



Producer country sheet

Lemon in Spain

The second largest producer in the world, Spain clearly dominates the international lemon trade. Shipping 450 000 to 500 000 t, the exporters in the Murcia-Alicante area control nearly a third of the volumes traded in the world and supply the Eastern and Western European markets during the winter season. The economic balance of the sector depends mainly on the fresh market and has suffered a serious over-production crisis since the beginning of the 2000s. The problems are the result of a decrease in consumption in the EU and increased competition from Argentina and Turkey.

Location of the plantations

The area under lemon totals about 45 000 ha, more than 90% of which is between the southernmost part of the province of Alicante and the centre of the province of Murcia, less than some 50 kilometres from the coast. Most of the plantations are around the city of Murcia (the 'Huerta tradicional' of Murcia) and in the lower valleys of the rivers Segura (from Murcia to Almoradí) and Guadalentín (from Murcia to Alhama). The 'Campo de Cartagena' plantations complete production in the region. The climate is typically Mediterranean thanks to the rampart formed by the Baetic Cordillera. The very mild winters with minimum risk of frost are well-suited to this demanding crop. The aridity of the region (annual rainfall less than 100 mm) limits sanitary problems but means that irrigation is necessary (water from the Tagus is conveyed by a canal 400 km long). The rest of the Spanish lemon orchards are in Andalusia, in the Málaga and Almería regions where production structures are more modern. The number of small family type farms is tending to dwindle but this type of holding still accounts for a significant proportion of production, especially around Murcia.





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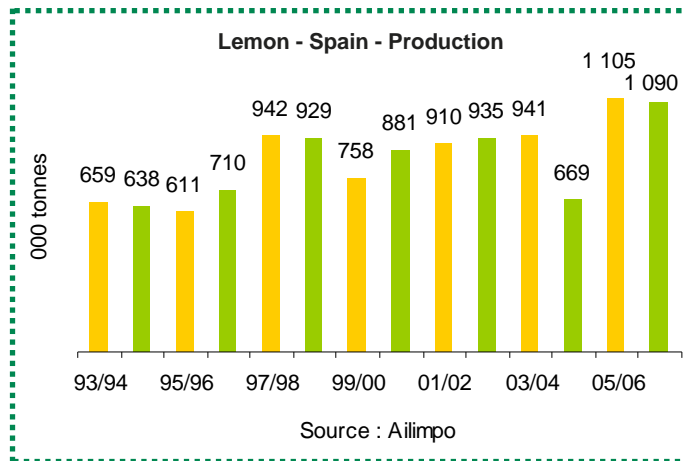
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Production

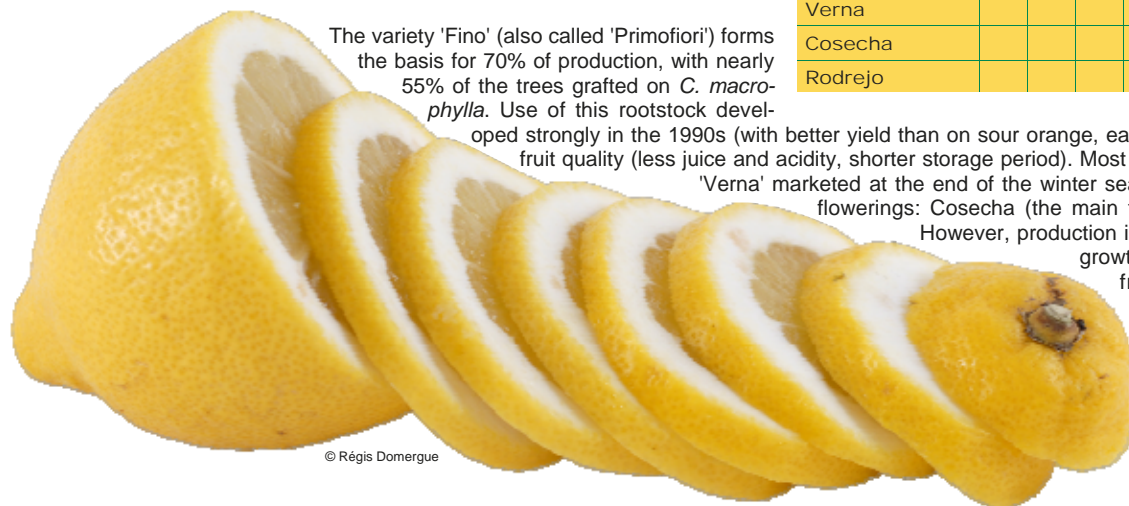
A traditional crop since the fifteenth century, lemons are one of the pillars of the economy of the region. A first production development move took place in the 1970s with the broadening of the varietal range. Increasing demand for fresh lemons from the Eastern European markets (especially Russia) generated another period of strong development from the mid-1990s, fed by the planting of very productive cultivars. However, increased competition from Turkey on these markets and from Argentina in the EU in the spring and autumn has limited outlets. The over-production crisis that has affected the sector since the early 2000s has taken the form of a social debate on the use of the increasingly scarce water resources in the region. A large-scale reconversion plan is being designed. The sector is supported by an interprofessional organisation, Ailimpo.



