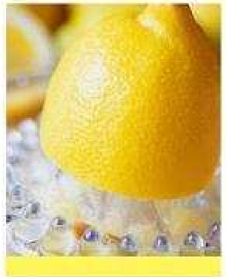
   

FRESHFEL CITRUS COMMITTEE

Jose Antonio Garcia

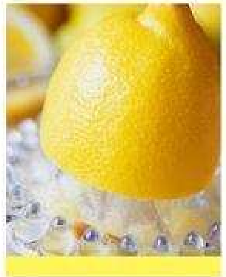
SUMMARY

1. REASONS TO CREATE THE FRESHFEL CITRUS COMMITTEE
2. STRUCTURE AND STAKEHOLDERS
3. WORKING BASIS
4. ANNUAL CALENDAR
5. NH CITRUS PRODUCTION FORECAST 2008/09
6. SH SEASON 2008 EXPORT BALANCE

REASONS TO CREATE THE FRESHFEL CITRUS COMMITTEE

- Provide a reliable and useful information system in an ever more global market => improve transparency
- Approximate position and assist in the case of specific difficulties
  - Lemon : Argentina v. Spain;
  - Orange South Africa v Spain
- Discuss technical matters of common concerns
- Provide a platform for the international citrus community to meet and foster cooperation






REASONS TO CREATE THE FRESHFEL CITRUS COMMITTEE

MAIN FOCUS- Citrus is a Global Business => We need a Global Committee

- Global from a geographic perspective :
  - Production in NH and SH
  - Market : EU, USA, Russia, Asia
- Global Business Chain:
  - Producers, Exporters, Importers

=> **A place to meet for International Citrus Community**

REASONS TO CREATE THE FRESHFEL CITRUS COMMITTEE

Main Objectives: Transparency

- Monitor the citrus market
- Exchange useful and updated information within the sector
- Analyse and Study professionally and independently the Citrus Business
- Participate and collaborate with any public/private forum (e.g. EC)
- Provide a networking platform where citrus industry representatives from across the chain can meet and share views and gear positions to one another

ESTRUCTURE AND MEMBERS

•Committee created within the Freshfel Structure

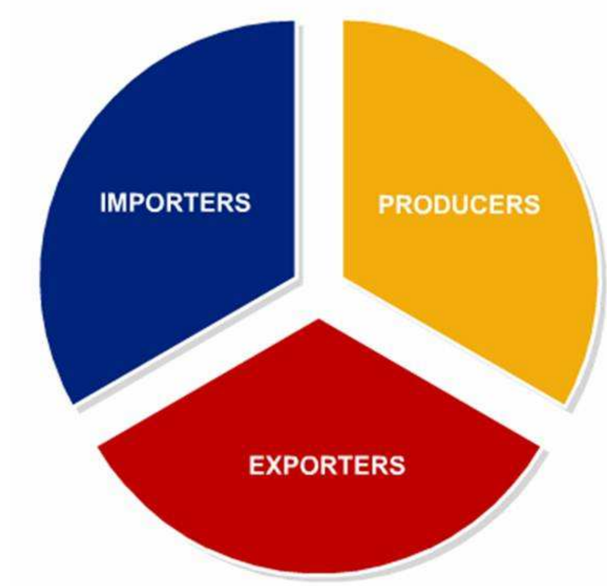
•Chairman: José Antonio García (SP)

•Technical and Administrative Support: Freshfel Secretariat

•Coordination with SHAFFE (Justin Chadwick - RSA)

<u>Members all over the Citrus World</u>

- Producers
- Exporters
- Importers



All the participants being active in the business

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PARTICIPANTS

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WORKING BASIS

Antitrust Declaration: Discussion to be informative and by no means lead to agreements on the price or volume

- **Teleconference Meetings:**
  - Short/Medium Term Analyse
  - Review of the situation

- **Physical Meetings:**
  - More in deep analyse
  - Long Term Topics
  - Reflect Deeply on the big Challenges

WORKING BASIS

Typical Structure of a Teleconference meeting:

- Comments on the SH and NH Season
- Market Situation Analysis
- Discussion focused on quality, size and supply/demand
- Statistical Data and Report distributed within 24 hours

ANNUAL CALENDAR

Date	Specific Topic	Type
September	Preliminary NH forecast / SH Ending Season	TC
October	NH Forecast / SH Balance	TC
December	NH on going season	TC
February	Preliminary SH Forecast –Development NH	PM
April	SH Forecast / NH Ending Situation	TC
July	SH on going season	TC

OTHER MAIN ITEMS: WE ARE AMBITIOUS

On going Topics:

- Marketing and Promotion
- Plant Health Issues: Citrus Black Spot, Greening, Citrus Canker
- Market Access: Phytosanitary Protocols

Next:

- Production techniques
- Logistics
- Packaging…

LAST TELECONFERENCE: 14 OCTOBER

Provide NH Citrus Production Trends based on official data, business sources and representative organisations

* SH Balance
* Market Trends
* NH Citrus Forecast

NH CITRUS PRODUCTION FORECAST

TOTAL CITRUS	2007/2008	2008/2009	% Var
SPAIN	5.334.228	6.540.814	23%
CYPRUS	136.600	109.200	-20%
ITALY	3.542.800	2.682.920	-24%
GREECE	1.088.500	1.088.500	0%
MOROCCO	1.239.000	1.360.000	10%
TURKEY	2.413.000	2.500.000	4%
EGYPT	2.795.000	2.515.500	-10%
ISRAEL	547.000	568.000	4%
TOTAL MED BASIN	17.096.128	17.364.934	2%
USA	4.810.914	4.059.314	-16%
TOTAL	21.907.042	21.424.248	-2%

NH CITRUS PRODUCTION FORECAST

DETAIL BY PRODUCT

	2007/08	2008/09	% Var.
ORANGES	12.134.964	11.334.360	-7%
EASY PEELERS	5.061.420	5.159.764	2%
LEMONS	2.725.224	3.180.150	17%
GRAPEFRUITS	1.985.434	1.749.974	-12%
TOTAL	21.907.042	21.424.248	-2%

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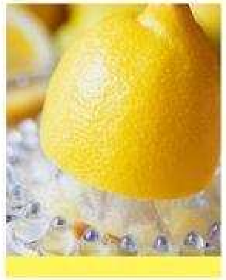
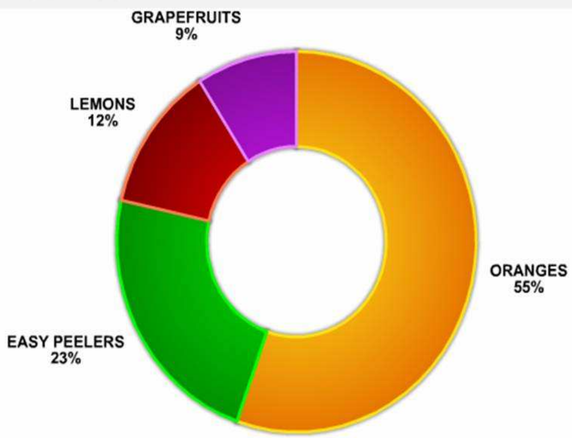
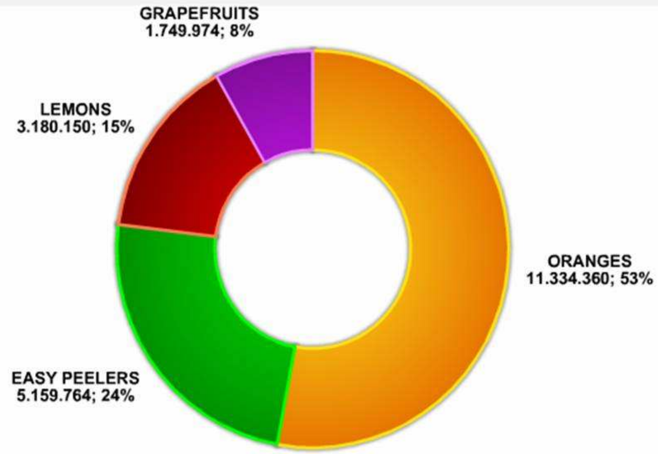


