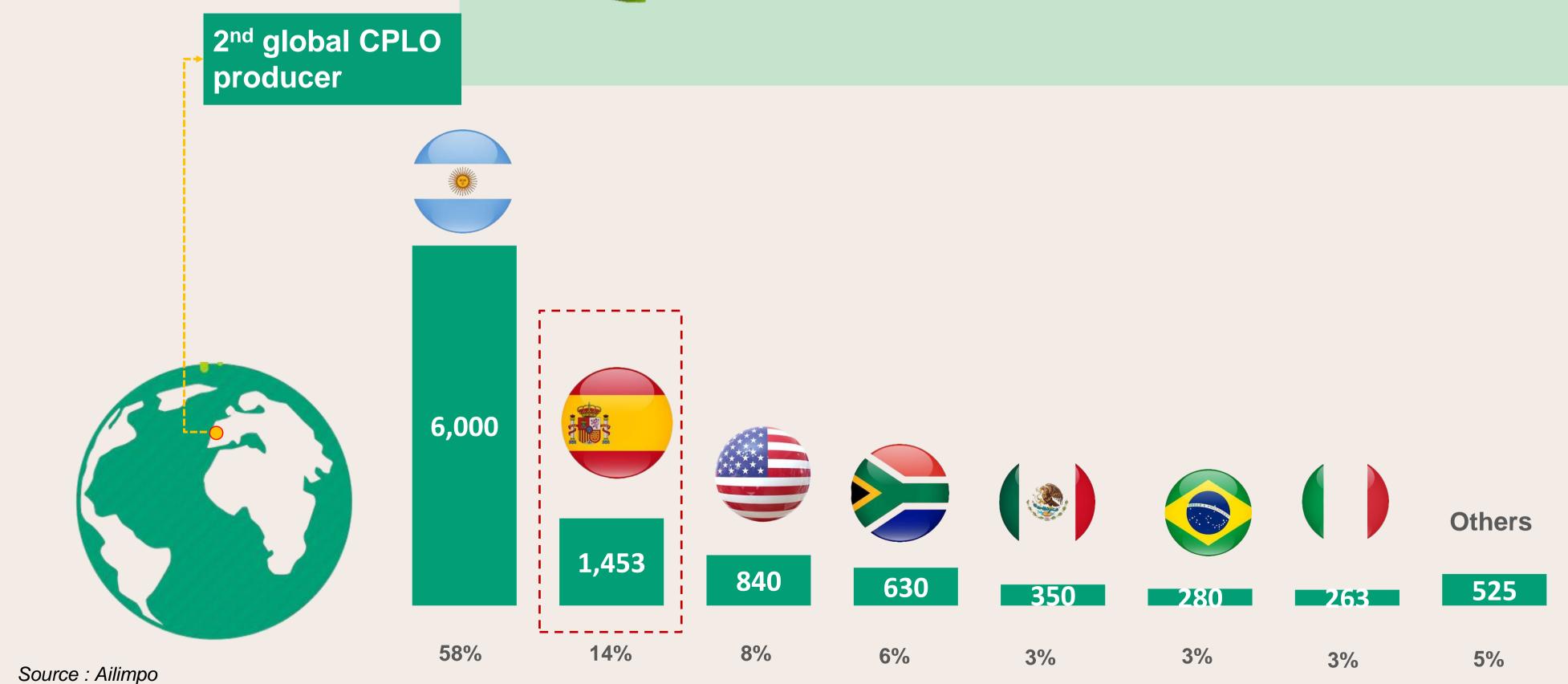




## SPANISH CITRUS GLOBAL POSITION



## ABSOLUTE LEADERSHIP IN EUROPEAN COLD PRESS LEMON OIL PRODUCTION



# SPANISH CITRUS GLOBAL POSITION

FRUIT&TECH



39% of the total global area available to organic lemon production is located in Spain!

