SPAIN José Antonio García

2 june 2012

THE SPANISH CITRUS SECTOR AN OVERVIEW

- The Spanish CITRUS Figures
- The Structure of the Spanish Citrus Sector
- The Citrus Business in Spain
- Subsidies granted by the EU
- A global perspective: we are not alone

ORGANISING THE SECTOR: THE INTERPROFESSIONAL MODEL

ΟΡΓΑΝΩΝΟΝΤΑΣ ΤΟΝ ΤΟΜΕΑ: ΤΟ ΔΙΕΠΑΓΓΕΛΜΑΤΙΚΟ ΜΟΝΤΕΛΟ

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50% **PRODUCTION**

Asociación Agraria Jovenes Agricultores · COAG · UPA · cooperativas agro-alimentarias España

50% **TRADE**

cooperativas agro-alimentarias España · CGC · ASOCITHADER Asociación Citrícola Thader · AIZCE

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ΠΑΡΑΓΩΓΗ	ΣΥΣΚΕΥΑΣΙΑ	ΜΕΤΑΠΟΙΗΣΗ
PRODUCTION	PACKING	PROCESSING
ΠΑΝΩ ΑΠΟ 12.000 ΓΕΩΡΓΟΙ	90 ΣΥΣΚΕΥΑΣΤΗΡΙΑ	14 ΧΥΜΟΠΟΙΕΙΑ
OVER 12.000 GROWERS	90 PACKING HOUSES	14 PROCESSING PLANTS

Representing (% of the total of Spain)

85 %	90 %	100 %

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What can an INTERPROFESSIONAL do: IMPROVING THE F&V CHAIN

ΤΟ ΜΠΟΡΕΙ ΝΑ ΚΑΝΕΙ ΜΙΑ ΔΙΕΠΑΓΓΕΛΜΑΤΙΚΗ: ΝΑ ΒΕΛΤΙΩΣΕΙ ΤΗΝ ΑΛΥΣΙΔΑ ΤΩΝ ΦΡΟΥΤΟΛΑΧΑΝΙΚΩΝ

BOOSTING THE ROLE OF INTERBRANCHES

ΕΝΙΣΧΥΣΗ ΤΟΥ ΡΟΛΟΥ ΤΩΝ ΕΝΔΙΑΜΕΣΩΝ ΚΛΑΔΩΝ

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ΔΙΕΠΑΓΓΕΛΜΑΤΙΚΗ ΦΡΟΥΤΟΛΑΧΑΝΙΚΩΝ

ACTIVITIES AND OBJECTIVES

ΔΡΑΣΤΗΡΙΟΤΗΤΕΣ & ΣΚΟΠΟΙ/ΑΝΤΙΚΕΙΜΕΝΑ

✔ **(a)production and market reporting**

ΠΑΡΑΚΟΛΟΥΘΗΣΗ ΠΑΡΑΓΩΓΗΣ ΚΑΙ ΑΓΟΡΑΣ

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	(b) stricter production rules than those laid down in Union or national rules **ΑΥΣΤΗΡΟΤΕΡΟΙ ΚΑΝΟΝΕΣ ΠΑΡΑΓΩΓΗΣ ΑΠΟ ΑΥΤΟΥΣ ΤΗΣ Ε.Ε. ΚΑΙ ΤΟΥ ΚΡΑΤΟΣ**

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✔	**(c) drawing up of standard contracts which are compatible with Union rules.** **ΣΧΕΔΙΑΣΜΟΣ ΜΙΑΣ ΤΥΠΙΚΗΣ ΣΥΜΒΑΣΗΣ ΠΟΥ ΕΙΝΑΙ ΣΥΜΒΑΤΗ ΜΕ ΤΟΥΣ ΚΑΝΟΝΕΣ ΤΗΣ Ε.Ε.**

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	(d) rules on marketing; **ΚΑΝΟΝΕΣ ΤΟ ΜΑΡΚΕΤΙΝΓΚ**

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✔	**(e) rules on protecting the environment** **ΚΑΝΟΝΕΣ ΓΙΑ ΤΗΝ ΠΡΟΣΤΑΣΙΑ ΤΟΥ ΠΕΡΙΒΑΛΛΟΝΤΟΣ**

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ΔΙΕΠΑΓΓΕΛΜΑΤΙΚΗ ΦΡΟΥΤΟΛΑΧΑΝΙΚΩΝ

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✔	**(f) measures to promote and exploit the potential of products** **ΜΕΤΡΑ ΠΡΟΑΓΩΓΗΣ ΚΑΙ ΔΙΕΡΕΥΝΗΣΗΣ ΣΤΩΝ ΔΥΝΑΤΟΤΗΤΩΝ ΤΩΝ ΠΡΟΙΟΝΤΩΝ**

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✔	**(g) measures to protect organic farming as well as designations of origin, quality labels and geographical indications** **ΜΕΤΡΑ ΠΡΟΣΤΑΣΙΑΣ:** **ΒΙΟΛΟΓΙΚΗΣ ΓΕΩΡΓΙΑΣ - Π.Ο.Π. - Π.Γ.Ε. – ΣΥΣΤΗΜΑΤΑ ΠΟΙΟΤΗΤΑΣ**