PROD. CITRUS 07/08



PROD. CITRUS 08/09



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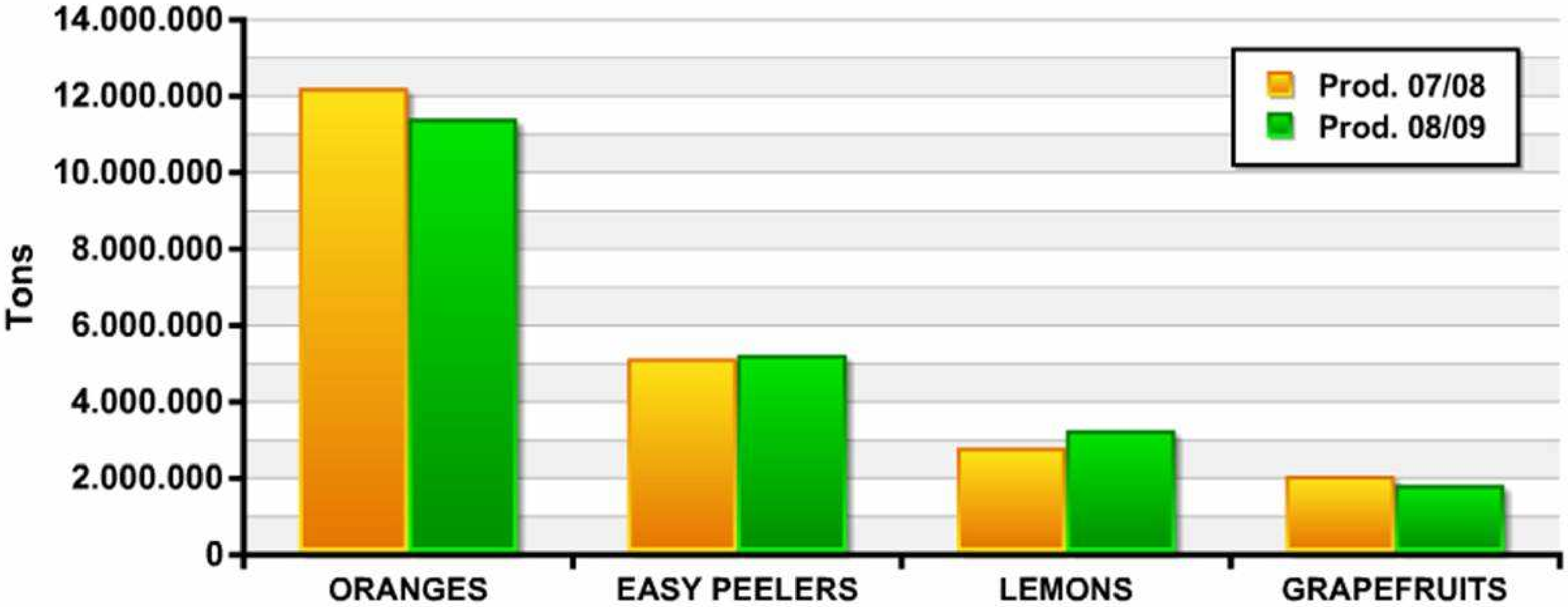
TOTAL CITRUS

Prod. 07/08 - 08/09



ORANGES TRENDS

SPAIN: Important production increase, Small sizes in general. Interprofessional Agreement to impose size limitations to reduce the volume sent to the fresh market

ITALY: Decrease on Tarocco will affect export figures
TURKEY, MOROCCO, GREECE: Similar Volumes

USA: California Navel: Starting Export in Mid November Good Quality. Valencias: Stop declining production

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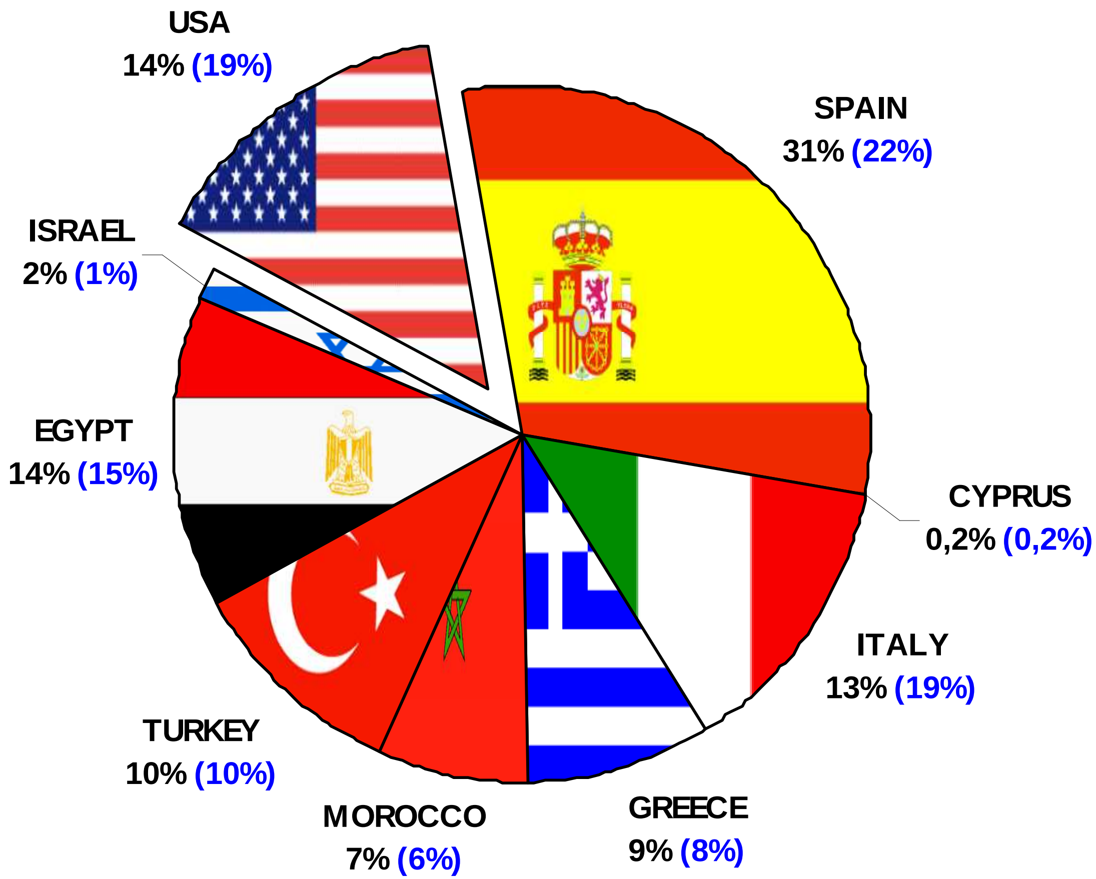
Prod. ORANGES 08/09 (07/08)



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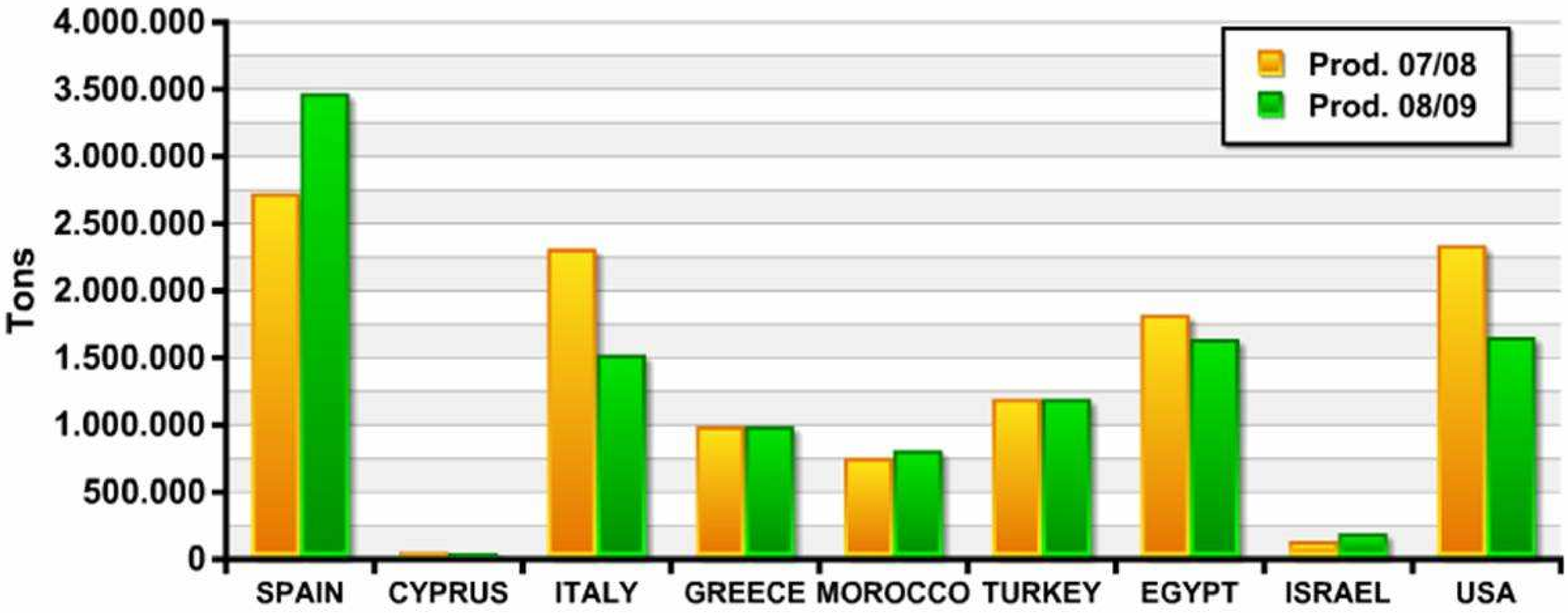
ORANGES
Prod. 07/08 - 08/09

