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Spain

Canned Deciduous Fruit

Annual

2000

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Report Highlights:

Spain's canned peach production is expected to increase slightly during the 2000/01 campaign, due to a higher fresh product availability. Canned pear production is expected to decrease. U.S. exporters have limited potential in this market.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Madrid [SP1], SP

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Executive Summary

Total Spanish 2000/01 peach crop is estimated at 1,044,575, about 11 percent higher than during the previous year. On the other hand, unfavorable weather conditions due to freezes in Spring, an irregular blossoming and hail storms during the blooming period in the main pear producing areas, significantly reduced the Spanish 2000/01 pear crop. Farmers' organizations peg total 2000/01 pear crop at 586,840 tons, about 14 percent below the previous year. Spain's canned peach output is forecast to be slightly higher than during the previous season. Spanish canned pear production is forecast to decrease slightly due to a shorter fresh production. Consumption of canned fruit is difficult to determine. Regarding trade, Spain's canned peach exports are forecast to increase in 2000/01, while pear exports might decrease. Spain's canned fruit imports, minor in comparison with production and exports, are forecast to remain at similar levels in 2000/01. As Spain is a major producer and exporter of canned fruits, U.S. exporters have limited potential in this market..

Note: Current exchange rate is:

- 198 pesetas/\$1.00.
- 1 Euro = 166.38 Pesetas
- 1 Euro = \$0.84

Production

A. Canned Peaches

Spain's 2000/01 canned peach production is estimated at 183,000 tons. A total of about 165,000 metric tons of fresh peaches is expected to be delivered to the canning industry during this marketing year, reflecting the increase of fresh production. The Spanish fresh peach crop for the current campaign is estimated at 1,044,575 metric tons, an 11 percent increase from last year. Fresh peaches used for canning in Spain are the clingstone variety.

B. Canned Pears

The Spanish canned pear production in 2000/01 is estimated at 37,700 metric tons, slightly below the previous year. An estimated 33,000 metric tons of Williams and Rocha pears will be delivered to the industry.

Consumption

There are no distinguishing trends in Spain's canned fruit consumption, other than year-to-year fluctuations reflecting changes in supply. Underlying demand remains stable, and consumption is forecast to remain fairly stable in 2000/01.

Trade

A. Peaches

Driven by a higher Spanish production, in comparison with the previous marketing year, canned peach imports are estimated to have decreased in 1999/2000. With a further increase in domestic output expected in 2000/01, imports are forecast to slightly decrease again.

Spanish peach exports during 1999/2000 are estimated to have increased dramatically, reaching normal levels, although not as high as during MY 97/98, when Spanish canned exports reached a record level of 91,540 metric tons, due to a shorter output in other EU canned peach producing countries. Canned peach exports during the first ten months of marketing year 1999/2000 (July-99/April-2000) were 65,912 metric tons, about 28 percent above the previous year. Spanish canned peach exports to EU countries represented about three-fourths of total exports. Exports in 2000/01 are forecast to increase slightly, due to a record crop in EU other countries, like Greece.

B. Pears

Supplied almost exclusively by other EU countries and South Africa, Spain's total canned pear imports are insignificant, reaching only 454 metric tons during the period July 99/April 2000.

Spanish exports of canned pears during July 99/April 2000 reached 13,909 metric tons, a 43 percent increase from the corresponding period a year earlier. A decrease is expected in 2000/01 due to shortage of the fresh product availability. The EU continues to be by far the main customer for Spain's canned pears, accounting for about 85 percent of total exports.

Policy

The EU Commission has prepared the new Common Market Organization (CMO) proposal for Processed Fruits and Vegetables. It is expected that it will be approved in November 2000. The proposal is an amendment to EC Regulations 2200/96, 2201/96 and 2202/96. One change contained in the proposal is the discontinuation of the minimum price paid to farmers for fresh fruit delivered to the industry. This will be more in line with the market reality, as peaches is one of the few agricultural products that maintains a minimum price. Prices will be more flexible and in accordance with product availability. No large increases in canned peach production are expected, as it is regulated by the demand. The total EC processing threshold for peaches will be established at 504,594 metric tons and 104,378 for pears, of which 180,794 metric tons and 35,199 metric tons, respectively, will be assigned to Spain.