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✔ **(h) research to add value to the products, in particular through new uses which do not pose a threat to public health**

ΕΡΕΥΝΑ ΓΙΑ ΤΗΝ ΠΡΟΣΘΕΣΗ ΑΞΙΑΣ ΤΟ ΠΡΟΙΟΝ ΜΕΣΑ ΑΠΟ ΝΕΕΣ ΧΡΗΣΕΙΣ ΠΟΥ ΔΕΝ ΔΗΜΙΟΥΓΟΥΝ ΚΙΝΔΥΝΟ ΣΤΗΝ ΔΗΜΟΣΙΑ ΥΓΕΙΑ

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✔ **(i) studies to improve the quality of products**

ΜΕΛΕΤΕΣ ΒΕΛΤΙΩΣΗ ΠΟΙΟΤΗΤΑΣ ΤΩΝ ΠΡΟΙΟΝΤΩΝ

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(j) research, in particular into methods of cultivation permitting reduced use of plant protection or animal health products and guaranteeing conservation of the soil and the environment

ΕΡΕΥΝΑ ΓΙΑ ΚΑΛΛΙΕΡΓΗΤΙΚΕΣ ΜΕΘΟΔΟΥΣ ΜΕΙΩΜΕΝΗΣ ΧΡΗΣΗΣ ΑΓΡΟΧΗΜΙΚΩΝ ΠΟΥ ΕΓΓΥΩΝΤΑΙ ΤΗΝ ΠΡΟΣΤΑΣΙΑ ΕΔΑΦΟΥΣ & ΠΕΡΙΒΑΛΛΟΝΤΟΣ

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(k) definition of minimum qualities and definition of minimum standards of packing and presentation

ΚΑΘΟΡΙΣΜΟΣ ΕΛΑΧΙΣΤΩΝ ΠΟΙΟΤΙΚΩΝ ΧΑΡΑΚΤΗΡΙΣΤΙΚΩΝ & ΕΛΑΧΙΣΤΩΝ ΠΡΟΤΥΠΩΝ ΣΥΣΚΕΥΑΣΙΑΣ - ΠΑΡΟΥΣΙΑΣΗΣ

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(l) use of certified seed and monitoring of product quality.

ΧΡΗΣΗ ΠΙΣΤΟΠΟΙΗΜΕΝΩΝ ΣΠΟΡΩΝ ΚΑΙ ΠΑΡΑΚΟΛΟΥΘΗΣΗ ΠΟΙΟΤΗΤΑΣ ΠΡΟΙΟΝΤΩΝ

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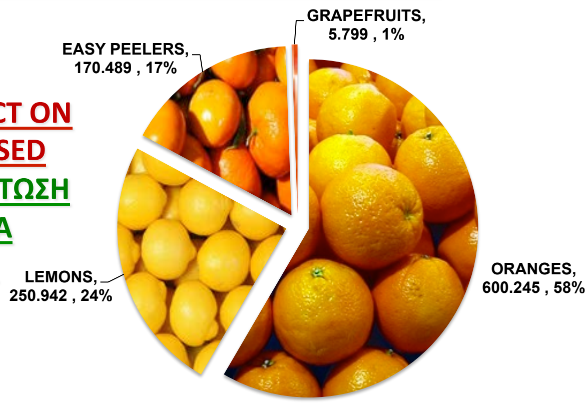
CITRUS SENT TO PROCESSING

ΕΣΠΕΡΙΔΟΕΙΔΗ ΠΟΥ ΟΔΗΓΟΥΝΤΑΙ ΣΤΗ ΜΕΤΑΠΟΙΗΣΗΣ

AVERAGE LAST 3 SEASONS - Μ.Ο. 3 ΕΤΩΝ

NO NEGATIVE IMPACT ON VOLUMES PROCESSED

ΚΑΜΙΑ ΘΕΤΙΚΗ ΕΠΙΠΤΩΣΗ ΣΤΗΝ ΠΟΣΟΤΗΤΑ ΜΕΤΑΠΟΙΗΣΗΣ



CITRUS SENT TO PROCESSING

ΕΣΠΕΡΙΔΟΕΙΔΗ ΠΟΥ ΟΔΗΓΟΥΝΤΑΙ ΣΤΗ ΜΕΤΑΠΟΙΗΣΗ

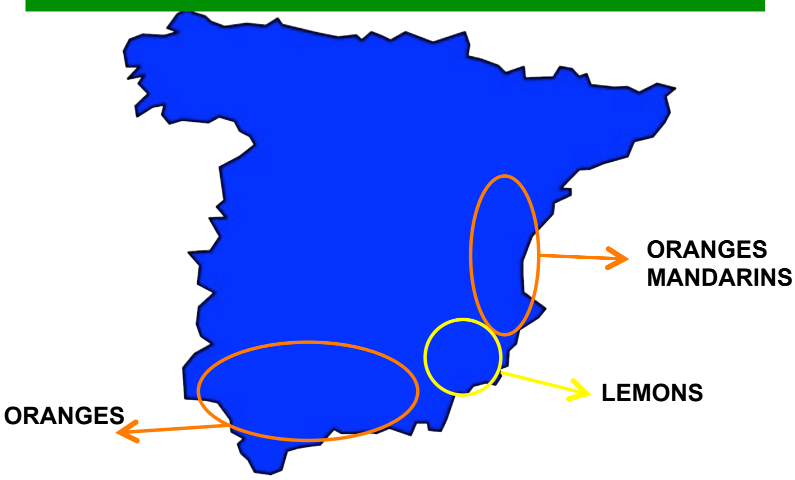
DECOUPLED AIDS		
	Total amount	€/ ha
Oranges and Easy Peelers	80.333.000 €	568,80 €/ha
Lemons	13.333.000 €	1.013,18 €/ha
Grapefruits	67.000 €	60,82 €/ha