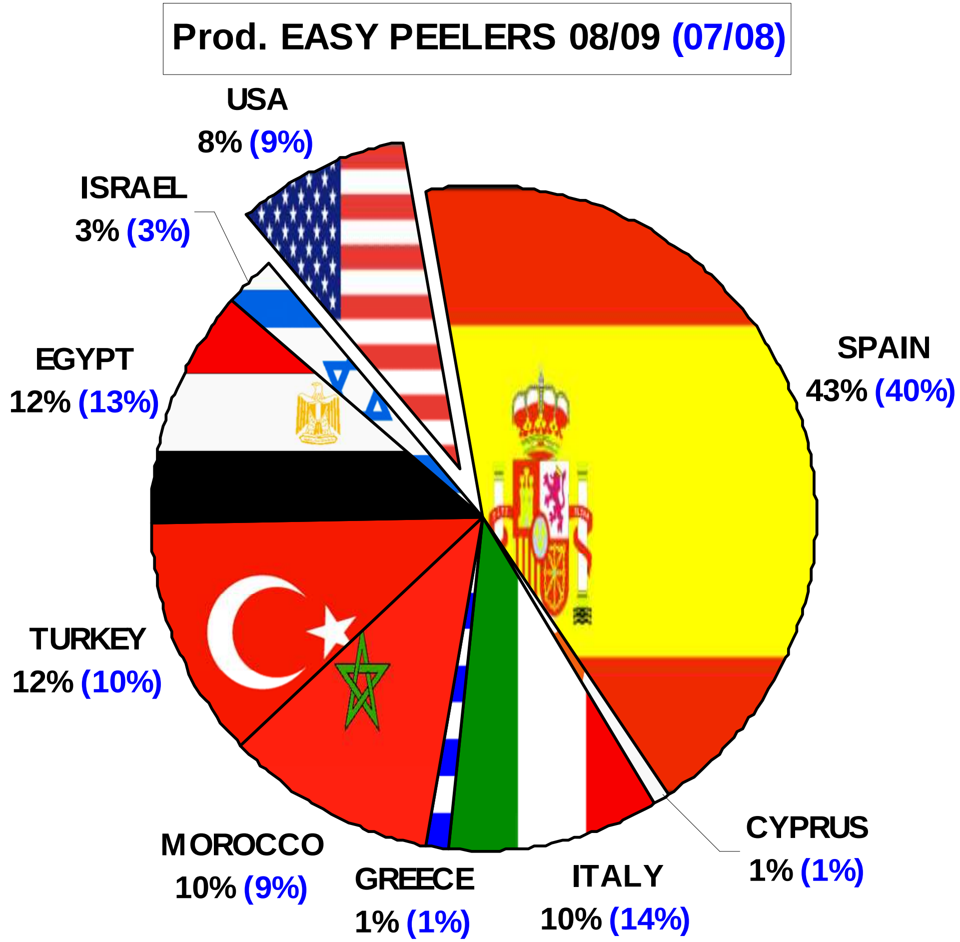


EASY PEELERS TRENDS

SPAIN: **Significant grow with smalls sizes in general**

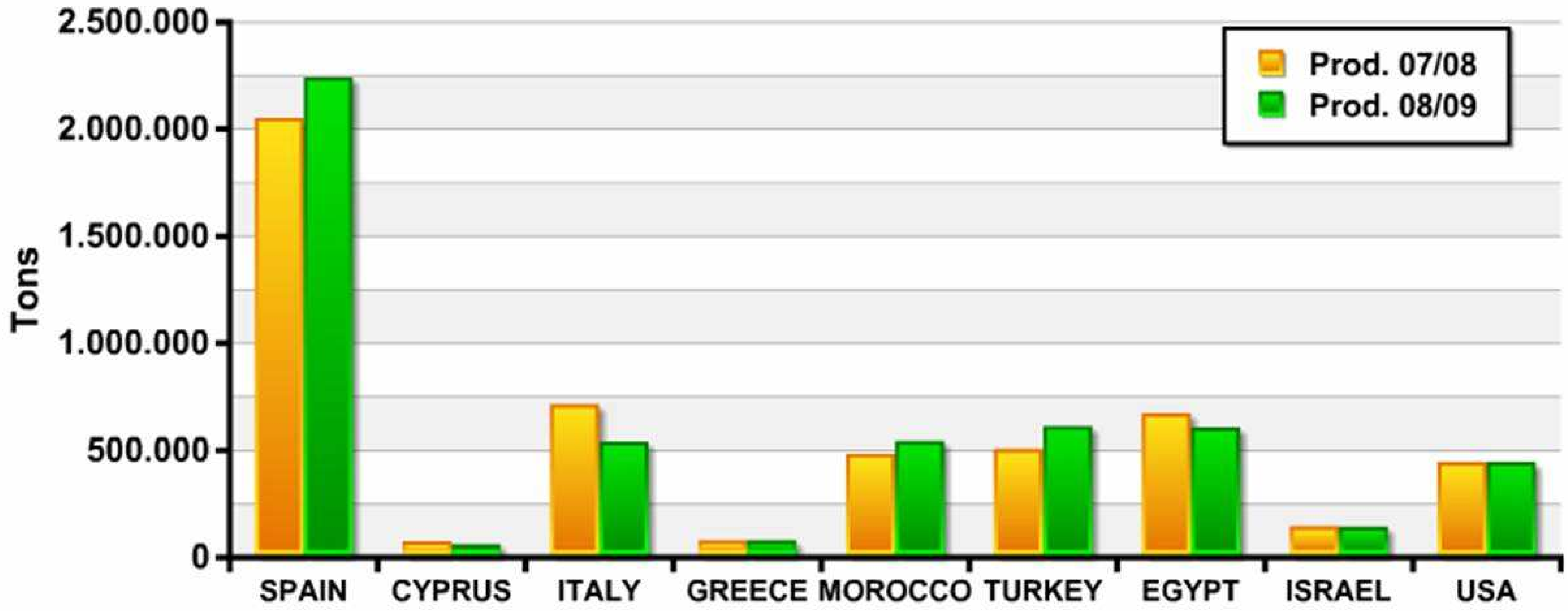
USA: **Increase in California vs Decline in florida**
Shift to Clementines vs Tangerines

Morocco: **10% more Season is earlier (1 week)**
Increases on exports forecasted


Prod. EASY PEELERS 08/09 (07/08)
USA
8% (9%)
ISRAEL
3% (3%)
EGYPT
12% (13%)
TURKEY
12% (10%)
MOROCCO
10% (9%)
GREECE
1% (1%)
ITALY
10% (14%)
CYPRUS
1% (1%)
SPAIN
43% (40%)

