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"The worst thing the bad guys do is to make us doubt the good guys" (Jacinto Benavente)

The weekly letter: a new communication tool

We are pleased to present the first copy of our weekly AILIMPO newsletter, which joins the interprofessional's collection of communication tools. Our aim is to offer synthesized, objective, quality, verifiable and non-manipulable information. It is simply AILIMPO's commitment to transparency, so that the sector has the appropriate resources to guide the decision-making of all the links in the supply chain, generating added value and ultimately making the sector sustainable. **Communication is at the heart of AILIMPO's proposal to generate value.**

Spain is a reference and world leader in fresh lemon exports, the second country in industrial processing, and an increasingly important player in the grapefruit business. **Leading is not about appearing in the statistics, it is about acting, anticipating, innovating, cooperating, guiding and communicating.**

In this weekly letter we at AILIMPO will try to contribute our thoughts on the development of the business, extending the vision to the medium and long term, travelling into the future to read the right keys.



Some lessons learned from last year's 2020/2021 season

This business moves in the super short term, the perishable nature of the fruit keeps us on edge and does not allow us to look up from the day to day. Although it is already history, it is important to **take a few minutes to analyze what happened last season, try to retain some lessons and identify some mistakes so as not to repeat them.**

- **Total production:** More than 1,300,000 tonnes, in line with the AILIMPO estimate, breaking a record and showing the way for future crops in Spain, with more than 12 million lemon trees already planted, and we are still planting.
- **Total exports** of more than 700,000 tonnes, breaking an absolute record for the second year running. And the most difficult thing: this figure has been achieved in a complicated scenario, with the Food Service channel at minimum levels in Europe for many months, and with tourism practically non-existent. **We have to believe it!** Let's look back: in 2010, just 10 years ago, we estimated that Spain's lemon export ceiling was 550,000 tonnes. **So... we are doing very well.**
- **Processing:** another absolute record, with 415,000 tonnes processed. Spain has a modern industry, with installed capacity, which is subsidiary to the fresh business and which acts as an efficient regulating mechanism for volumes in the fresh market that has allowed practically all the fruit to be harvested from the trees. **What would have happened if processing did not exist in Spain?** Let everyone draw their own conclusions.

But it is not all light, there are also shadows or at least grey areas: Spain must open up and consolidate new markets outside the EU, a key aspect in the scenario of increasing production over the next few years. And let's not forget the invisible enemy: speculation (by farmers and exporters) which still appears at certain times of the season and only benefits a few, to the detriment of the vast majority.

Are all seasons different?

There is a widespread belief that every lemon season is different. I don't agree, in the basics all campaigns are the same. The problem is that we insist on not learning from the past and that is why we are facing a new campaign in September with a blank sheet of paper and a blank mind.

The journey of the Spanish Lemon and Grapefruit Campaign 2021/2022 has just begun, let's go for it!

20/21	Tons
EU EXPORTS	695,396
NON EU EXPORTS	31,182
DOMESTIC	184,392
LOSSES	45,549
PROCESSING	414,838
TOTAL	1,371,357