40% of the total vol of Organic Lemons produced GLOBALLY

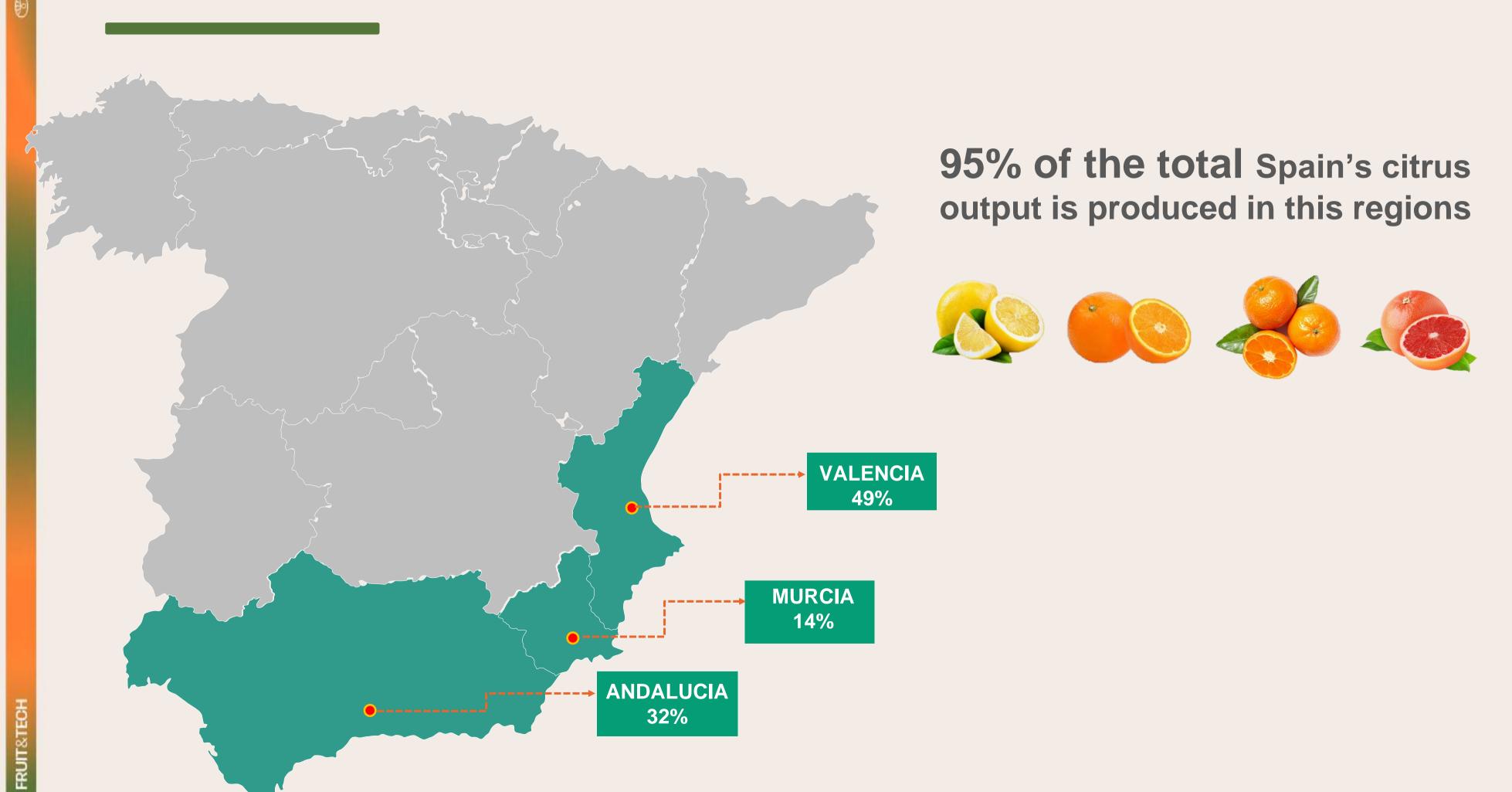


Source: Ailimpo

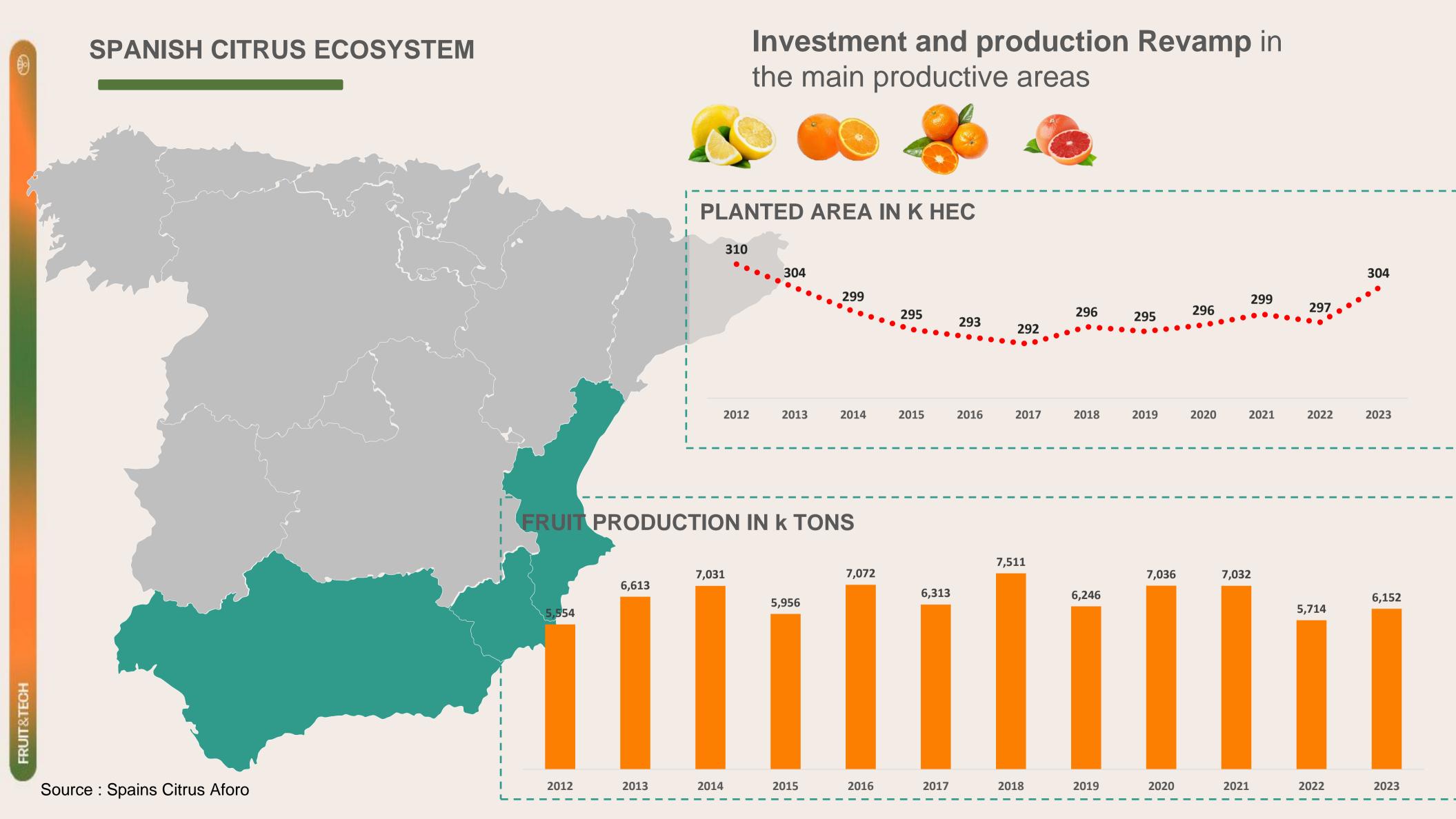








Source : Spains Citrus Aforo





## A giant is born: Bollo and Natural Fruit confirm their alliance



Revista Fruit Today 22/12/2022



The Valencian citrus fruit growing sector continues to become more concentrated with the announcement of the merging of Bollo and The Natural Fruit Company, a company partly owned by the investment funds Fremman and GPF Capital.





FRUIT TODAY EDITION 83 CITRUS FRUIT

## Citrus fruit: the most coveted area by investment funds



Fruit Today 24/12/2021





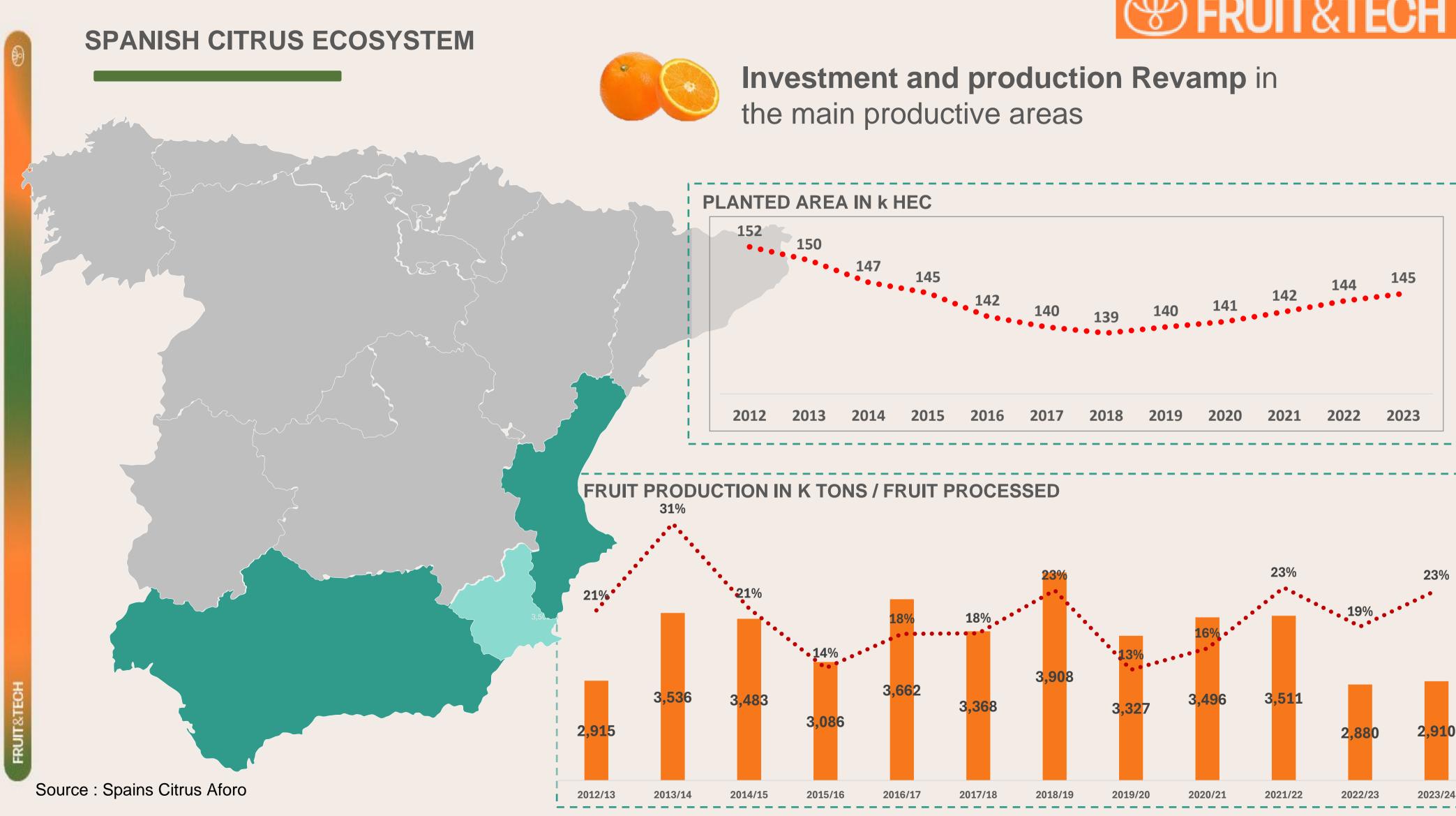
## June 20, 2022: Miura PortCo Citri&Co Strikes Land **Acquisition Partnership**