57 ευρώ/στρ

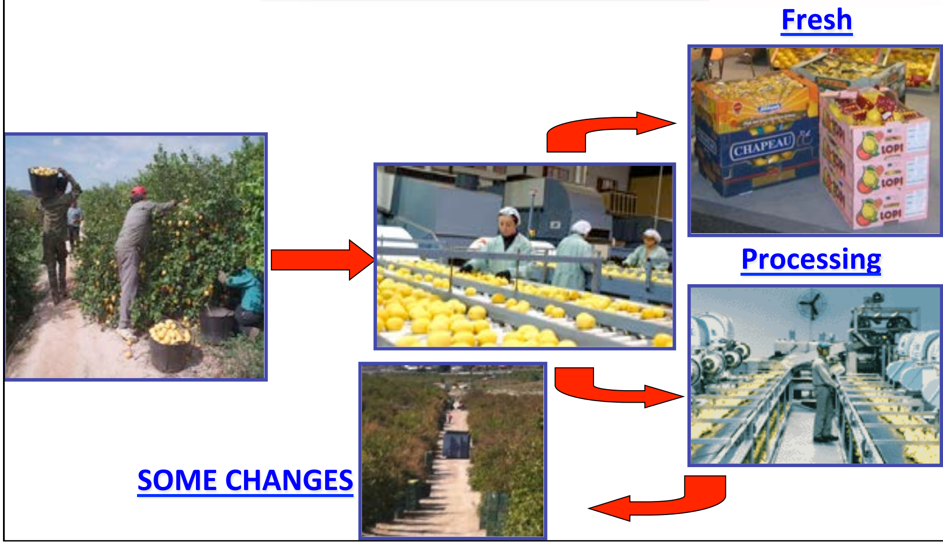
ΑΠΟΣΥΝΔΕΔΕΜΕΝΗ ΕΝΙΣΧΥΣΗ		
	Total amount	€/ ha
Πορτοκάλια & μανταρίνια	80.333.000 €	568,80 €/ha
Lemons	13.333.000 €	1.013,18 €/ha
Grapefruits	67.000 €	60,82 €/ha

CITRUS PRODUCTION IN SPAIN

Η ΠΑΡΑΓΩΓΗ ΕΣΠΕΡΙΔΟΕΙΔΩΝ ΣΤΗΝ ΙΣΠΑΝΙΑ



How we deal with citrus in Spain?



CITRUS BUSINESS IN SPAIN. SOME FIGURES

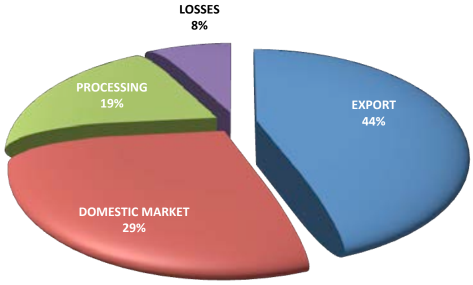
SURFACE	290.000	Has.
TOTAL PRODUCTION	6.700	Million Tons.
PACKING HOUSES	500	
FRESH EXPORT TURNOVER	2.400	Million €
PROCESSING PLANTS	31	
DIRECT LABOUR	280.000	Persons



ΙΣΠΑΝΙΚΑ ΠΟΡΤΟΚΑΛΙΑ

SPANISH ORANGES (tons)

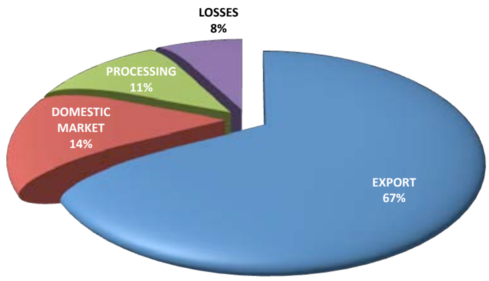
	07/08	08/09	09/10	10/11
EXPORT	1.266.514	1.419.392	1.294.631	1.623.538
DOMESTIC MARKET	872.902	900.137	986.192	904.963
PROCESSING	508.728	880.000	320.000	690.000
LOSSES	202.205	348.628	227.441	200.000
PRODUCTION	**2.850.349**	**3.548.157**	**2.828.264**	**3.418.501**



ΙΣΠΑΝΙΚΑ ΜΑΝΤΑΡΙΝΙΑ

SPANISH EASY PEELERS (tons)