EASY PEELERS

Prod. 07/08 - 08/09



LEMONS TRENDS

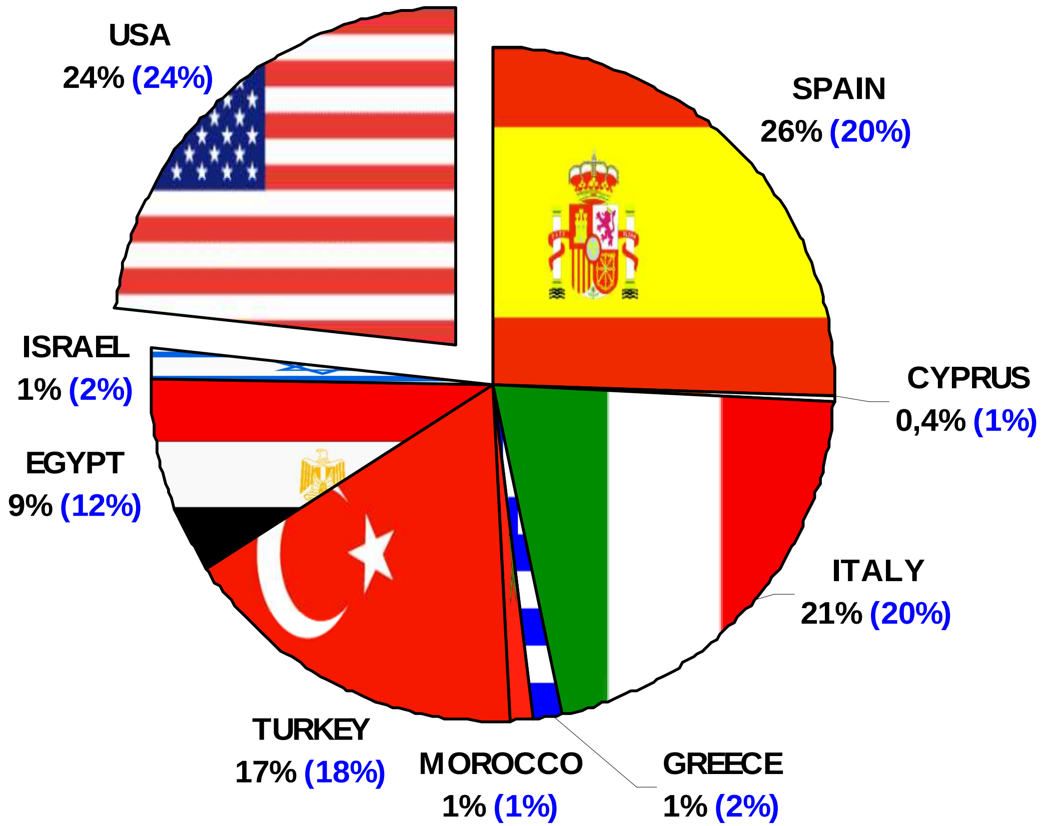
SPAIN: Going back to normal volumes, 40% more on Fino variety. Late beginning due to small sizes. Export will depend on market access to Russia

ITALY: 20% more than last year

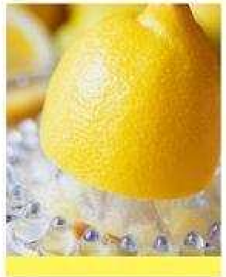
TURKEY: Late beginning and short production for Interdonato. Normal volume for Lamas to start end November

USA: Production Up 16% mainly in Arizona

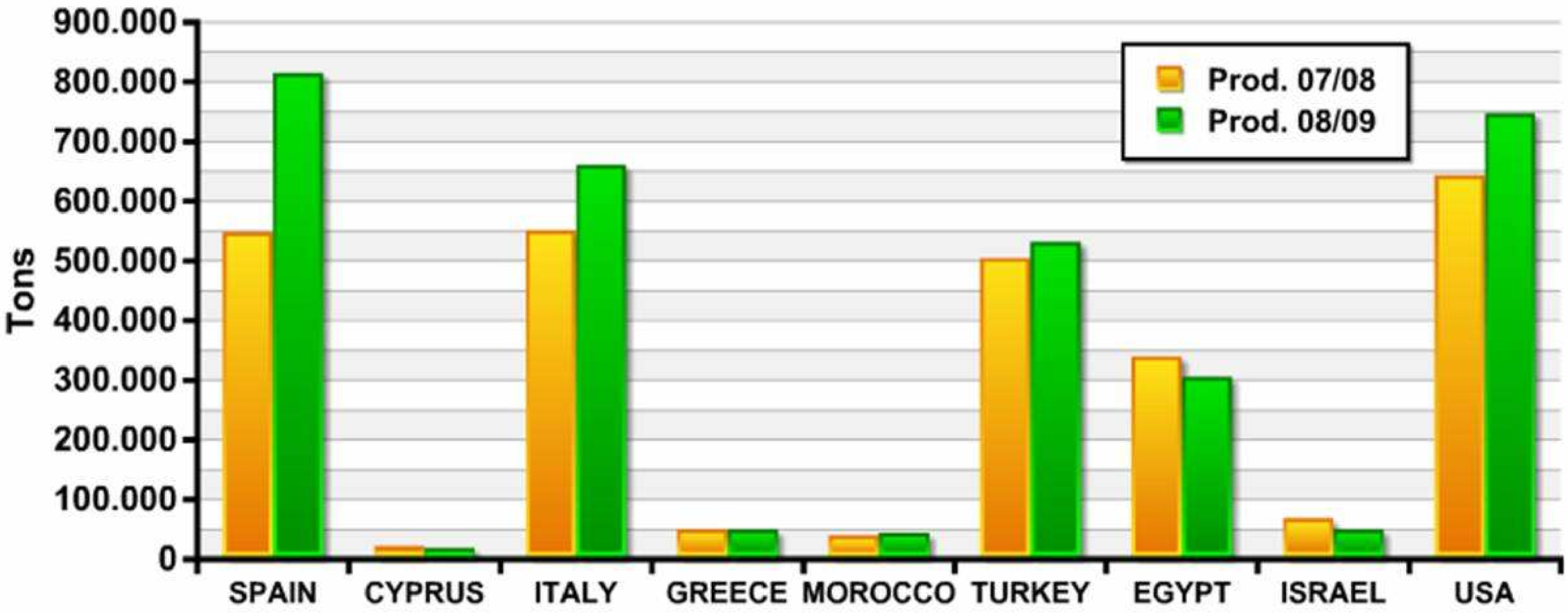
Prod. LEMONS 08/09 (07/08)