Business partners with PSP Investments to purchase, cultivate citrus land in Spain

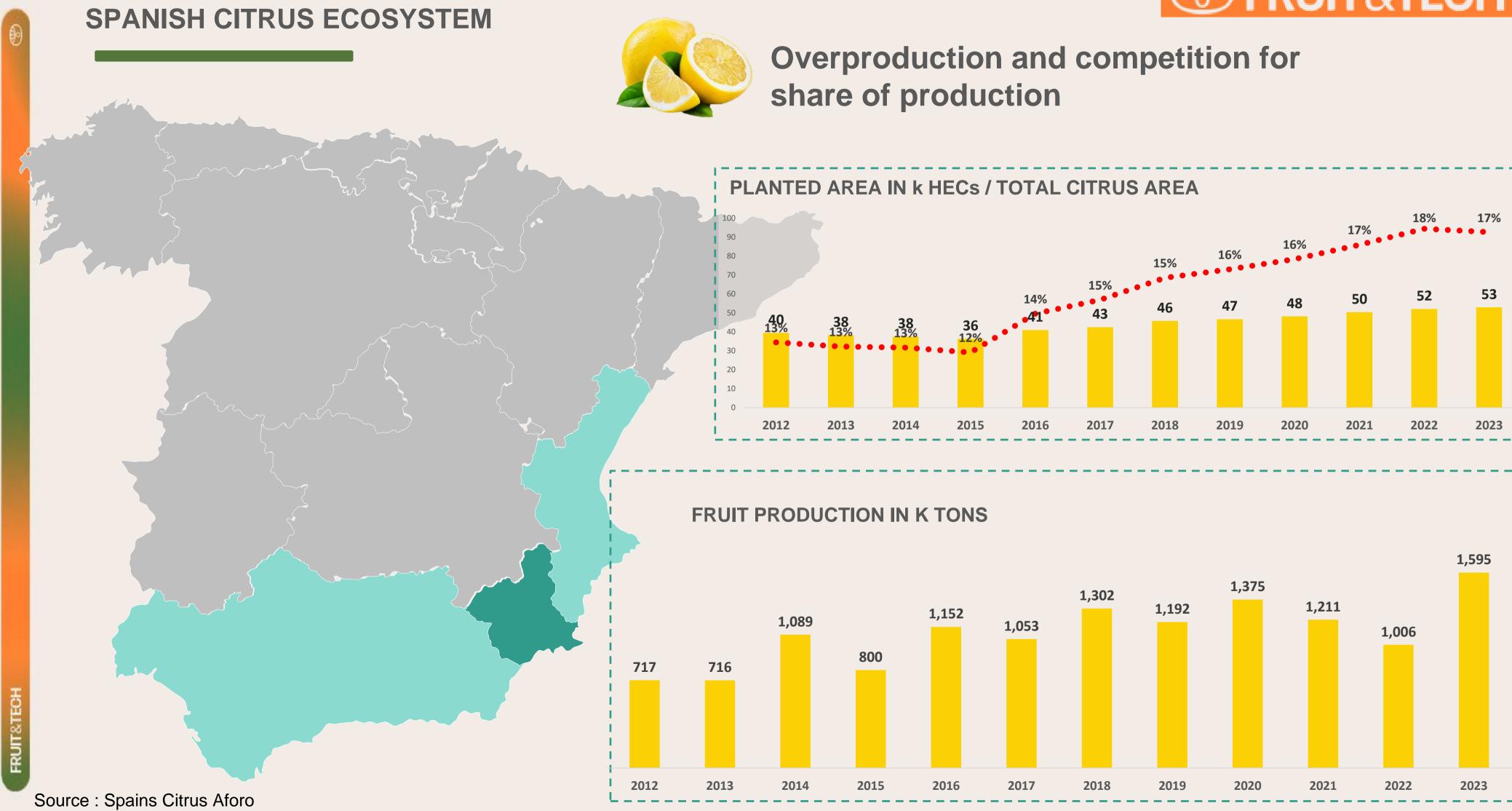
News & Trends / PE Weekly

June 20, 2022 / MMG

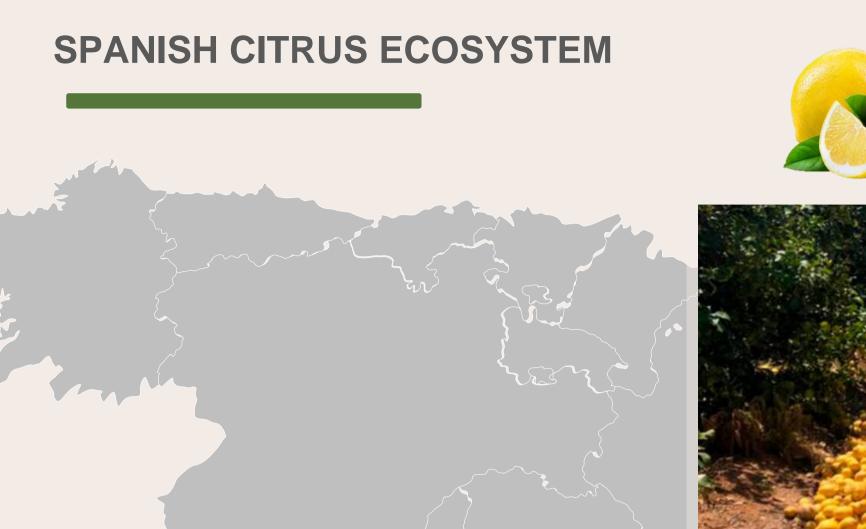












## Overproduction and competition for share of production









Source : Spains Citrus Aforo





# Overproduction and competition for share of production

	20/21	21/22	22/23	23/24
EXPORT EU + UK	699,356	637,423	587,373	640,000
<b>EXPORT OTHERS</b>	31,182	21,759	16,593	25,000
DOMESTIC C.	184,392	174,092	173,328	175,228
LOSSES	45,747	42,679	38,865	41,916
PROCESSING	414,838	319,692	211,667	361,937
TOTAL	1,375,515	1,205,945	1,027,826	1,242,181