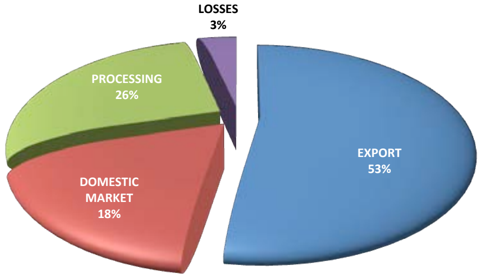
	07/08	08/09	09/10	10/11
EXPORT	1.417.218	1.427.299	1.362.840	1.623.538
DOMESTIC MARKET	283.652	298.299	317.384	304.909
PROCESSING	260.020	237.000	215.000	265.000
LOSSES	118.723	269.486	128.475	150.000
PRODUCTION	**2.079.613**	**2.232.084**	**2.023.699**	**2.343.447**



ΙΣΠΑΝΙΚΑ ΛΕΜΟΝΙΑ

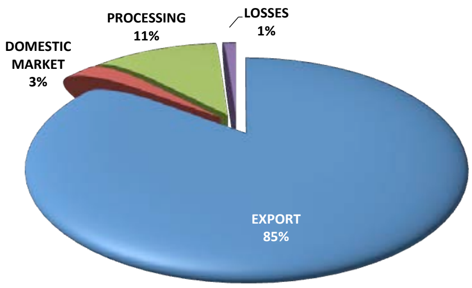
SPANISH LEMONS (tons)

	07/08	08/09	09/10	10/11
EXPORT	314.167	478.385	377.875	464.627
DOMESTIC MARKET	150.000	132.000	136.800	136.800
PROCESSING	64.817	304.658	142.089	299.014
LOSSES	23.208	30.519	25.734	30.071
PRODUCTION	552.192	945.562	682.498	930.512



SPANISH GRAPEFRUITS (tons)

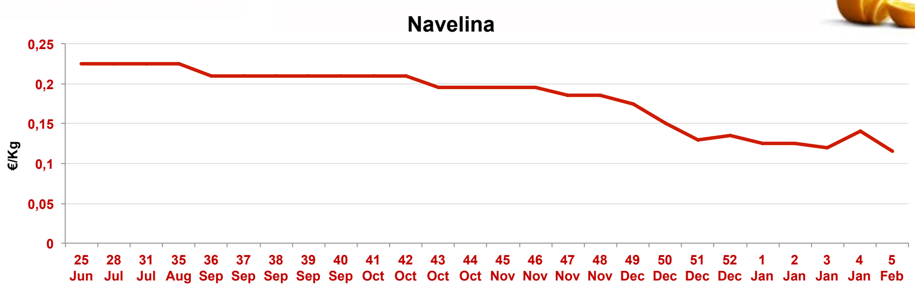
	07/08	08/09	09/10	10/11
EXPORT	40.000	38.000	46.000	53.000
DOMESTIC MARKET	1.500	1.000	1.600	1.000
PROCESSING	5.500	4.000	4.900	8.500
LOSSES	2.000	100	100	200
PRODUCTION	49.000	43.100	52.600	62.700

