

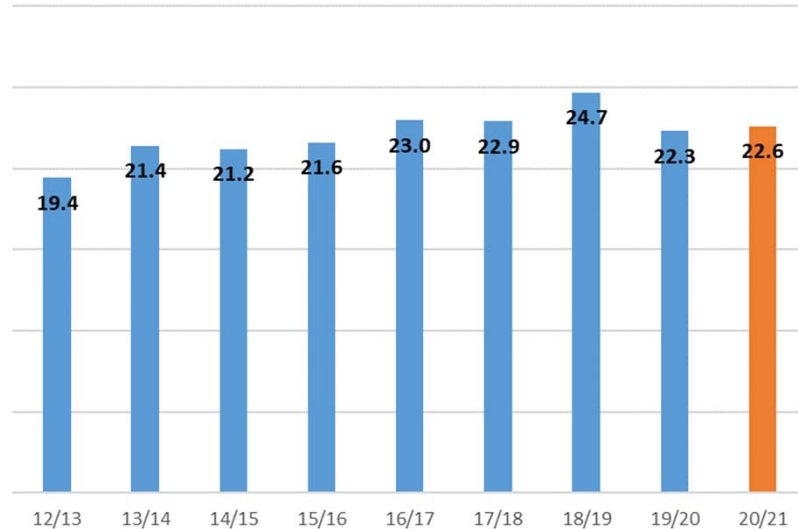
Forecast – winter season 20/21 - EU27+UK



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One of the shortest production of these last seasons

Mediterranean * citrus production
million t - USDA/FAO/Professionals sources



- Very large crop expected due to alternate bearing - finally not !

Climatic issues on both the eastern/western part of the Mediterranean – **leading export countries affected**

East : hot wind in May affecting Turkey, Egypt, Israel
Drought...again ...in Morocco
Spain: humidity/low temp in April

- 22.6 mt – 2nd shortest crop of the last 4 S.

+1%/ 19-20 // -3 / 4 season average

- COVID impact on demand ?
 - As strong as during the first wave for lemon / orange ? absolutely not the case for the moment
 - Impact on Easy Peelers ?
 - But surely as strong or worst on costs !
- Weather – bad effect for the moment
 - Too hot in the production area – rapid evolution of the fruits
 - Not cold enough to stimulate consumption



Mediterranean = Spain, Turkey, Egypt, Italy, Morocco, Greece, Tunisia, Israel, Cyprus

Soft citrus: heavy volumes expected in November/December

| Mediterranean Soft Citrus - Production Forecast 2020-21 | | | |
|---|--------------|------------|----------------|
| | 2020-21 | Comp | |
| 1000t | | 19/20 | / 4yrs average |
| Spain | 2,369 | 30% | 11% |
| Turkey | 1,450 | 4% | 0% |
| Morocco | 1,040 | 12% | -13% |
| Italy | 824 | 8% | 15% |
| Israel | 185 | 3% | -5% |
| Greece | 174 | -2% | -1% |
| Total | 6,042 | 15% | 3% |

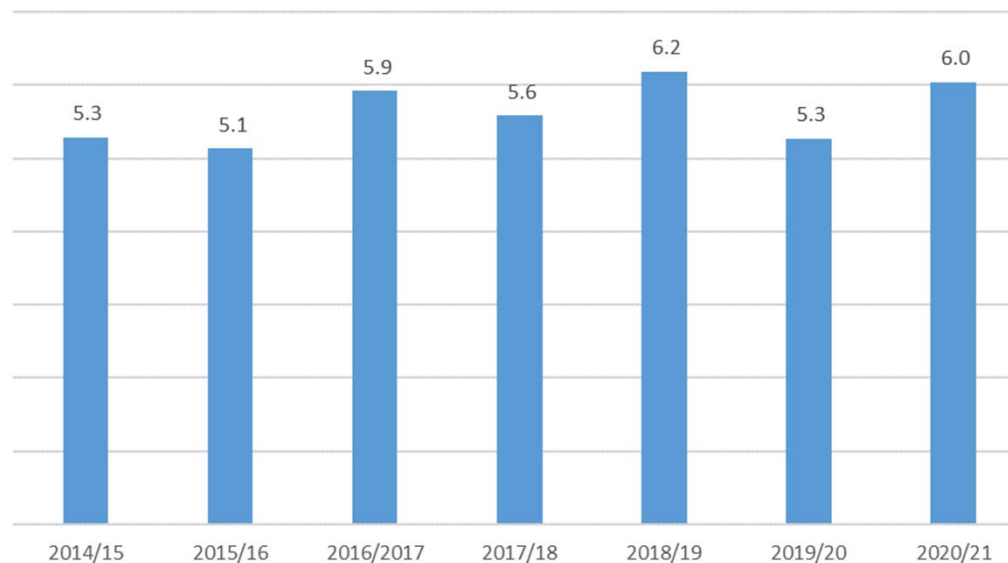
Sources: WCO, CLAM, professional estimate