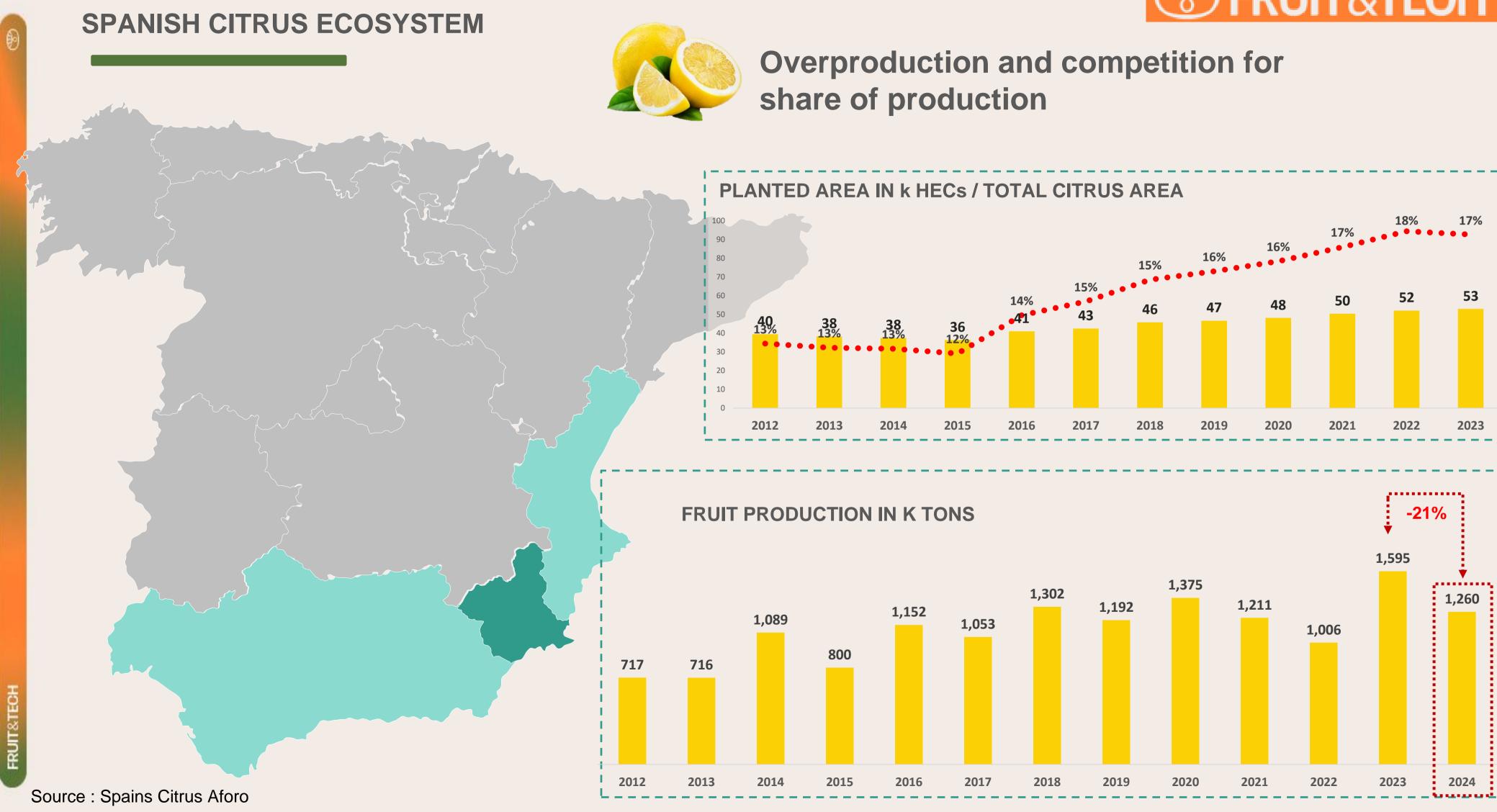
Not collected 353,000

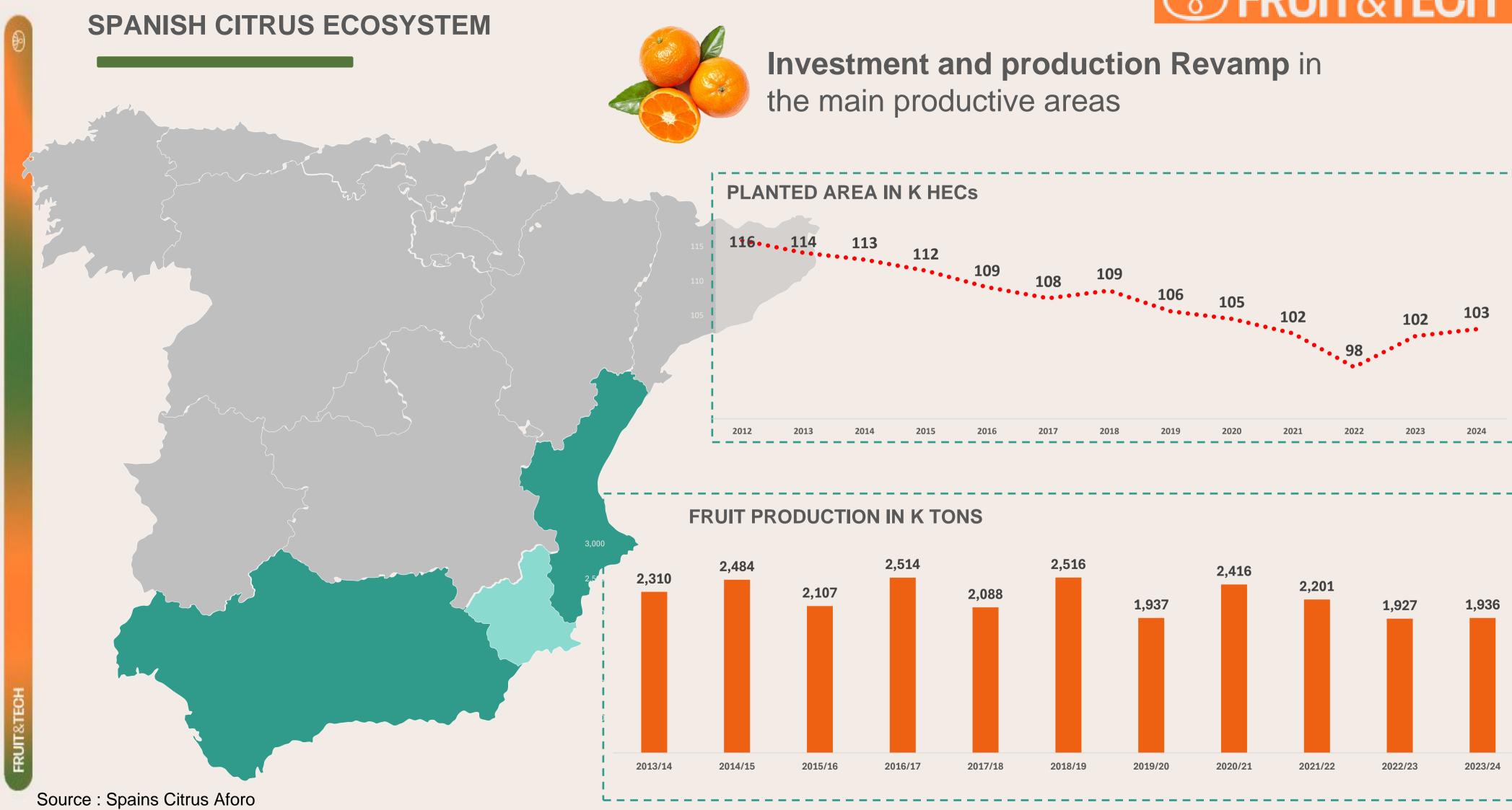
**TOTAL CROP SIZE** 1,595,181

Source : Spains Citrus Aforo

**SPANISH CITRUS ECOSYSTEM** 

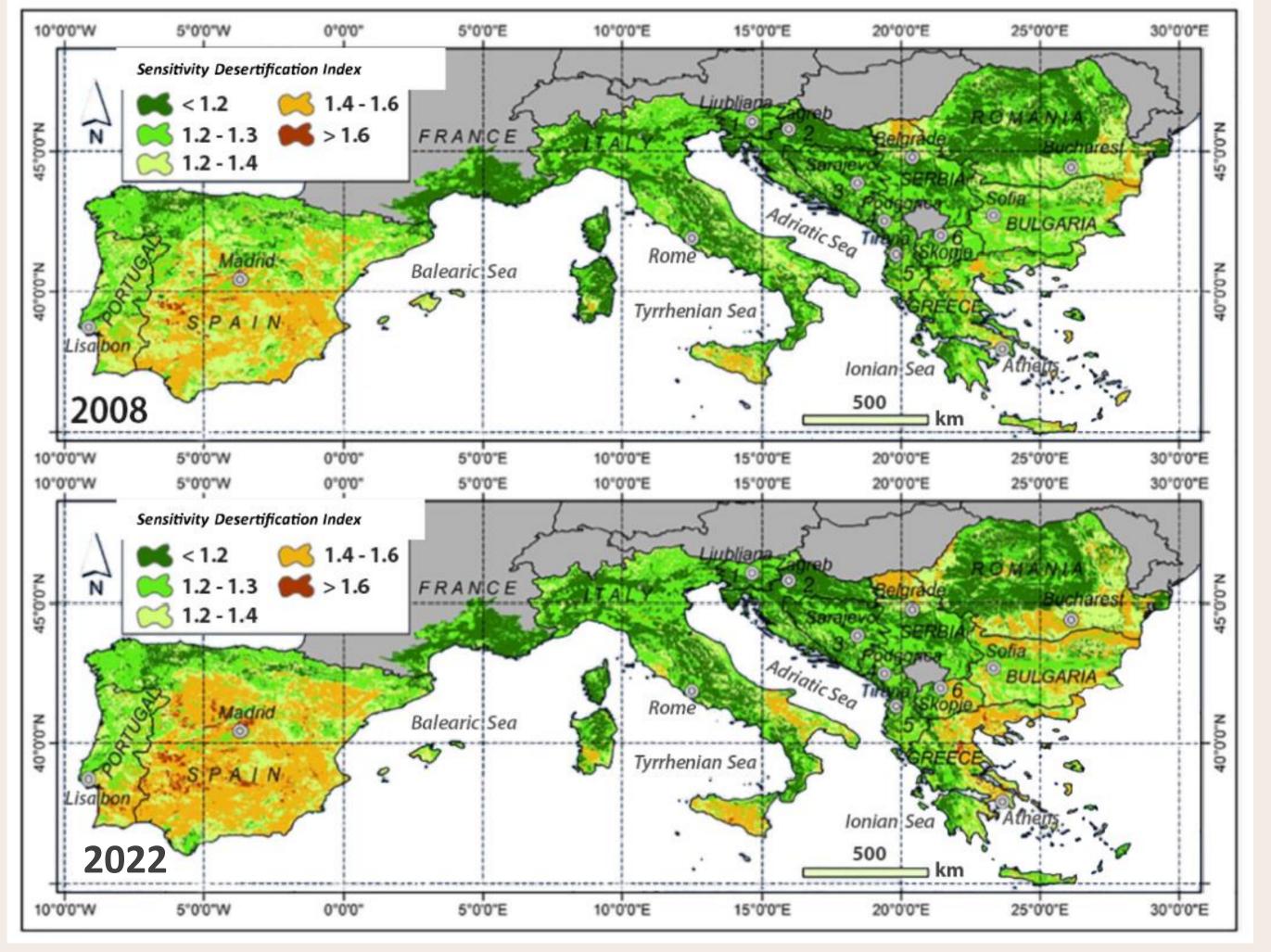






# Sensitivity Desertification Index in the EU for 2008 and 2022







#### **SPAIN'S WATERSHED**



















**ENTRAR** 

#### **ECONOMÍA**

# El 'milagro' de Murcia: solo dispone del 