LEMONS
Prod. 07/08 - 08/09



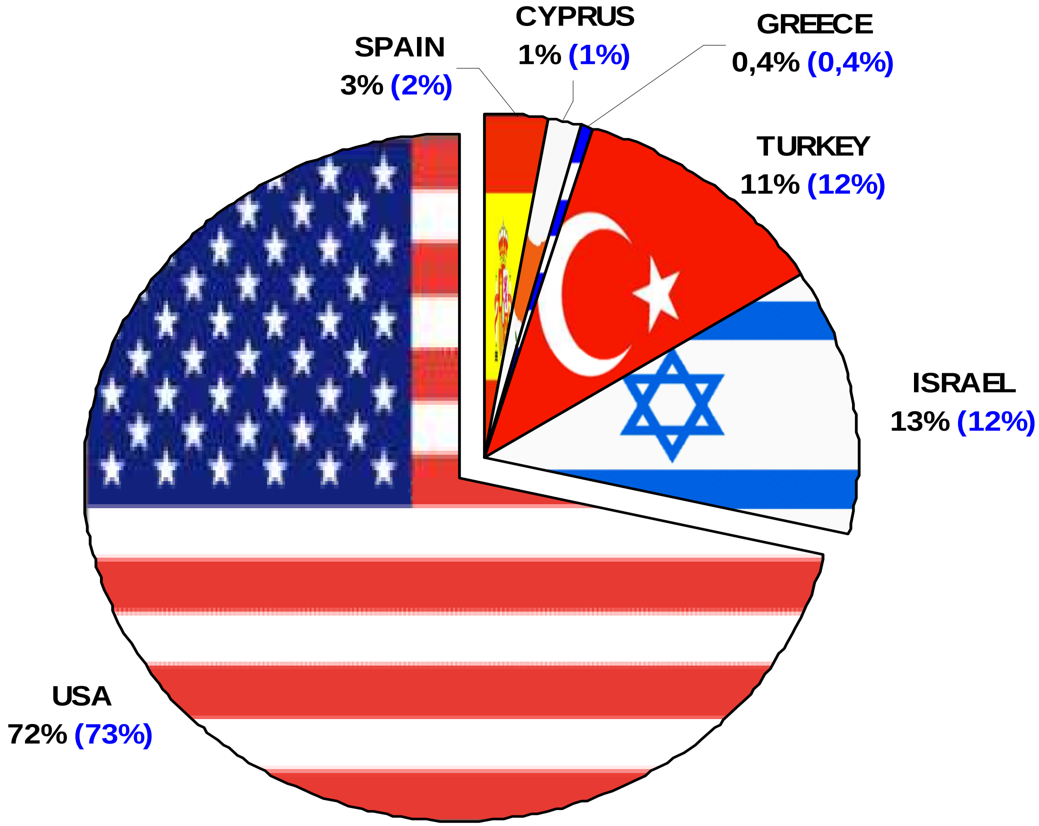
GRAPEFRUITS TRENDS

USA: **9% down: diseases (canker) and weather conditions**

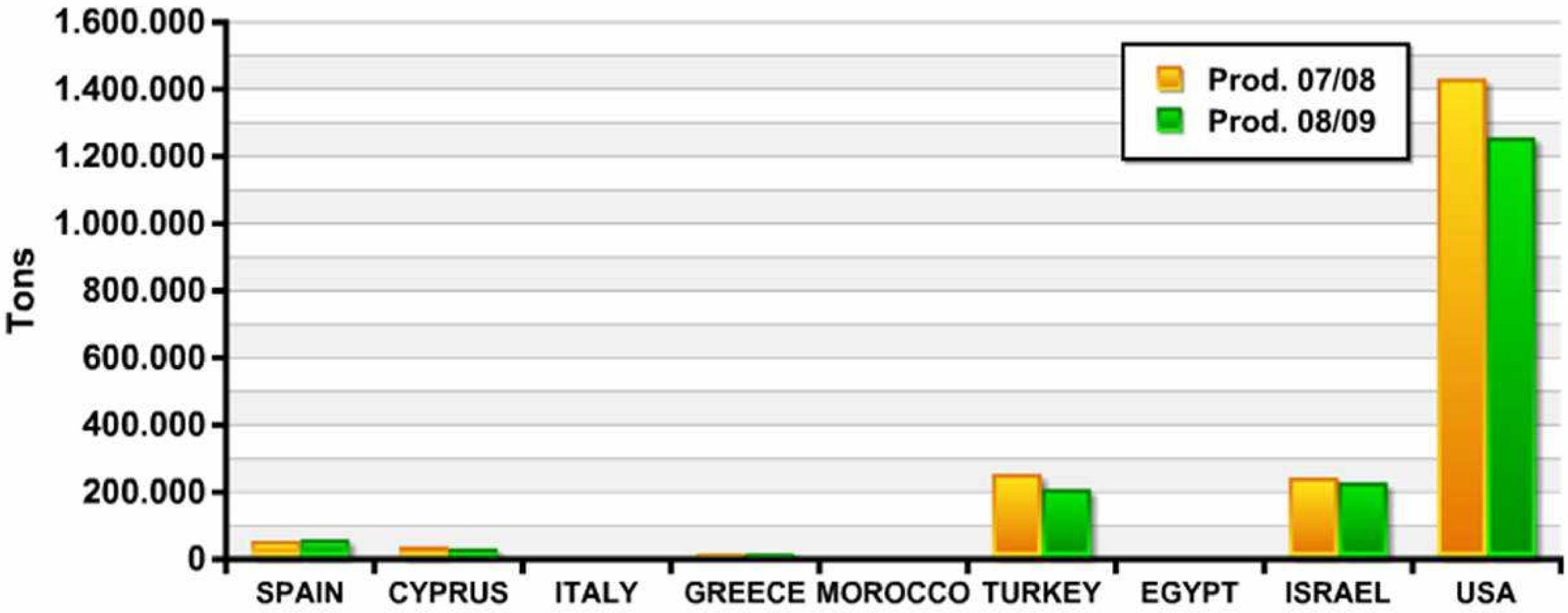
Israel: **6% less forecasted starting earlier**

Turkey: **Important reduction -20%**

Prod. GRAPEFRUITS 08/09 (07/08)



GRAPEFRUITS
Prod. 07/08 - 08/09






SH SEASON 2008 EXPORT BALANCE

	2007	2008	% Variation
ORANGES	1.164.713	1.112.634	-4%
LEMONS	427.545	498.814	17%
EASY PEELERS	286.151	293.150	2%
GRAPEFRUITS	242.869	217.725	-10%
TOTAL	**2.121.278**	**2.122.323**	**0%**

