

## COMMITMENT TO TRANSPARENCY



### **AILIMPO'S LEMON FORECAST**

**Spain will lead the LEMON market in 2020/2021 with a TOTAL production volume of 1,290,000 Tons.**

**LEMON FROM SPAIN will be sustainable, certified, 100% quality, and local for the European consumer**

**Spain will keep its leading position in conventional and organic lemons by consolidating sustainable production, support for biodiversity and GLOBALGAP and GRASP certification, offering the European market a local product.**

*Murcia, 30th September 2020*

The harvest estimate (forecast) of lemons for the 2020/2021 season confirms and adjusts the data already announced in July and figures production at 1,290,744 tonnes with an overall increase of 8%. By variety, a 14% increase is expected in the case of FINO lemon and a slight decrease of 5% in the VERNA variety.

#### Start of the Spanish season



**LEMONS ARE HIGH IN VITAMIN C. WHICH HELPS CONTRIBUTE TO THE NORMAL FUNCTION OF THE IMMUNE SYSTEM**



The FINO Lemon season begins at the end of September and will gradually be developed to enter into full swing during the month of October until July 2021. In a scenario of uncertainty due to the COVID-19 which causes an increase in costs for the entire supply chain (producers, marketers and processors), lemons from Spain are an important natural source of Vitamin C.

***"The increase in costs caused by COVID-19 must be taken into account by the market with the aim of achieving a correct balance of prices and distribution of economic value along the chain"***

In the case of the FINO LEMON variety, a slight increase of 14% is estimated to reach 947,000 tonnes. A greater precocity is observed in the early varieties with adequate quality and commercial size to make the first harvest and to begin the season with good rhythm.

## COMMITMENT TO TRANSPARENCY



***“In a scenario of general uncertainty caused by the COVID-19, Spain's Fino Lemon will consolidate its leading role in Europe by offering consumers Vitamin C and quality”***

As far as the VERNA LEMON crop is concerned, the forecast is for a harvest of 343,000 tonnes in 2021, which would be very similar to that of the last 2020 season with a slight decrease of 5%. After some uncertainty in the orchards due to the irregular setting of some varieties as a result of excessive humidity in the spring, when there were episodes of falling fruit on this variety, everything indicates that, although yields will not be high in relation to the average, the entry into production of new verna lemon plantations will largely compensate for this.

***“The harvest of Verna lemon, a native Spanish variety, guarantees availability throughout the summer of 2021”.***

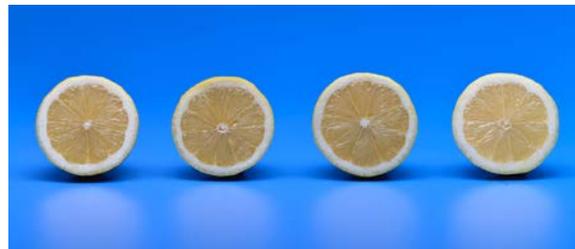
### Perspectives

With these figures for the 2020/2021 season, Spain will continue to consolidate its commercial position in Europe, where it maintains an unquestionable leadership with quality lemons, health guarantees and excellent service, supplying the consumer a very fresh product, which is a very differentiating element in comparison with lemons from other countries. It will also enable the presence of Spanish fruit to continue in third countries such as Canada, the United States and the Middle East.



In relation to **processing**, it is estimated that between 22% and 27% of the crop will go to the processing plants, an activity in which Spain ranks second in the world, with a wide range of juices, essential oils and dehydrated peel.

In addition, the GlobalGAP and GRASP certifications are key elements for the next campaign, within the strategy of the interprofessional for the differentiation of the Spanish lemon and the promotion of a **sustainable production under the triple approach: economic, environmental and social.**



## COMMITMENT TO TRANSPARENCY



### LEMON CROP IN SPAIN SEASON 2019/20 AND 2020/2021 FORECAST

#### FINAL CROP 2019/2020

DESTINY	Tonnes
EU Exports	678,454
Non EU Exports	32,542
Domestic	184,500
Losses	44,775
Processing	252,167
<b>TOTAL</b>	<b>1,192,438</b>

#### FORECAST 2020/2021

	Total Crop 2019/20	Forecast 2020/21	Difference (%)
<b>FINO</b>	831,200	947,568	+14%
<b>VERNA</b>	361,238	343,176	-5%
<b>TOTAL</b>	<b>1,192,438</b>	<b>1,290,744</b>	<b>+8%</b>

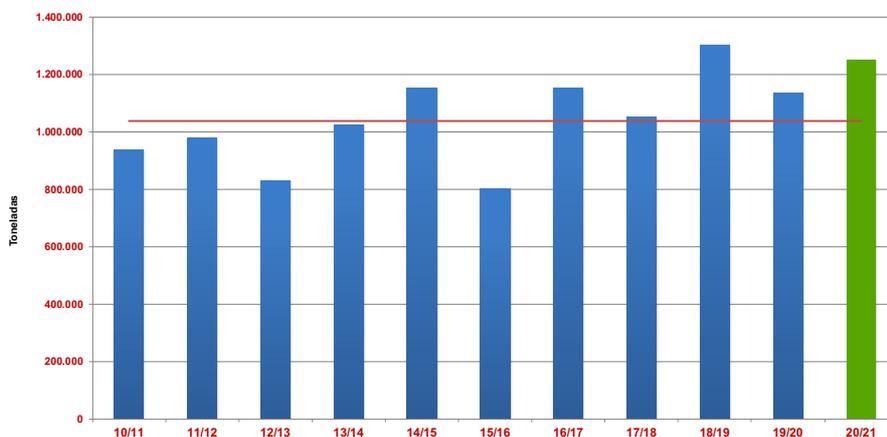
Tonnes

#### LEMON CROP IN SPAIN

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21*
<b>CROP</b>	936,000	977,000	830,000	1,024,000	1,154,000	800,852	1,152,000	1,050,000	1,302,000	1,192,438	1,290,744

TONNES \* AILIMPO's Forecast 2020/2021

	AVERAGE DATA 10 YEARS 2010-2020	FORECAST 2020/2021
<b>CROP</b>	1,041,000 Tons	1,290,744 Tons



## COMMITMENT TO TRANSPARENCY



**Next Update: Ailimpo will update the harvest forecast, with an emphasis on the estimate of Verna lemon, on:**

---

✓ **Thursday, 28 January, 2021**

---

**Note on Methodology:** Ailimpo drew up this technical report following the working protocol, using information provided by surveys given to producers, cooperatives, exporters, and processing industries, in addition to field information from its control farms.

---

*Ailimpo is a national inter-professional association, based in Murcia, officially recognised by the Ministry of Agriculture and the European Commission, which represents the economic interests of producers, cooperatives, exporters, and lemon and grapefruit industries in Spain, a sector in which Spain is the world leader for fresh product and 2nd in the ranking of processing countries, with a turnover of €700 million per year, generating 20,000 direct jobs, and a turnover of over €250 million in related industries.*

*The lemon sector contributes to environmental sustainability, with a positive net balance of 304,840 tonnes of CO2 captured per year.*

*By law, its functions include: Ensuring the proper operation of the food supply chain, Drawing up agri-food contracts and developing methods for monitoring and streamlining the use of phytosanitary products to guarantee the quality of the products and the protection of the environment, and Boosting and promoting quality and excellence standards in the sector*