3% del agua pero genera el 25% de las exportaciones de frutas y verduras

The Murcian Miracle, : Having only 3% of the water available, but producing 25% of the fruit and vegetables exported

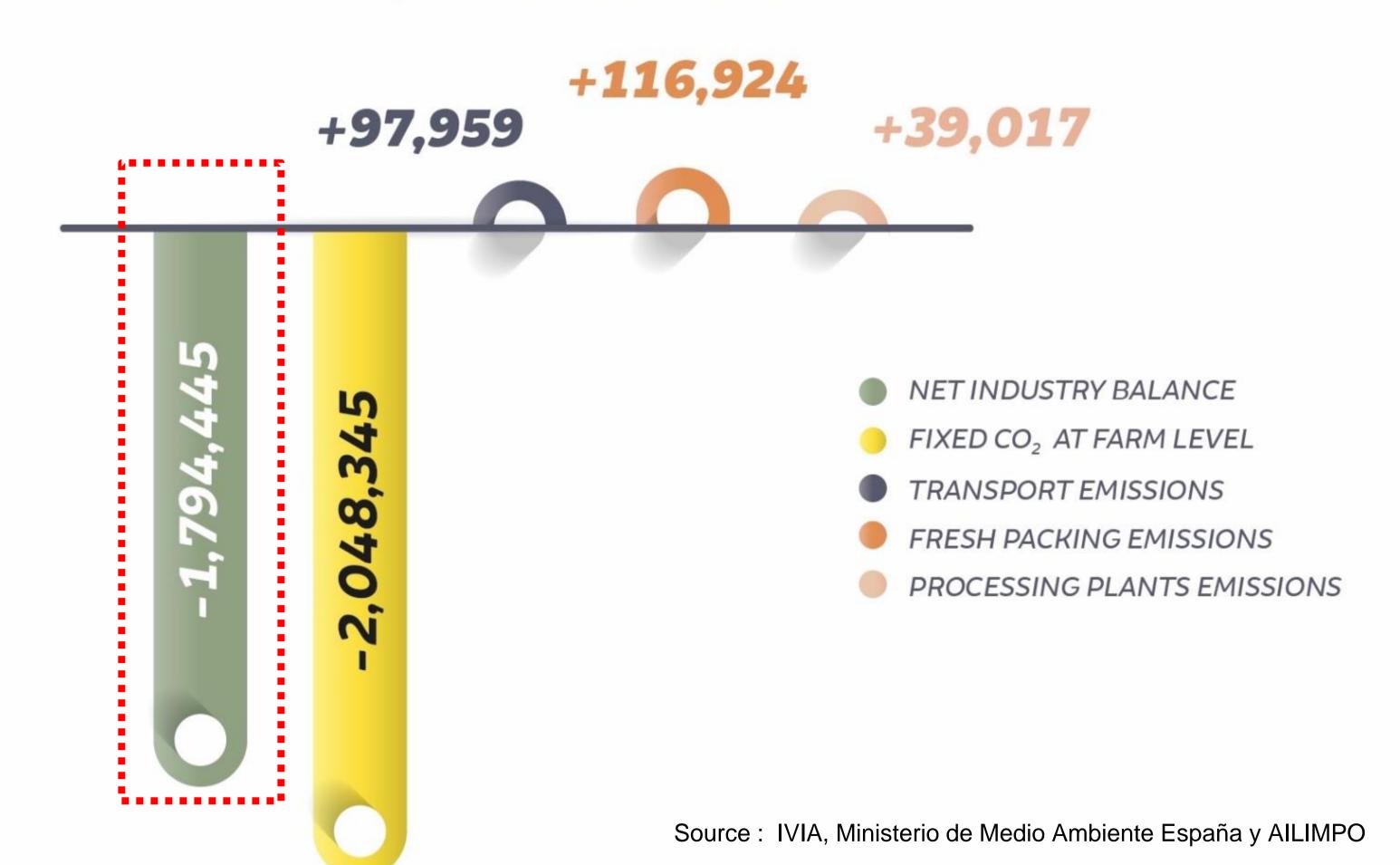
- La sequía aprieta en Cataluña por la falta de inversiones: en 2025 Barcelona no tendrá agua
- Mar Menor: un análisis científico culpa a las aguas residuales de la contaminación y exime a los agricultores