SH ORANGE EXPORT TRENDS

1. South Africa consolidates its leadership position

2. Argentina decreased exports by 28%

3. Important increases for Peru (+280%) and Chile (232%) but absolute figures are marginal

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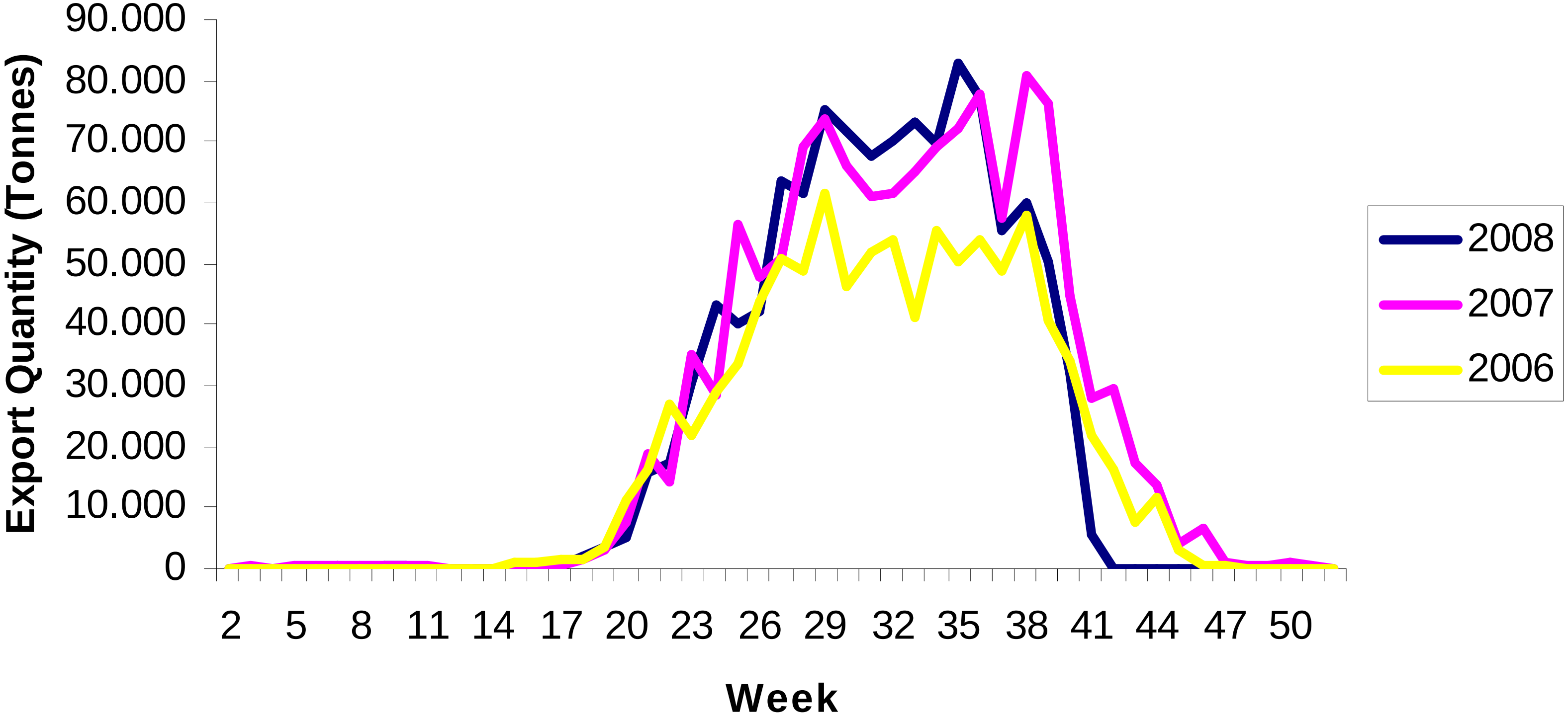
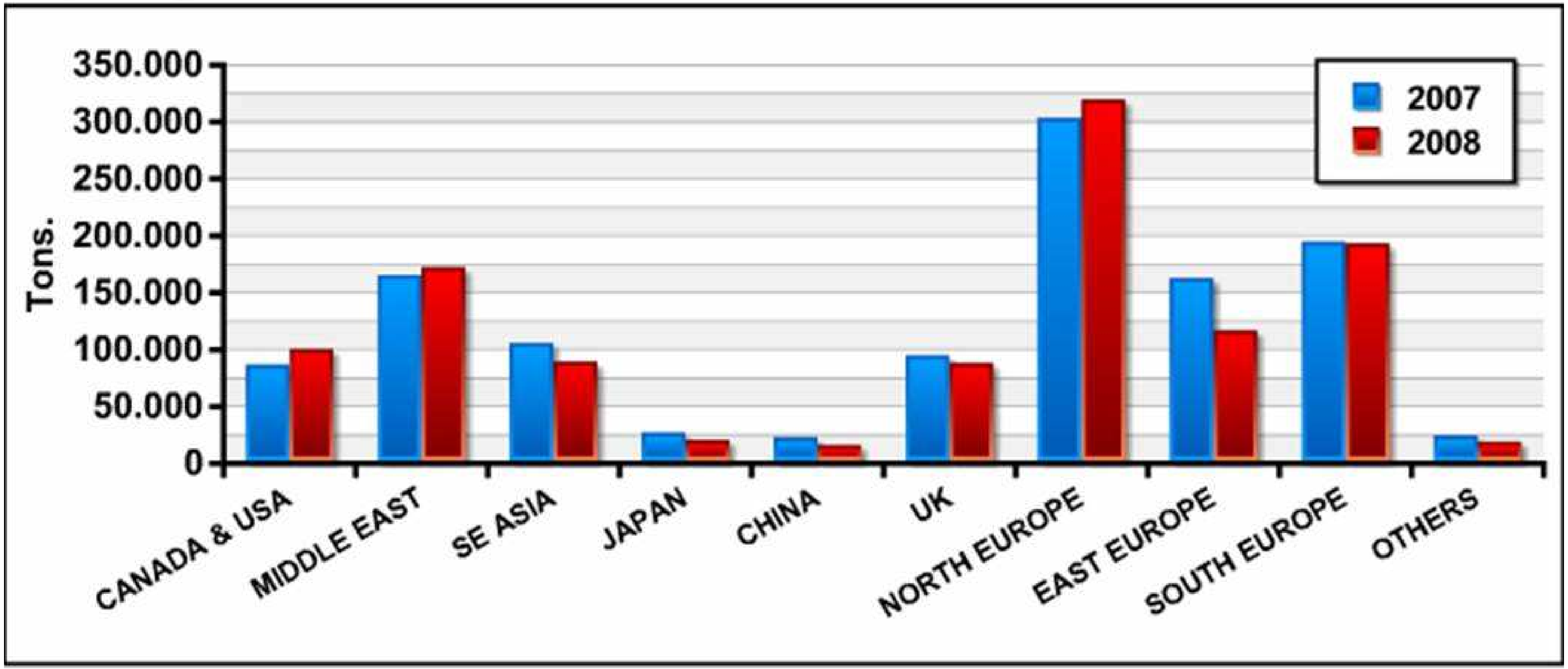
Weekly Orange Export Comparison (All Countries)






ORANGES

Exports by Market



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SH LEMON EXPORT TRENDS

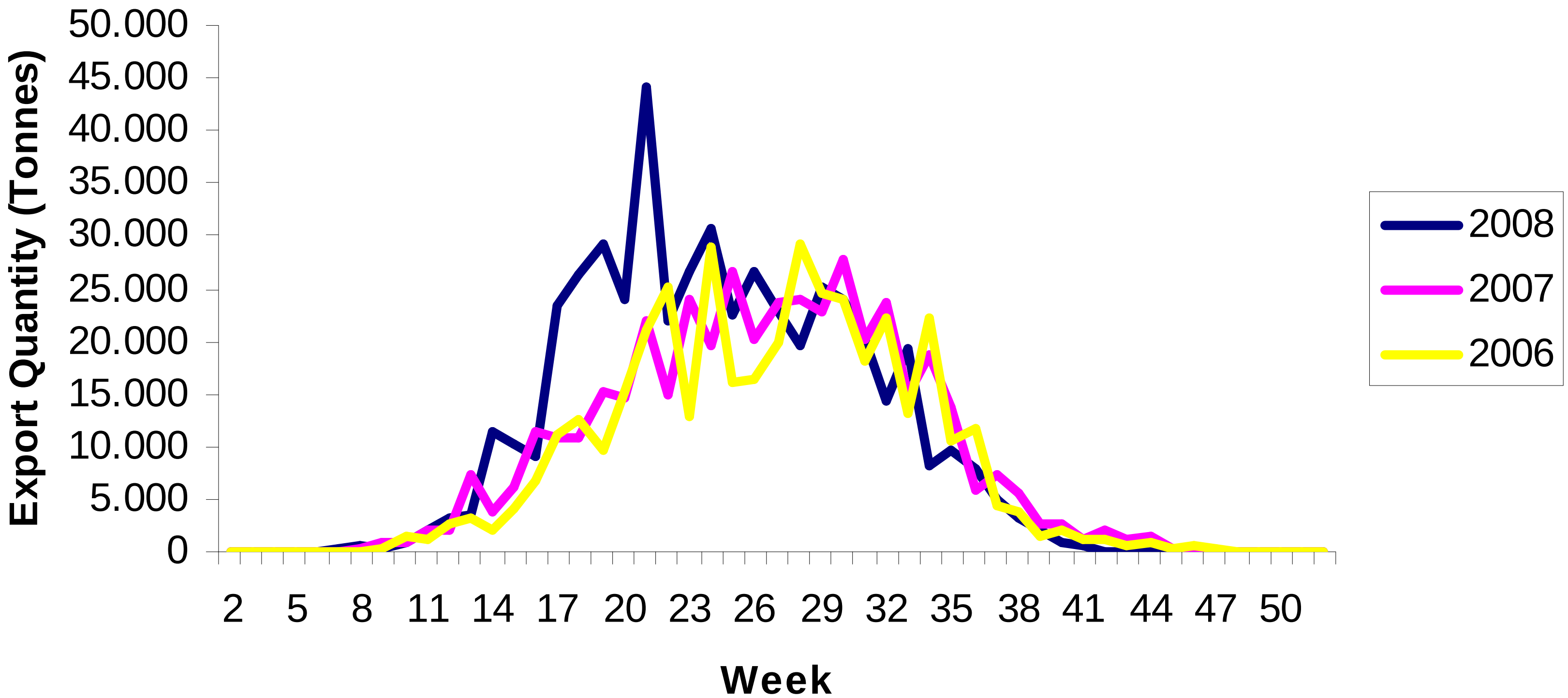
1. **Argentina and South Africa main players**

2. **Argentina is the leader with 318.000 tons exported**

3. **Important increased for South Africa (+34%) standing at 130.000 tons.**

4. **Important increase at the beginning of the season due to poor production in Spain.**

Weekly Lemon Export Comparison (All Countries)