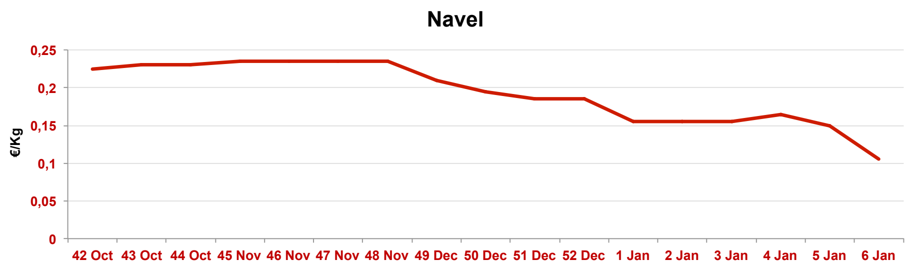


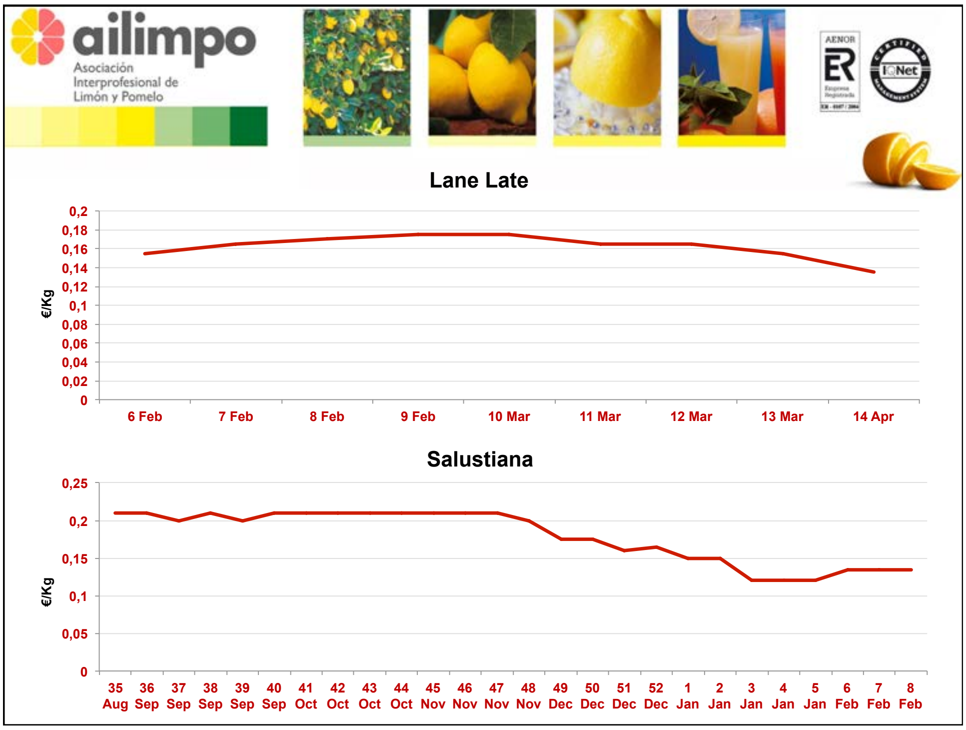
Production prices in Spain

Season 2011/2012 on the tree without harvesting (Except Processing)

WHAT IS A "LONJA"?



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AENOR
ER
IQNet
Lane Late
€/Kg
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8 Feb
9 Feb
10 Mar
11 Mar
12 Mar
13 Mar
14 Apr
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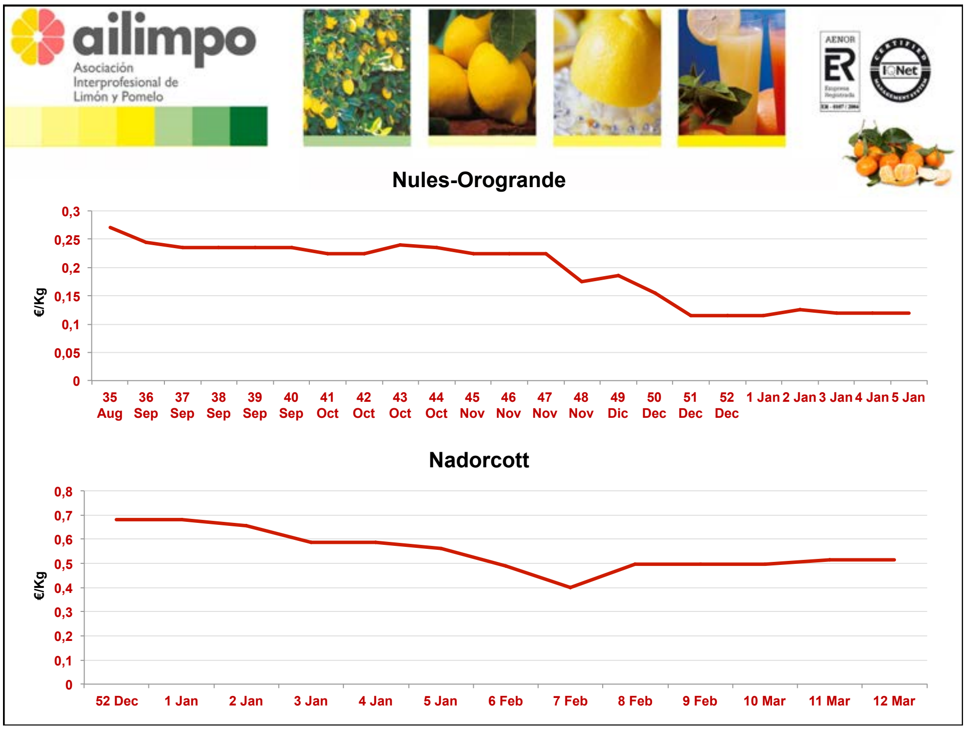
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Asociación Interprofesional de Limón y Pomelo
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11 Mar
12 Mar

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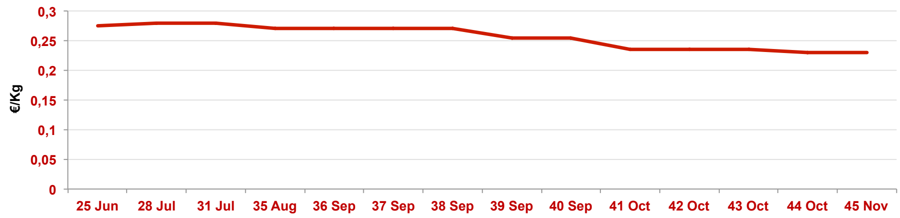
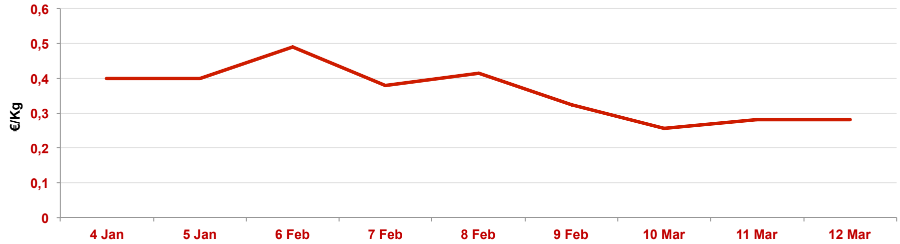
Marisol