## SPANISH CITRUS INDUSTRY CARBON FOOTPRINT



Carbon footprint of the citrus sector (tonnes of  $CO_2$ )





#### CHALLENGES OF THE SPANISH CITRUS INDUSTRY











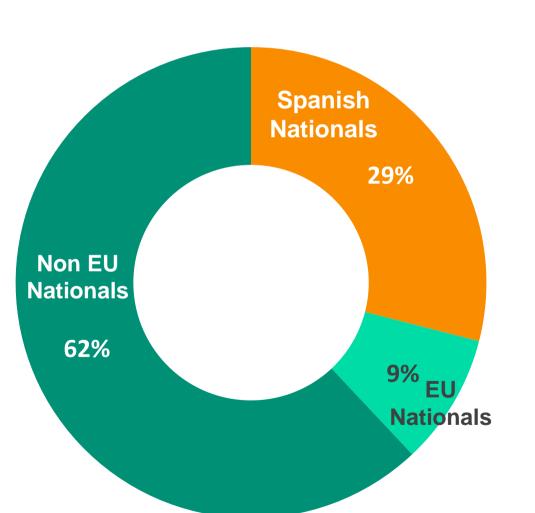
Full stream people attraction



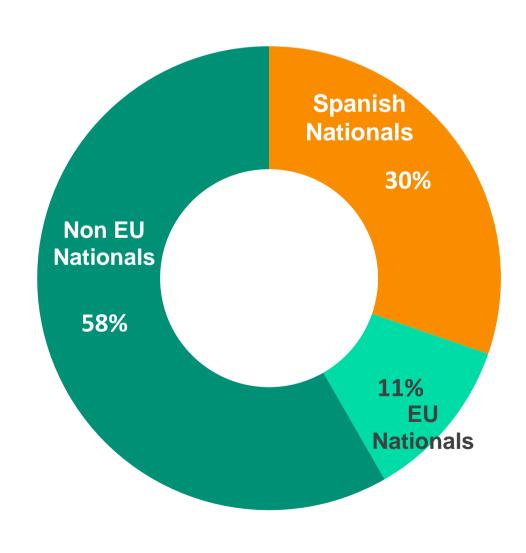
# 7 out of 10 worker in the Agriculture in Spain are foreigners

On average ~60% of the workers in the fields are Non EU Citzen





#### Catalonia



Data from December 2023

Chart: Guifré Jordan · Source: Spain's Social Security · Created with Datawrapper

#### CHALLENGES OF THE SPANISH CITRUS INDUSTRY





Full stream people attraction



Farmers and the Juice processing industry in Spain HAVE to follow UN's SDGs as well as the Social aspects mandatory by European Labor law

- Minimum vital income.
- Public pension system
- Unemployment benefits and subsidies
- Disability benefits
- Minimum interprofessional wage
- Public health system
- Universal education up to 16 years of age
- Labor reform and reduction of temporary employment
- Prevention of occupational hazards legislation
- Equality plans