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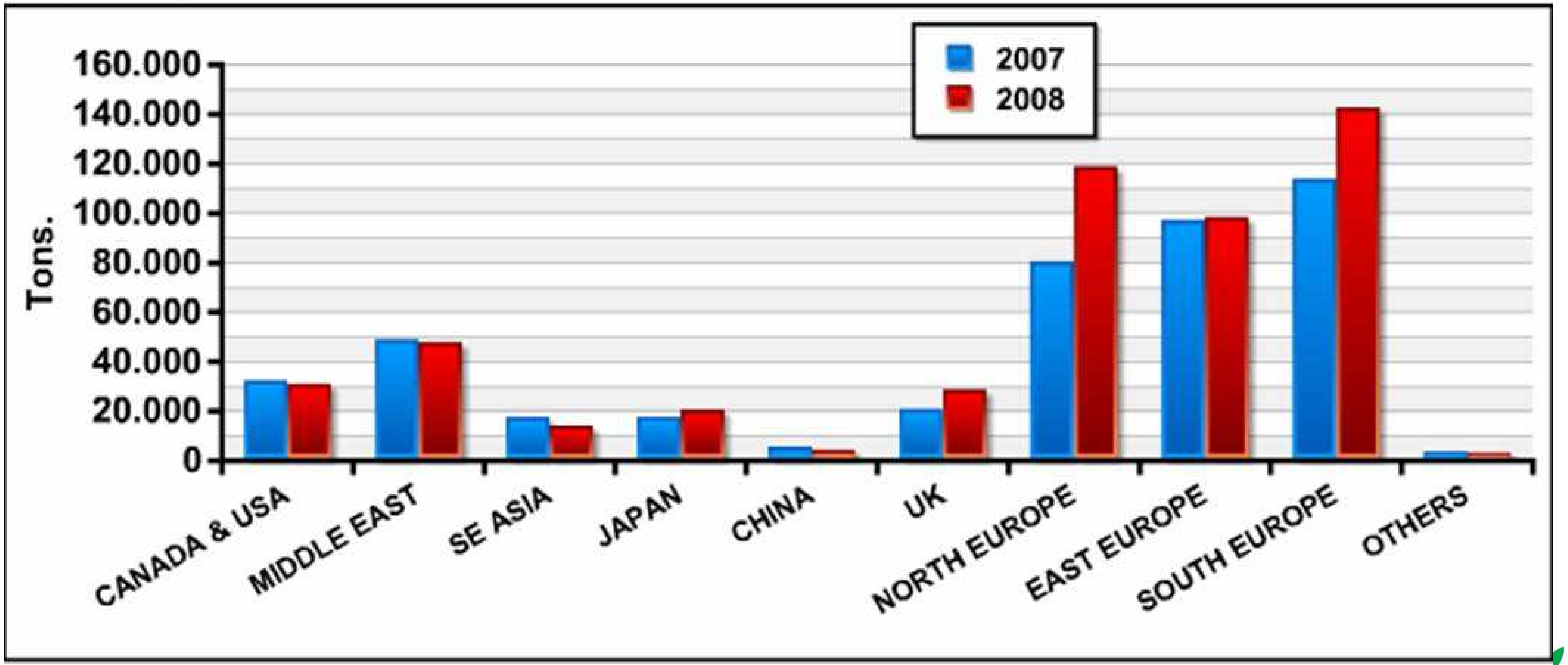
LEMONS

Exports by Market



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SH EASY PEELERS EXPORT TRENDS

1. Overall Exports remain stable (+2%)

2. South Africa the leader up 4% reaching 98.000 tons

3. Followed by Argentina with 80.000 tons (-3%)

4. Uruguay and Chile decreasing with lower volumes

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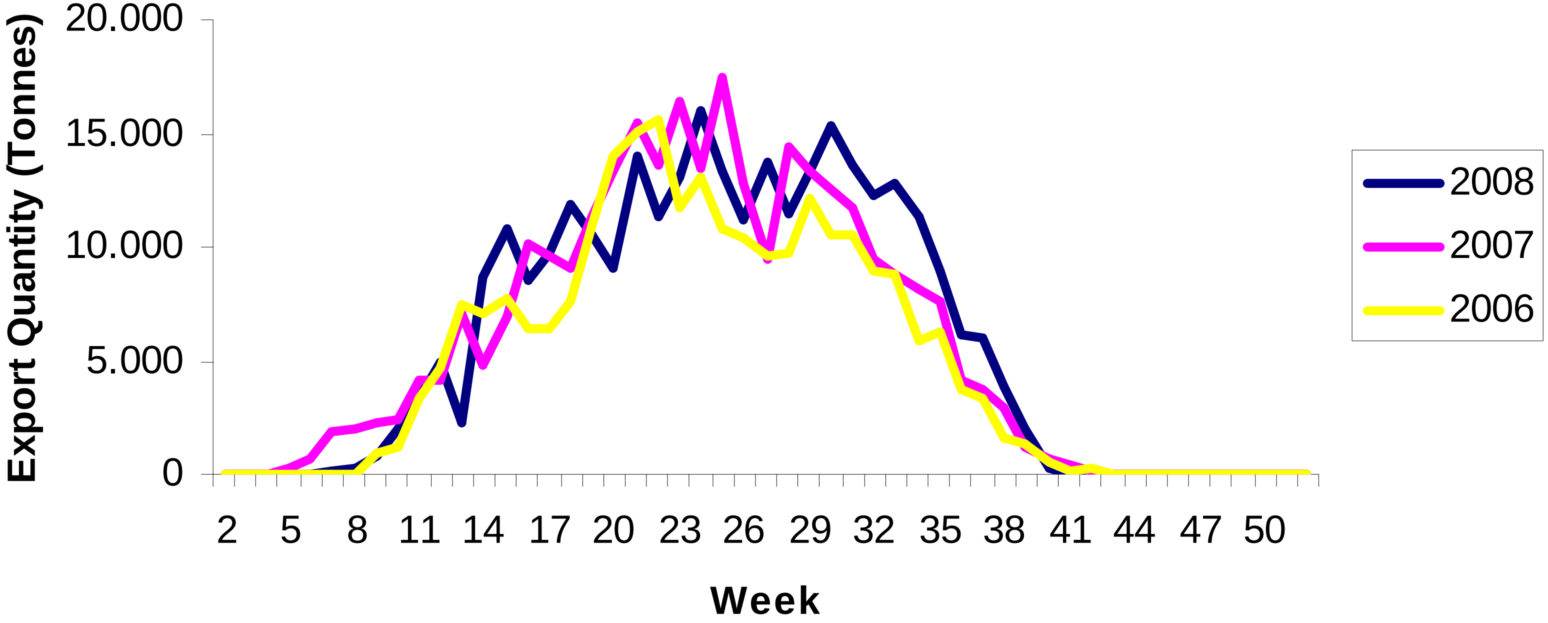
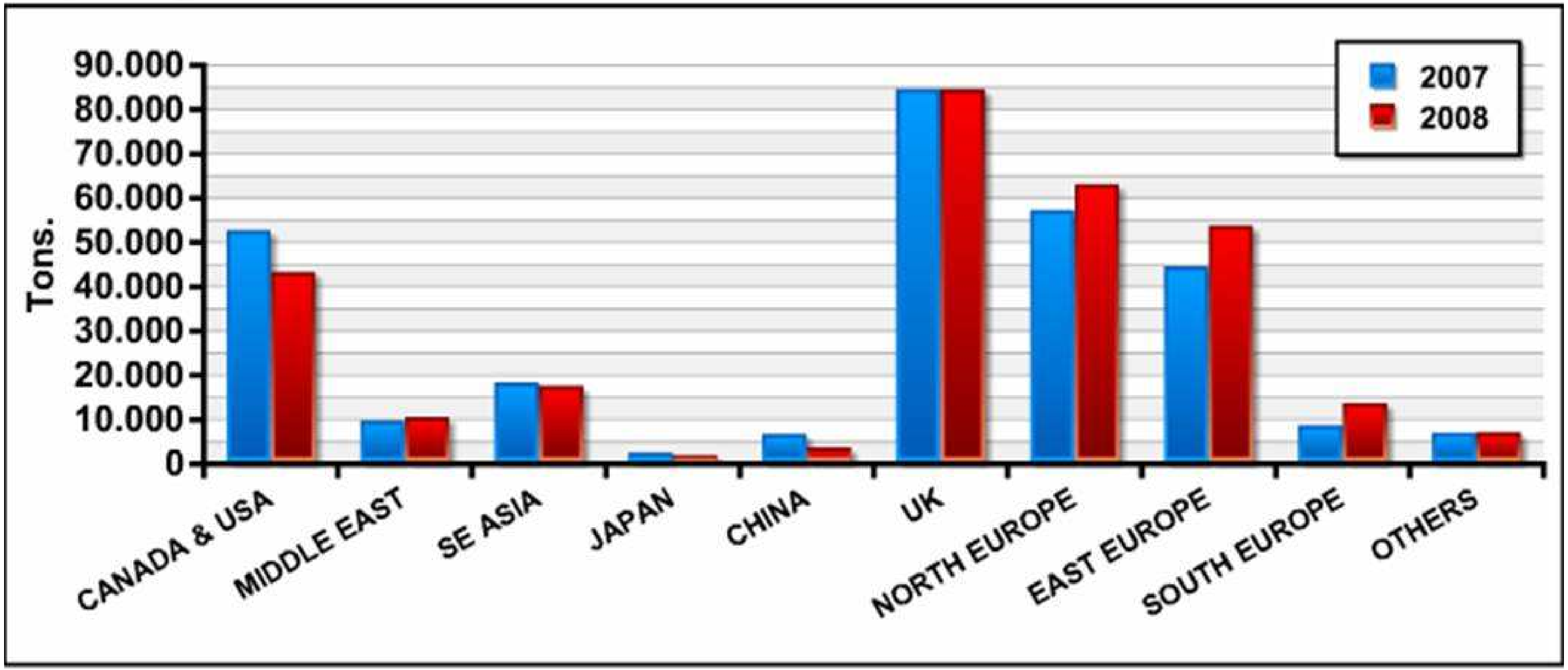
Weekly Soft Fruit Export Comparison (All Countries)