Fortune



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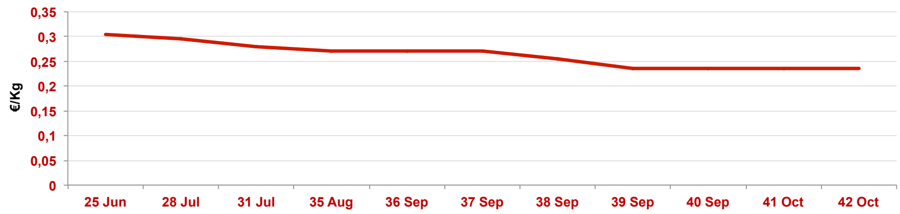
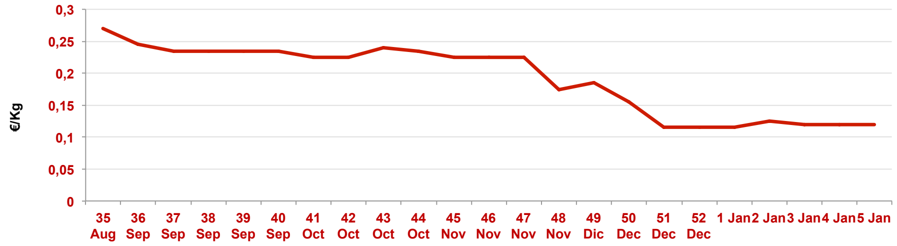
Okitsu



Ortanique



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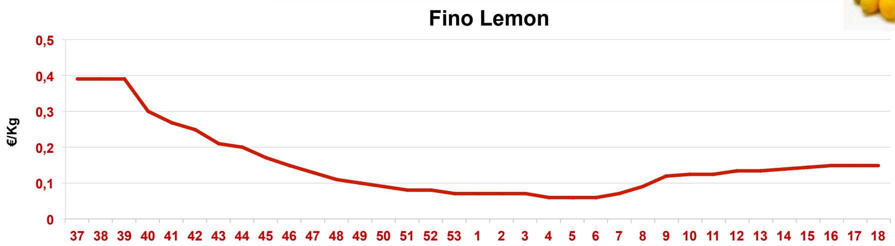

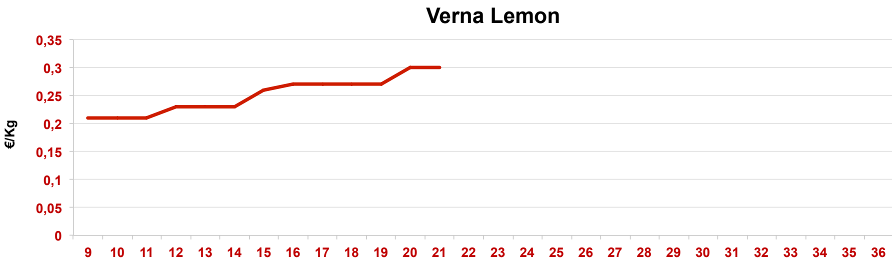

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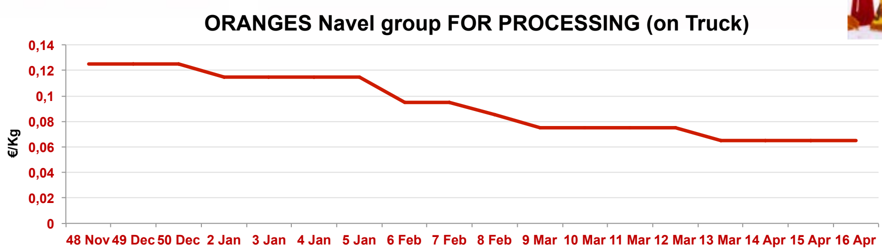

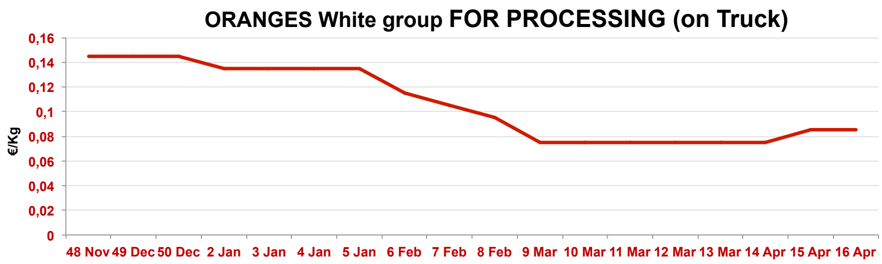

Conclusions Season 2011/2012

Outlook in time of crisis:

- Price return down in the chain, and below cost of production ¡¡¡
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- Impact of crisis on consumption (citrus and other products, available income, frequency of purchase, packaging, lower waste, …)
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- Competitiveness for EU producers with growing players (TK, EG)
- Russia ¿?