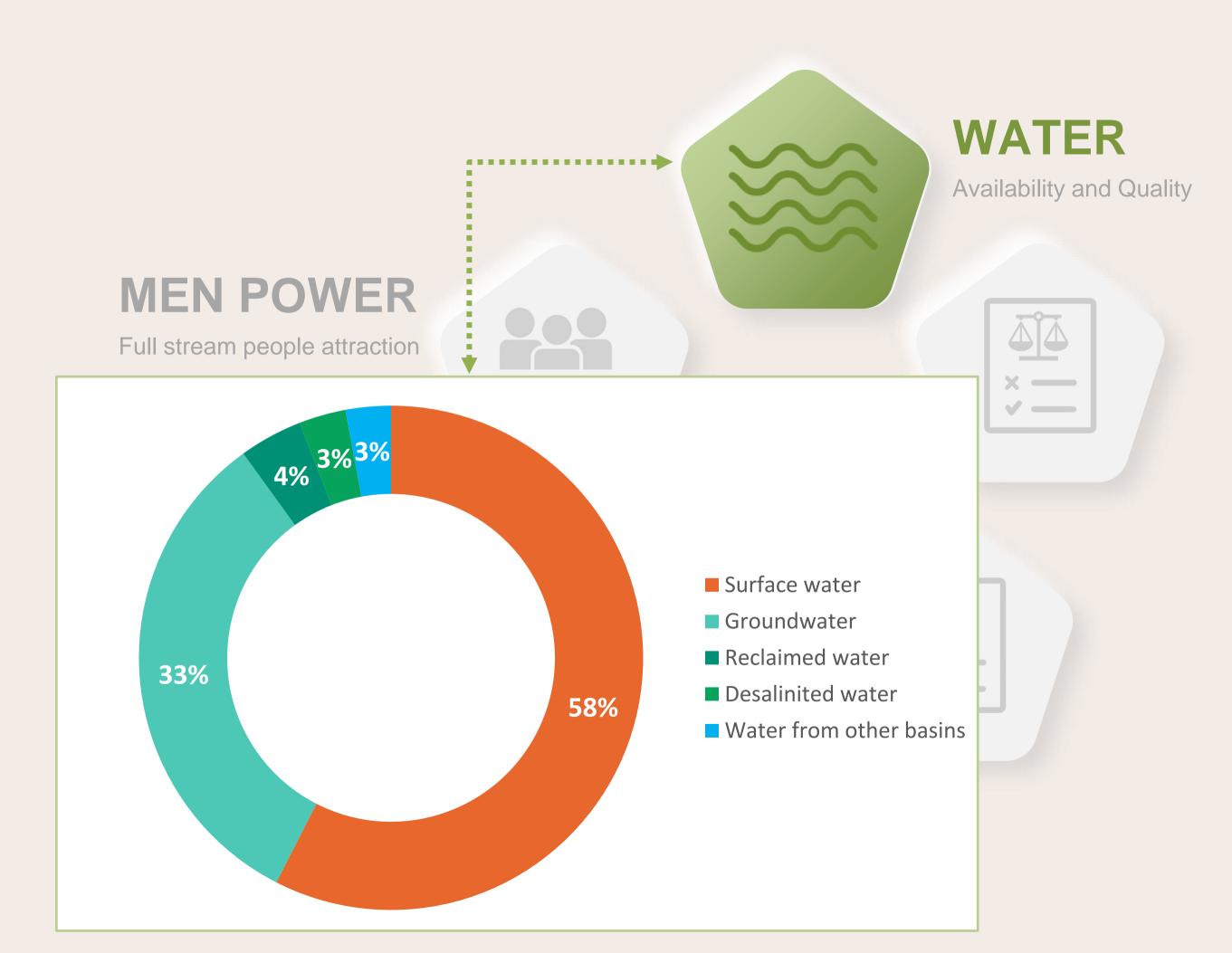




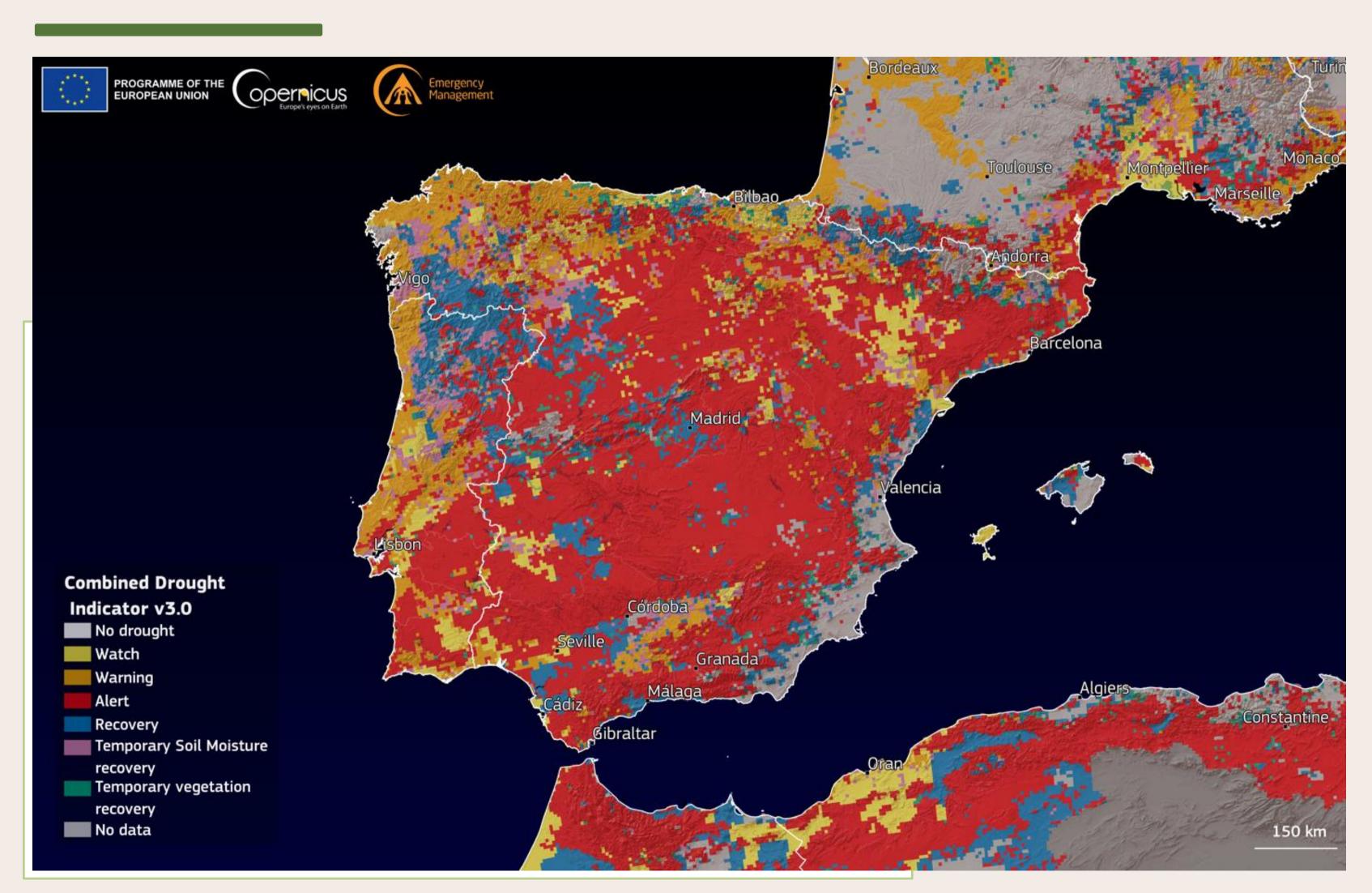






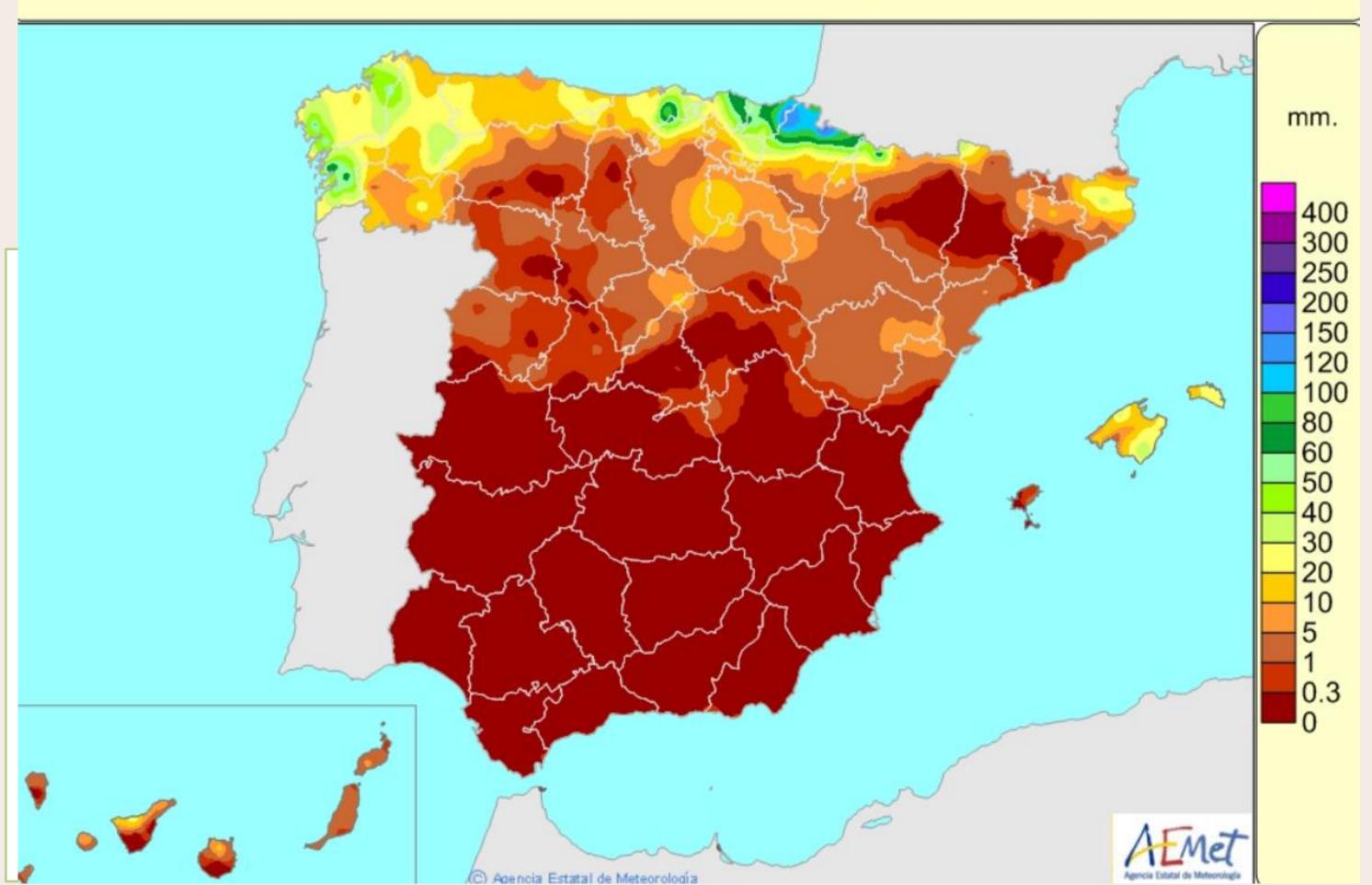








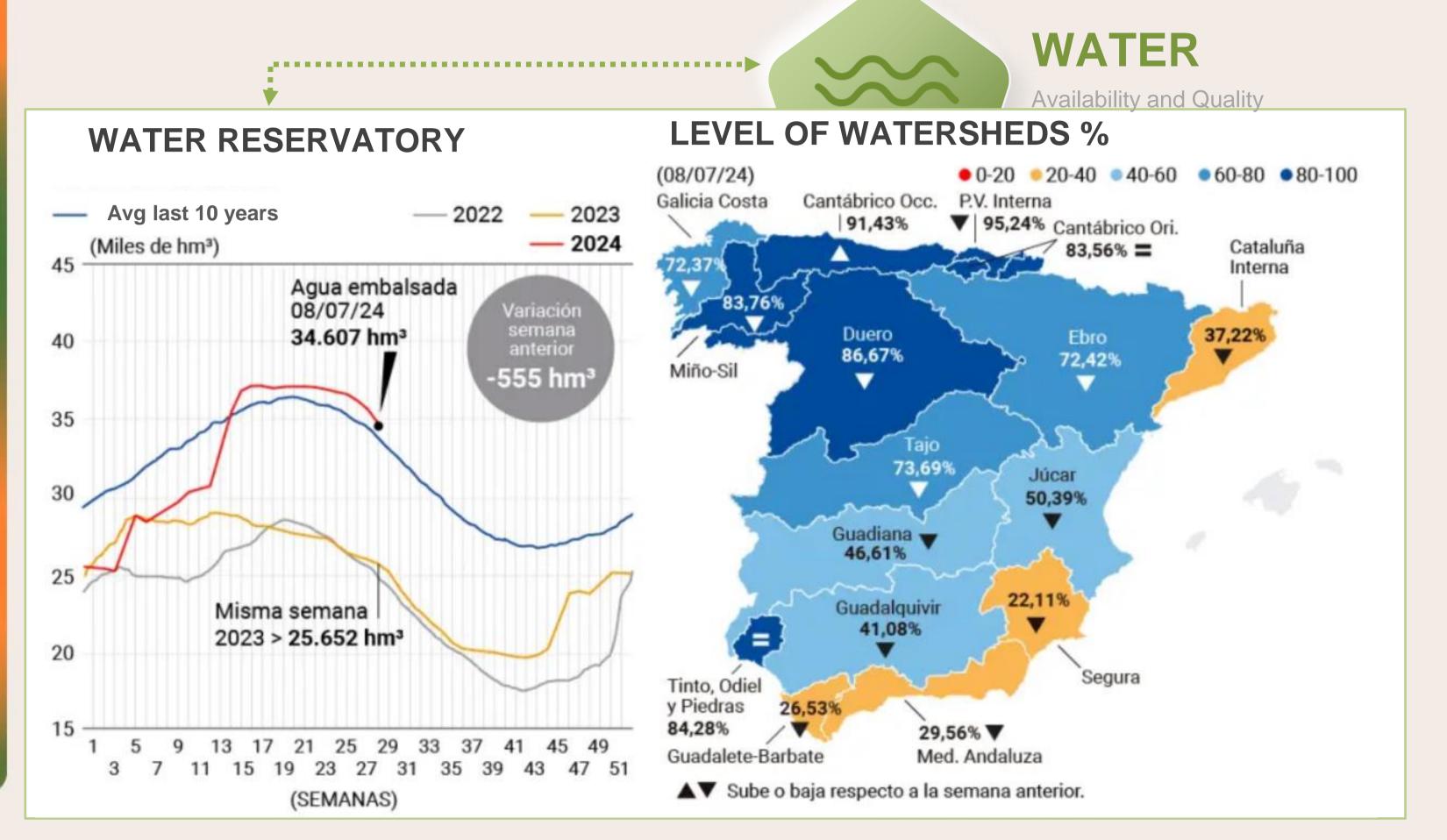
## Accumulated precipitation 01/04 a 17/04



Source : State Meteorological

Agency Aemet

















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Q Search



#### Food, Farming, Fisheries

#### Food Safety

Home Food V Animals V Plants V Horizontal topics V

Requirement	Description	Full Implementation
Reduction of Pesticide Use	Reduce the use and risk of chemical pesticides by 50%. Farmers worry about increased crop losses and a lack of effective alternatives for pest control.	By 2030
Reduction of Fertilizer Use	Decrease fertilizer use by 20%, especially nitrogen, raising concerns about reduced fruit yields and potential impacts on soil fertility.	By 2030
Mandatory Organic Farming Practices	Increase organic farming to cover at least 25% of total agricultural land, which could lead to higher production costs and lower yields in fruit farming.	By 2030
Protection of Biodiversity	Require farmers to allocate 10% of their land to biodiversity features, such as hedgerows or wildflower margins, reducing the area available for fruit cultivation.	By 2030
Mandatory Crop Rotation and Diversification	Enforce crop rotation and diversification to enhance soil health and reduce pest pressure, which can be challenging for fruit farmers with established orchards or vineyards.	By 2025
Phasing Out of Fossil Fuel- Dependent Equipment	Transition to electric or renewable-powered equipment, requiring significant investment and potentially higher operational costs for fruit producers.	Starting from 2027 onwards
Fair Labor Practices and Wages	Enforce higher labor standards, including fair wages and improved working conditions, increasing labor costs in fruit production, where margins are often slim.	By 2025