Varieties

The variety 'Fino' (also called 'Primofiori') forms the basis for 70% of production, with nearly 55% of the trees grafted on *C. macrophylla*. Use of this rootstock developed strongly in the 1990s (with better yield than on sour orange, earlier fruit, etc.) in spite of the poorer fruit quality (less juice and acidity, shorter storage period). Most of the rest of production consists of 'Verna' marketed at the end of the winter season. The latter variety has several flowerings: Cosecha (the main flowering), Secundus and Rodrejo. However, production is tending to decrease in the face of growth of the more competitive 'Eureka' from Argentina. A long-term programme of research on a substitute variety has been launched. A few plantations of 'Eureka' are also found.

Lemon — Spain — Production calendar											
	O	N	D	J	F	M	A	M	J	J	A
Primofiore/Fino											
Verna											
Cosecha											
Rodrejo											



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Lemon - Spain - Outlets

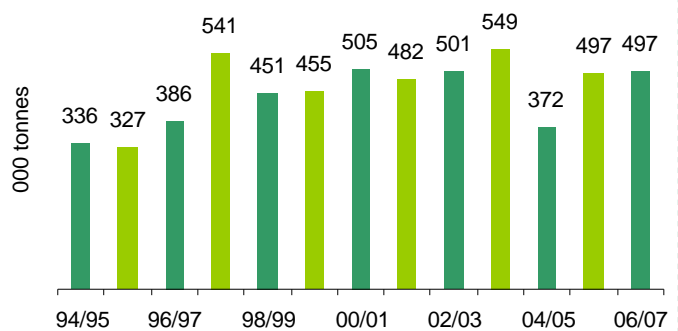
Source: Ailimpo

Outlets

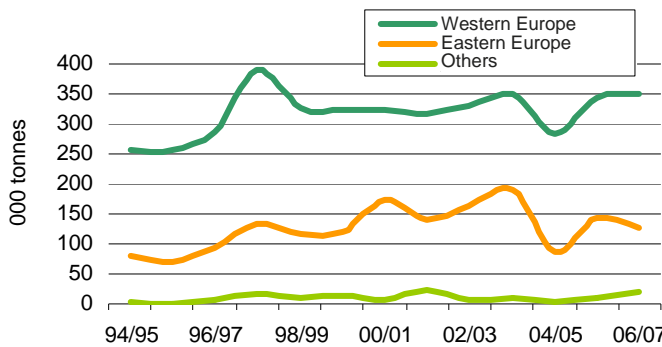
The sector is focused mainly on the fresh lemon market. This takes more than 70% of the harvest used and provides most of the returns for producers. Exports form the main outlet with annual volumes of some 450 000 to 500 000 t. The local market represents about 180 000 t. With 9 or 10 average-sized units, the processing industry has developed total capacity of approximately 300 000 t. The volumes handled are very irregular (120 000 to 240 000 t in recent seasons) as this outlet is not very profitable and is abandoned by growers when the fresh fruit market is favourable. The end of the system of direct aid for processing from the EU may change the balance of power in the coming years. A large proportion of production has been lost in recent years for lack of a market (more than 200 000 t in 2005-06 and 2006-07).

Exports

Exports grew strongly in the 1990s with the joint growth of the EU market and then that of the Eastern European markets from the middle of decade onwards. This period of development finished at the end of the 1990s. On the one hand, competition from Argentina had increased in the EU, resulting in difficulties in the sale of 'Verna', which had difficulty competing with 'Eureka' from South America and postponing the beginning of the 'Fino' season. On the other, the growth of shipments to the Eastern European markets weakened. The intensification of Turkish competition led to a decrease in shipments to these destinations from 2004-05 onwards and serious sector fragility. The export sector is very scattered, with about a hundred packing stations of significant size, eight of which

Lemon - Spain - Exports

Source : Ailimpo

Lemon - Spain - Exports by destination

Source : Ailimpo

handle about 50% of shipments. It is dominated by private enterprises, with the cooperative sector handling only 10 to 12% of the volumes. The anchorage of exporters in production is developing but is still limited, with three-quarters of supply purchased from independent growers via a middleman, the *corredor*. In the summer, Spanish packers handle a proportion of the fruits shipped to the EU from Argentina in a category management approach aimed at rationalising costs and service to customers

Logistics

The EU markets are supplied by road only. A proportion of the volumes transit via the Saint Charles platform near Perpignan in France. However, most of the fruits are shipped to the final client. It takes about three days to supply destinations in the United Kingdom.



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