- Leading exporters: +3% = an average season?

- Not really : Average season in Turkey and shortage in Morocco but big crop in Spain (70% of the EU supply)
- Export increase may be a bit lower than the production one - low sizing / evolution of the weather - keeping qualities ?
- Very large volumes in Nov/Dec
- Similar to the 19/20 or late hybrids

Soft citrus : production - main Mediterranean

1 000 t - WCO, CLAM, professional estimate



Oranges: an average season, but an irregular distribution

| Mediterranean Orange - Production Forecast 2020-21 | | | |
|--|---------------|-----------|------------|
| 1 000t | Comparison | | |
| | 2020-21 | 19/20 | |
| Spain | 3,448 | 4% | -3% |
| Egypte* | 3,100 | 3% | -1% |
| Italy | 1,600 | 25% | 12% |
| Turkey | 1,300 | -24% | -29% |
| Morocco | 920 | 14% | -9% |
| Greece | 859 | -7% | -6% |
| Total | 11,227 | 2% | -6% |

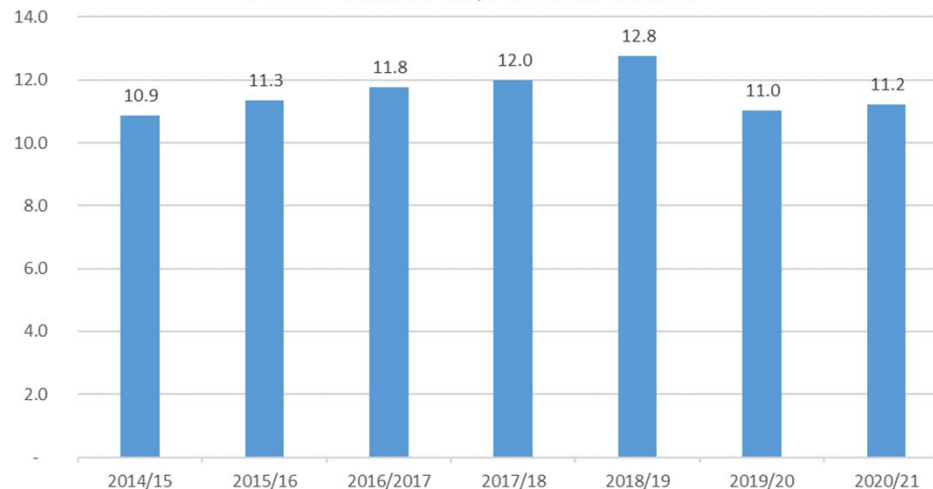
Sources: WCO, CLAM, professional estimate

- Mediterranean production: -6%

- Mainly due to the decrease of Morocco/Turkey – very little impact on the EU27+UK market
- For the key EU27+UK suppliers : a close to average season (Spain – Egypt : 75/80% of the supply)
- Export potential may be a bit lower – sizing issues evolution of the weather - keeping qualities ?
- A very irregular distribution : above average production during the first part of the season (large Navelina crop in Spain) – below average crop for late juice / table orange

Orange: Production - Main Mediterranean

1 000 t - WCO, CLAM, professional estimate



Lemon: a large supply to the EU 27 + UK, in spite of a slight production shortage