EASY PEELERS

Exports by Market



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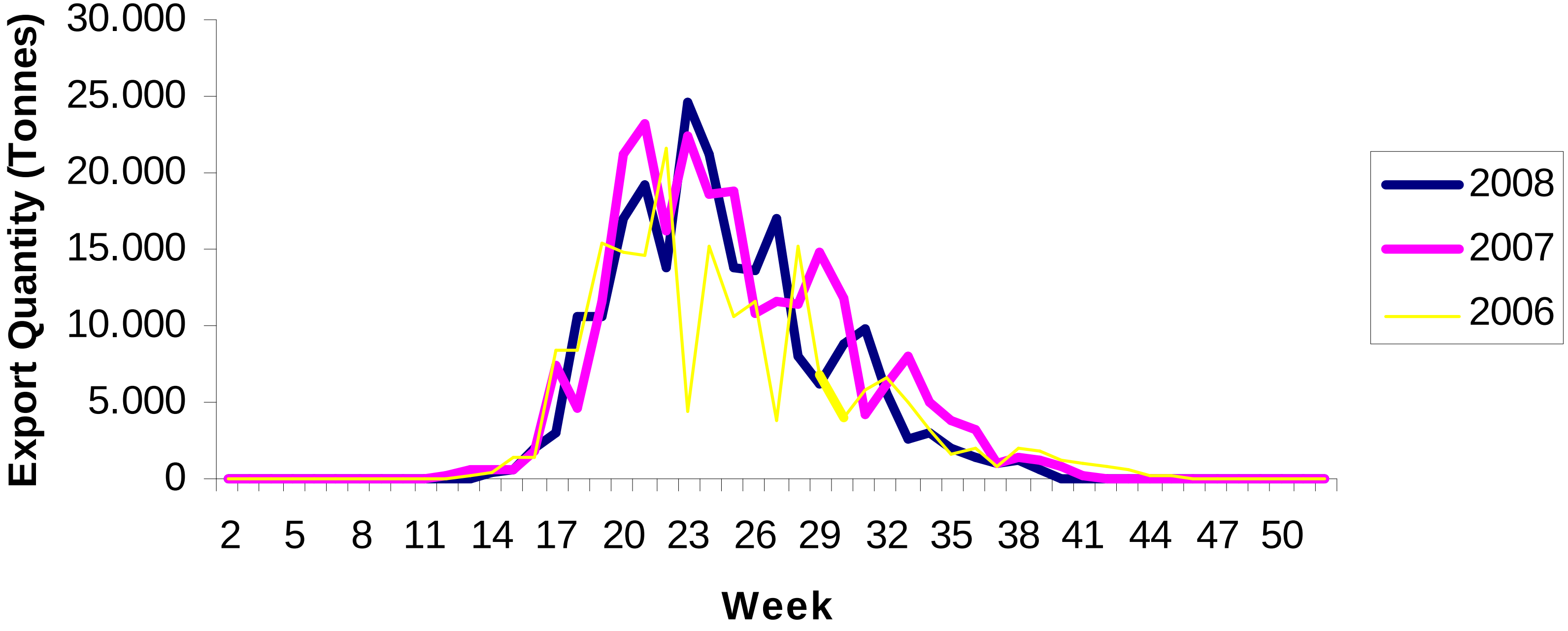
SH GRAPEFRUIT EXPORT TRENDS

1. **Overall exports down by 10%**

2. **South Africa is the main player but reduces exports by 13%.**

3. **Other suppliers far away from SA with low figures except Argentina with 30.000 tons exported (+16%)**

Weekly Grapefruit Export Quantity Comparison (All Countries)



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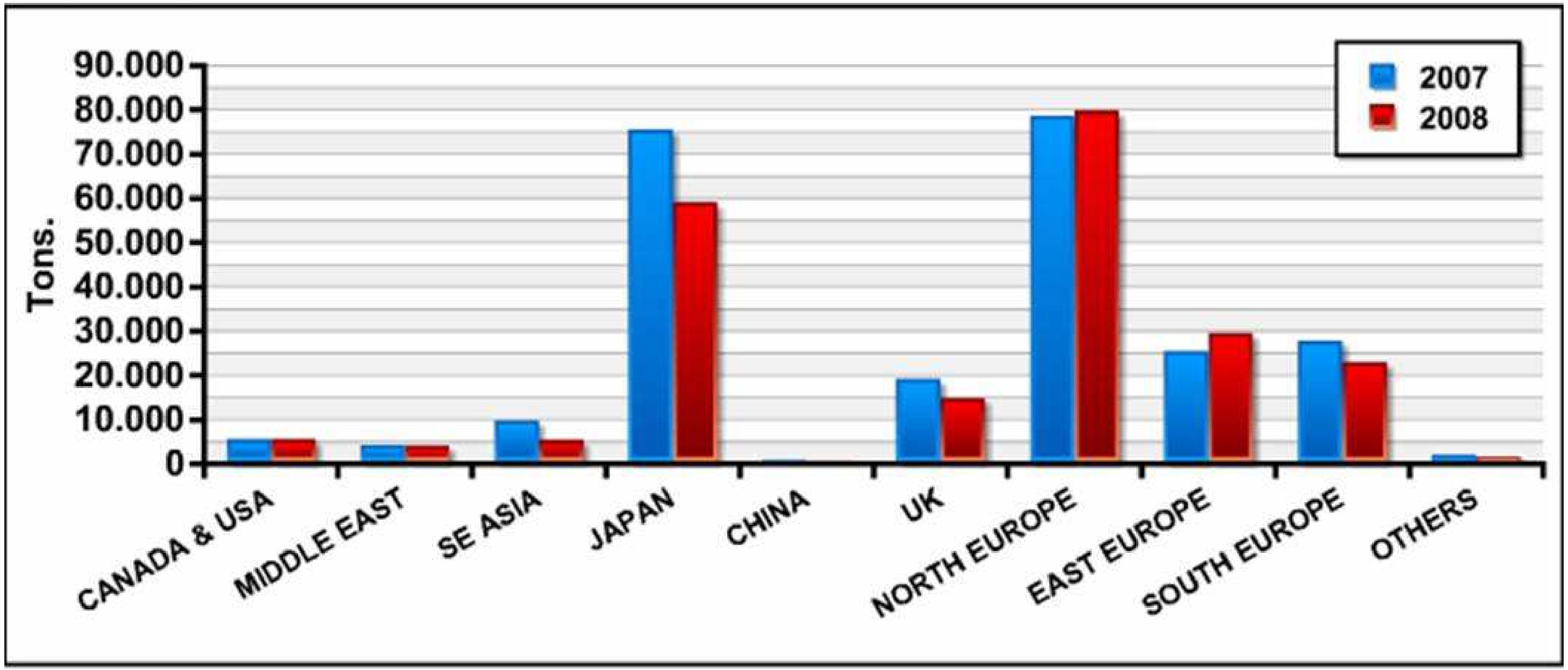
GRAPEFRUITS

Exports by Market



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THANKS

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