Our Export Markets

- Exports mainly concentrated in the EU Market
- Out from the EU Russia and Ukraine are the growing market
- Norway & Switzerland: stable markets
- USA: important market for easy pellers but with little progression
- Mediterrannean countries : Barcelona process for FTA .... but reality is little or no export : Turkey, Morocco, Egypt (TBT), Tunisia (SPS). Only some opportuniities in Algeria .
- Middle East : losing ground after dismantling of export refunds and strenghts of the €
- Asia and far East : China, India, irrelevant exports in regard to market potential
- Latin America and Southern Hemisphere : currently not viable commercially or lack of access

Οι εξαγωγικές μας αγορές

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The Global Citrus Scenario 2011/12

ΤΟ ΠΑΓΚΟΣΜΙΟ ΣΕΝΑΡΙΟ ΕΣΠΕΡΙΔΟΕΙΔΩΝ 2001/12

Spain, Italy Greece or Cyprus are not alone in the market: A global perspective has to be considered

ΙΣΠΑΝΙΑ, ΙΤΑΛΙΑ, ΕΛΛΑΔΑ, ΚΥΠΡΟΣ ΔΕΝ ΕΙΝΑΙ ΜΟΝΕΣ ΤΗΝ ΑΓΟΡΑ: ΜΙΑ ΠΑΓΚΟΣΜΙΑ ΠΡΟΟΠΤΙΚΗ ΠΡΕΠΕΙ ΝΑ ΛΥΦΘΕΙ ΥΠΟΨΗ

CITRUS CONSUMPTION
THE IMPACT FROM North and South Hemisphere
ΚΑΤΑΝΑΛΩΣΗ ΕΣΠΕΡΙΔΟΕΙΔΩΝ
Η ΕΠΙΠΤΩΣΗ ΑΠΟ ΤΟ ΒΟΡΕΙΟ ΚΑΙ ΝΟΤΙΟ ΗΜΙΣΦΑΙΡΙΟ

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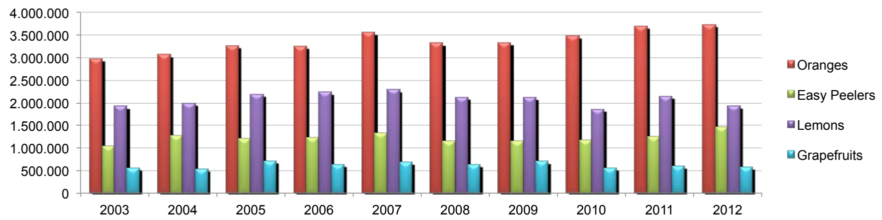
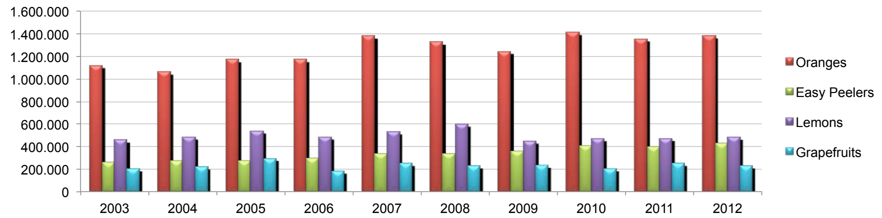
Southern Hemisphere CITRUS 2012

Total Citrus PRODUCTION Southern Hemisphere (tons)



Total Citrus EXPORT Southern Hemisphere (tons)



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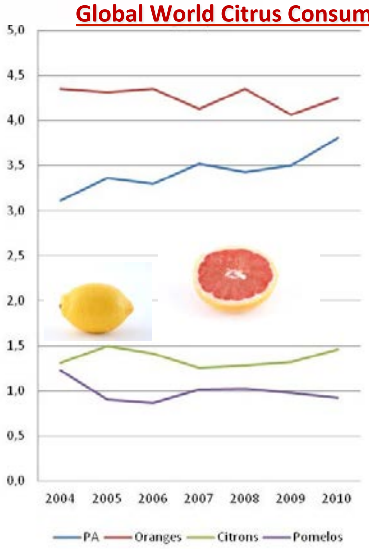
Global World Citrus Consumption - Παγκόσμια κατανάλωση εσπεριδοειδών



Παγκόσμια κατανάλωση εσπεριδοειδών. Σταθερή στα 10kg/κεφαλήν

Global citrus consumption stable at 10kg/capita

….With some differences between products:
-Orange and Grapefruit is down
-Lemon is stable
-Easy Peelers increasing

….Με μερικές διαφοροποιήσεις:
-Πορτοκάλια και γκρέιπφρουτ είναι κάτω
-Λεμόνια είναι σταθερά
-Μανταρίνια αυξάνεται

Συμπεράσματα περιόδου 2011/2012

Conclusions Season 2011/2012

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Suggestions for the recovery of the European Citrus Sector

Προτάσεις για την ανάκαμψη του ευρωπαϊκού τομέα εσπεριδοειδών

Define the Mission

Promoting and Communicating

Role of Carbon and Water Footprint, Organics, MRL´s, Certifications…

Export EU Policy, The role of new diseases

ΤΙ ΝΑ ΚΑΝΟΥΜΕ ΣΤΗΝ ΕΠΙΧΕΙΡΗΣΗ ΤΩΝ ΕΣΠΕΡΙΔΟΕΙΔΩΝ

WHAT TO DO IN THE CITRUS BUSINESS

KEY POINT FOR THE FUTURE: OUR MISSION

Our MISSION is a profitable citrus industry to satisfy the market with high quality citrus