- Leading producers: -4%

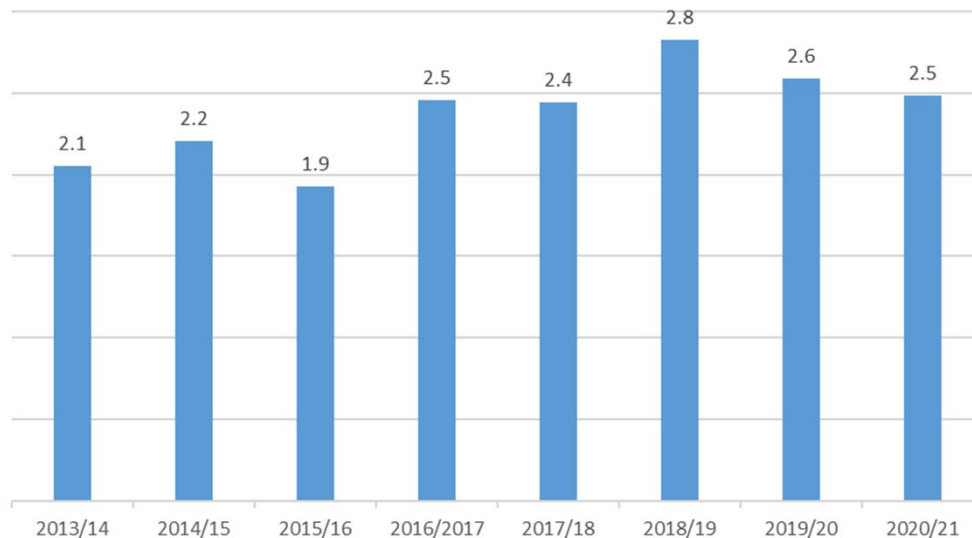
| Mediterranean Lemon - Production Forecast 2020-21 | | | |
|---|--------------|------------|----------------|
| 1 000t | 2020-21 | Comparison | |
| | | 19/20 | / 4yrs average |
| Spain | 1,291 | 8% | 11% |
| Turkey | 700 | -26% | -28% |
| Italy | 491 | 10% | 12% |
| Total | 2,482 | -4% | -4% |

Sources: WCO, CLAM, professional estimate

- Mainly due to a very sharp decrease of the Interdonato in Turkey – impact mainly on the early market (Sep/Oct.)
- Large volumes in Spain (for both Fino /Verna) / Italy 80% of the EU 27+UK supply =>heavy volumes available from November to the end of the season
- Export potential may be a bit lower
 - sizing issues in Spain
 - Impact of Mal Seco on organic in Italy

Lemon : production - main Mediterranean

1 000 t - WCO, CLAM, professional estimate



Grapefruit: a very short crop, for both tropical and Mediterranean grapefruit

| Mediterranean Grapefruit -Production Forecast 2019-20 | | | |
|---|------------|-------------|----------------|
| 1 000t | 2020-21 | Comparison | |
| 1000t | | 19/20 | / 4yrs average |
| Turkey* | 220 | -12% | -13% |
| Israël | 120 | -17% | -17% |
| Spain | 74 | -1% | -5% |
| Total | 414 | -12% | -13% |

Sources: Ailimpo, MarocCitrus, ISTAT, USDA, *professional

| Tropical Grapefruit -Production Forecast 2019-20 | | | |
|--|------------|------------|----------------|
| 1 000t | 2020/21 | Comparison | |
| 1000t | | 19/20 | / 4yrs average |
| Florida | 174 | -8% | -15% |
| Texas | 178 | 11% | -2% |
| Total | 352 | -5% | -9% |

Sources: WCO, CLAM, professional estimate

Leading producers: Medit : -13% / Trop.: -9%

- All Mediterranean suppliers down to significantly down
- Stiff competitiveness of Turkey – Turkish Lira down
 - 10/11 euros for good sizes week 47
- Production decrease not the main issue for tropical grapefruit:
 - Custom duty at the EU border +25% from the end of November (entry in the EU)
Airbus /Boeing dispute
- Structural erosion of the demand has to be considered

Grapefruit : production - EU28 Leading suppliers

1 000 t - WCO, CLAM, professional estimate