A. Peaches

EU Regulation 1237/2000, of June 14, 2000, fixes for the 2000/01 marketing year the minimum price to be paid to producers for peaches and the amount of production aid for peaches in syrup and/or natural fruit juice at 28,368 EUR/100 Kg net and 4,134 EUR/100 Kg. net, respectively.

B. Pears

EU Regulation 1285/2000, of June 19, 2000, establishes for the marketing year 2000/01, the minimum price to be paid to producers for Williams and Rocha pears and the amount of production aid for Williams and Rocha pears in syrup and/or natural fruit juice at 35,552 EUR/100 Kg net, and 11,348 EUR/100 Kg net, respectively.

P,S&D Canned Peaches

PSD Table						
Country	Spain					
Commodity	Canned Peaches				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		06/1998		06/1999		06/2000
Deliv. To Processors	156000	156000	160000	164500	0	165000
Beginning Stocks	3050	3050	14700	14700	14000	17000
Production	170000	170000	174000	182000	0	183000
Imports	4700	4700	2000	3800	0	2000
TOTAL SUPPLY	177750	177750	190700	200500	14000	202000
Exports	56500	56500	70000	70000	0	72000
Domestic Consumption	106550	106550	106700	113500	0	114000
Ending Stocks	14700	14700	14000	17000	0	16000
TOTAL DISTRIBUTION	177750	177750	190700	200500	0	202000

Export Trade Matrix - Canned Peaches

Export Trade Matrix			
Country	Spain		
Commodity	Canned Peaches		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.	4052	U.S.	1578
Others		Others	
Germany	17221	Germany	11307
France	13245	France	11137
Portugal	11138	Portugal	8503
United Kingdom	9140	United Kingdom	7195
Mexico	2594	Mexico	2292
Belgium	2149	Belgium	1944
Netherlands	2009	Netherlands	1167
		Poland	1123
Total for Others	57496		44668
Others not Listed	10518		10287
Grand Total	72066		56533

Import Trade Matrix - Canned Peaches

Import Trade Matrix			
Country	Spain		
Commodity	Canned Peaches		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	2
Others		Others	
South Africa	1131	Greece	1411
France	912	South Africa	1220
Argentina	485	France	845
Germany	315	Germany	688
Italy	150		
Total for Others	2993		4164
Others not Listed	384		158
Grand Total	3377		4324

P,S&D Canned Pears

PSD Table						
Country	Spain					
Commodity	Canned Pears				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		06/1998		06/1999		06/2000
Deliv. To Processors	45500	45500	33500	33300	0	33000
Beginning Stocks	1900	1900	4200	8200	500	900
Production	48000	48000	36900	36200	0	35800
Imports	170	170	500	500	0	1000
TOTAL SUPPLY	50070	50070	41600	44900	500	37700
Exports	11400	11400	8000	15000	0	10500
Domestic Consumption	34470	30470	33100	29000	0	26000
Ending Stocks	4200	8200	500	900	0	1200
TOTAL DISTRIBUTION	50070	50070	41600	44900	0	37700

Export Trade Matrix - Canned Pears

Export Trade Matrix			
Country	Spain		
Commodity	Canned Pears		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.	325	U.S.	111
Others		Others	
France	4336	Germany	3841
Germany	2903	France	3213
United Kingdom	1626	United Kingdom	2050
Netherlands	778	Netherlands	654
Portugal	482	Portugal	613
		Belgium	406
Total for Others	10125		10777
Others not Listed	2544		2510
Grand Total	12994		13398

Import Trade Matrix - Canned Pears

Import Trade Matrix			
Country	Spain		
Commodity	Canned Pears		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
South Africa	100	Germany	210
Italy	43	South Africa	144
France	36	Greece	65
Germany	35		
Portugal	19		
Total for Others	233		419
Others not Listed	4		29
Grand Total	237		448