Enhanced Traceability and Reporting Requirements	Increase reporting and traceability requirements for environmental and social compliance, adding administrative burdens and costs for fruit farmers.	By 2024
Reduction of Plastic Use in Packaging	Limit or ban single-use plastics in packaging, including plastic wraps and containers used for fruit, leading to increased costs for alternative packaging materials.	By 2025























Full stream people attraction





Availability and Quality



## REGULATORY

Availability and Quality





**PLAGUES** 







HLB CITRUS CANKER







**CITRUS SPIDER** 

## **WATER**

Availability and Quality



## REGULATORY

Availability and Quality



## **PLAGUES**







HLB

**CITRUS CANKER** 





**CITRUS BLACKSPOT** 



**CITRUS SPIDER** 

## **WATER**

Availability and Quality



## REGULATORY

Availability and Quality



## **PLAGUES**

Though a vector (Citrus Triosa) was already found in the north of part, Spain is still a Greening Free country!!!



## WATER

Availability and Quality



## REGULATORY

Availability and Quality



## **PLAGUES**









Full stream people attraction





REGULATORY

Changes ahead

LOW COST AND NO COMPLIANT COUNTRIES



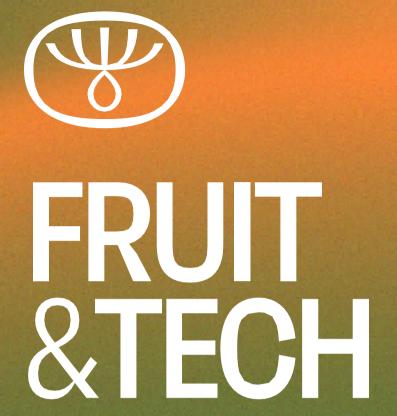


**PLAGUES** 

## SUMMARY



- SPAIN is one of worlds biggest players in the Citrus industry
- Fruits and and Juices in Spain are produced under World's HIGHEST requirements standards!
- Huge investment its been allocated to Citrus in Spain, which is leading to Quite change in the industry as well as a profissionalization of the sector
- SPAIN is a Phytosanitary Island, no major diseases or plagues (CBS, HLB, C Canker...) present
- 24/25 Citrus season is already on the move!!! We are ready for you!!!



# OBRIGADO!!!

My contacts:

in LinkedIn: Audi Bezerra

abezerra@fruitandtech.com

+34 676334292