ΒΑΣΙΚΟ ΣΗΜΕΙΟ ΓΙΑ ΤΟ ΜΕΛΛΟΝ: Η ΑΠΟΣΤΟΛΗ ΜΑΣ

GENERATE VALUE & BUSINESS

↑ CONSUMPTION

NEW MARKETS

PROFITS FOR ALL THE CHAIN

SAFETY

QUALITY

ΤΙ ΝΑ ΚΑΝΟΥΜΕ: Τόνωση της κατανάλωσης

WHAT TO DO: Stimulate consumption

- Communication : fresh produce are «cheap » compared to other agrifood product
- Health benefit of fresh produce
- Claims and image protection
- Changing CAP (fruit school scheme, promotion ,..)
- Balancing markets to avoid overlap => market transparency
- Innovation

ΤΙ ΝΑ ΚΑΝΟΥΜΕ ΣΤΗΝ ΕΠΙΧΕΙΡΗΣΗ ΤΩΝ ΕΣΠΕΡΙΔΟΕΙΔΩΝ

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WHAT TO DO IN THE CITRUS BUSINESS

Identify Our Real Competitors: It is not ourselves!
AND PROMOTE AND INNOVATE

Other Fruits:

Desserts, Snacks, Yoghourts, etc:

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THE FUTURE: WE ARE AMBITIOUS

WE NEED A ¿EU? OR ¿GLOBAL? CORPORATE IMAGE FOR CITRUS!!!

If others use our product as their image and they succeed…

ΤΟ ΜΕΛΛΟΝ: ΕΙΜΑΣΤΕ ΦΙΛΟΔΟΞΟΙ

orange™
ING DIRECT
Un Gran Banco que hace Fresh Banking
BlackBerry™
peartree INVESTMENTS
FRUIT OF THE LOOM®

LET'S USE IT !!!

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PROMOTING EXPORTS

Lack of EU policy to support export

- Export refunds phase out
- Limited EU promotion tools
- Market access , still little EU coordination => discussed MS by MS with 1/3 countries ; Situation is changing
- Too many countries remain closed for EU exports: Eg. India

Market access barriers

- High duties (for our high value produce) , even when a bilateral agreement is in place (Turkey, Morocco,.) or situation like India,…
- Political, financial and technical complexity of trading with Russia
- Phytosanitary Protocols to export citrus to USA, China, Corea Japan… (Cold Tratment)

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PESTICIDE & ACTIVE SUBSTANCES

ALDI
Max. 70% MRL
Max. 80% MRL (sum)
Max. 80% ARfD (sum)
Max. 3-5 AI

REWE, EDEKA, METRO Group (The Spirit of Commerce)
Max. 70% MRL
Max. 70% ARfD

Carrefour, Auchan
Max. 50% MRL

Kaufland
Max. 33,3% MRL
Max. 100% ARfD
Old German MRLs

LIDL
Max. 33,3% MRL

KAISER'S TENGELMANN
Max. 70% MRL
Max. 70% ARfD
Old German MRLs

* Policies are not necessarily in force throughout all EU Member States

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CLIMATE CHANGE - CARBON FOOTPRINT

Increased awareness consumers:

- Varying response of retailers
- New NGO focus
- Increasing interest authorities (e.g. public procurement)

LESS CO_2 AGRICULTURA REGIÓN DE MURCIA

km zero

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…AND MUCH MORE IN THE FUTURE !

Life Cycle

Water foot print

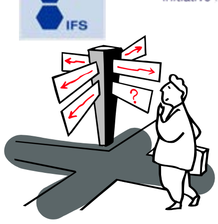
Who is paying?….

Always the same: The Producers…

CORPORATE SOCIAL RESPONSIBILITY

- **Increased attention for social conditions of food production**
- **Initial focus on banana and exotic fruit, but widening scope**
- **Social certification to protect social conditions in conventional agriculture**
  - Ethical Trading Initiative (ETI)
  - Business Social Compliance Initiative (BSCI)
  - GlobalGAP GRASP-module

CERTIFICATIONS



Proliferation, confusion and cost: harmonisation !

CITRUS DISEASES MAY INFLUENCE THE FUTURE

Citrus Canker

Citrus Black Spot

Greening

Mal secco

A EU Protection Scheme has to be adopted

AND FINALLY… THE MOST IMPORTANT: PRICE

- **Price is top of mind for consumers… and producers, specially in period of crisis**
- **Impact on the market of discounters growth, especially as they continue to aggressively expand**
- **Promotions, price cuts and special offers are more important than ever… AT THE EXPENSE OF PRODUCERS**
- **European debate on sustainability of supply chain .. THE NEED TO BALANCE THE MARGINS**
- **Legal Measures to protect growers: prices linked to cost of production index**

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CONCLUSION

Doing nothing is not a good option

We as the sector must cooperate to achieve the goals