Prospects of the Spanish Citrus Industry

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Acknowledgments

Firstly, to the University of Florida and all the people involved in the organization of this Congress.

Secondly, to recognize the Ailimpo Association for providing relevant data from the sector and contributing to the transparency and professionalization of the Spanish Citrus segment.

To Riverbend and all the workers we are, for making possible to stay here today.
Who we are: Riverbend España

The essence of the Spanish Lemon

1989

2022
Objectives

To describe the evolution of the Citrus Industry in parallel with the fresh and agricultural sector.

To present the pros and cons of the geographical location of the Spanish Citrus Industry.
Near working areas
Water
Carbon footprint
European Union
Green deal
Lemon production in the world

2021

<table>
<thead>
<tr>
<th>Country</th>
<th>Fresh</th>
<th>Processed</th>
<th>Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>300,000</td>
<td>1,200,000</td>
<td>1,500,000</td>
</tr>
<tr>
<td>Spain</td>
<td>960,000</td>
<td>415,000</td>
<td>1,375,000</td>
</tr>
<tr>
<td>USA</td>
<td>595,000</td>
<td>240,000</td>
<td>853,000</td>
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<tr>
<td>Turkey</td>
<td>895,000</td>
<td>50,000</td>
<td>945,000</td>
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<tr>
<td>Italy</td>
<td>345,000</td>
<td>75,000</td>
<td>420,000</td>
</tr>
<tr>
<td>RSA</td>
<td>470,000</td>
<td>180,000</td>
<td>650,000</td>
</tr>
<tr>
<td>Others</td>
<td>650,000</td>
<td>240,000</td>
<td>890,000</td>
</tr>
</tbody>
</table>
ES Citrus: Main Focus >> Fresh / Processing is Subsidiary

26 citrus processors in Spain but...

13 of them are making 85% and the other 13 are making just 15% of the volumes
Spanish lemon
in the world

Spain
2nd World producer
1,375,000 tonnes

World total
6,615,000 tonnes

Fresh
Spain
22% of world output
960,000 tonnes

Processing
Spain
17% of world output
415,000 tonnes
SPAIN: Where the Old and the New Come Together

“Traditional”

“Technified and Modern”
Spanish Lemon Production Trend
Number of lemon seedlings per year and variety
FORECAST OF THE PRODUCTION POTENTIAL OF THE LEMON IN SPAIN IN THE CROP 2025/2026

The production in 2025/26 could reach 1,772,609 metric tons
Lemon production covers 49,000 ha in Spain.

Approximately 13,000,000 lemon trees make up a big forest.

Production in Spain by Region:

- **Murcia**: 55% (750,000 tonnes)
- **Valencia**: 30% (415,000 tonnes)
- **Andalusia**: 15% (210,000 tonnes)
ORGANIC LEMONS IN SPAIN

- Total Lemon Area in Spain: 8,300 ha
- 17% of the total Lemon Area in Spain is Organic
- Organic Lemon Production: 172,643 tm

Spanish Organic Lemon Area Evolution (ha):
- 2012: 764
- 2020: 4,907

- 3,393 ha: Fully Certified Area
- 944 ha: Area in conversion period

Organic Lemon Area in Spain: 2020
ORGANIC LEMON >> LEADING A NEW NICHE MARKET

Organic lemon area in Spain (2012 to 2020)

SPAIN >> KEY SUPPLIER WORLDWIDE +170,000 TONS
Conclusion

The Spanish Citrus Industry has a continuous and stable access to quality organic and conventional fruit. There is a complementary business with the packing houses — WIN/WIN

Sustainable supply chain: Growers, Packing Houses and Industry.
Conclusion

Sustained Development of the Organic fruit, with a demanding and growing market.

Professionalization of everyone involved in the distribution channel: Agriculture, Packing Houses, Industry and Sectoral Organizations like Ailimpo.

What benefits the lemon sector, also benefits the planet
We are small but we can help. It is our responsibility
Thank you all for your attention