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Spain

Tree Nuts

Semi-Annual

2006

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Report Highlights:

Spain will likely experience continued strong import demand for almonds and hazelnuts during marketing year (MY) 2006/07, due to strong exports of processed almonds/products, and the continuing potential for a drought-reduced new crop. We forecast Spanish MY 2006/07 almond (shelled basis) imports at 42,000 metric tons (MT) (39,000 MT in MY 2005/06), and hazelnuts to be at 14,000 MT (15,000 MT in MY 2005/06). (LR20SH3)

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Madrid [SP1]
[SP]

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Executive Summary

- Spanish almond imports (shelled basis) during MY (September to August) 2006/07 will up slightly from MY 2005/06, because of the continued drought (second consecutive year), which has a production-limiting potential again this year. Winter temperatures have been good and there has been some moisture, but meteorologists are suggesting that an end to the current drought is not yet in sight.
- The Spanish confection industry will continue importing, processing, and exporting final product at a strong pace, which when combined with stable domestic consumption will likely lead to the need for continued strong imports during MY 2006/07.
- The latest data we have seen indicates that domestic almond consumption during MY 2005/06 is off somewhat from our previous estimate. As a result, we have revised our MY-2005/06 and MY-2006/07 consumption estimate/forecast.
- We expect Spanish MY 2005/06 imports of almonds at 39,000 MT, down from 59,095 MT during MY 2004/05 when Spain experienced a virtual almond crop failure.
- In MY 2006/07, hazelnut imports will likely be down slightly from MY 2005/06 at some 14,000 MT, off from MY 2005/06, 15,000 MT (9,681 MT in MY 2004/05), as a likely result of a drought-reduced new crop.
- Almonds (in-shell) are currently being traded in Mercabana, the Barcelona wholesale market, for 4.80 €/Kg (3.60 €/Kg) a year ago. Hazelnuts (in-shell) are being sold for the same prices.
- For information regarding the market access conditions for exports of U.S. tree nuts to Spain, please see our report No. SP6002.

Commodity Name: Almonds

Production, Supply & Distribution Table

PSD Table

Country

Spain

Commodity

Almonds, Shelled Basis

(HA)(1000
TREES)(MT)

	2004		Revised	2005	Estimate	2006	Forecast
	USDA Official [Old]	Post Estimate [New]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin	09/2004			09/2005		09/2006	
Area Planted	658,800	658,800		660,000	660,000	660,000	660,000
Area Harvested	641,700	641,700		641,700	641,700	641,700	641,700
Bearing Trees	0	0		0	0	0	0
Non-Bearing Trees	0	0		0	0	0	0
Total Trees	0	0		0	0	0	0
Beginning Stocks	8,000	8,000		5,182	1,582	4,182	1,432
Production	26,182	25,920		61,000	62,850	65,000	61,000
Imports	63,000	58,095		40,000	39,000	37,000	42,000
TOTAL SUPPLY	97,182	92,015		106,182	103,432	106,182	104,432
Exports	41,000	39,433		50,000	50,000	51,000	52,000
Domestic Consumption	51,000	51,000		52,000	51,000	52,000	51,000
Ending Stocks	5,182	1,582		4,182	2,432	3,182	3,432
TOTAL DISTRIBUTION	97,182	92,015		106,182	103,432	106,182	105,432

Trade

Import Trade Matrix**Country**

Spain

Commodity

Almonds, Shelled Basis

Time Period	Sep/Aug	Units:	Metric Tons
Imports for:	2003		2004
U.S.	52,308	U.S.	48,786
Others		Others	
France	3,218	Italy	2,612
Italy	939	France	1,999
Portugal	691	Greece	766
Germany	366	Portugal	533
Netherlands	247	Germany	207
Other EU	224	Other EU	325
Chile	347	Australia	881
Australia	185	Chile	692
Morocco	101	Tunisia	696
		Turkey	243
Total for Others	6,318		8,954
Others not Listed	29		355
Grand Total	58,655		58,095

Export Trade Matrix**Country**

Spain

Commodity

Almonds, Shelled Basis

Time Period	Sep/Aug	Units:	Metric Tons
Exports for:	2003		2004
U.S.	135	U.S.	336
Others		Others	
Germany	16,138	Germany	13,360
France	7,127	France	7,423
Italy	6,597	Italy	3,799
Netherlands	3,541	Netherlands	3,497
Belgium	2,793	Belgium	2,538
Portugal	1,825	U.K.	1,501
U.K.	1,511	Portugal	1,197
Other EU	4,046	Other EU	3,422
Switzerland	1,235	Switzerland	1,295
Ceuta	231	Norway	207
Total for Others	45,044		38,239
Others not Listed	1,035		858
Grand Total	46,214		39,433

Commodity Name: Hazelnuts

Production, Supply and Distribution Table

PSD Table

Country
CommoditySpain
Filberts, Inshell
Basis(HA)(1000
TREES)(MT)

Market Year Begin	2004	Revised	2005	Estimate	2006	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
	09-2004		09-2005		09-2006	
Area Planted	26,000	26,000	26,000	26,000	26,000	26,000
Area Harvested	21,600	21,600	21,600	21,600	21,600	21,600
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Beginning Stocks	5,000	5,000	4,200	2,420	3,400	3,520
Production	25,700	25,700	18,200	22,100	20,000	20,000
Imports	10,000	9,681	14,000	15,000	13,000	14,000
TOTAL SUPPLY	40,700	40,381	36,400	39,520	36,400	37,520
Exports	10,500	11,961	6,000	9,000	6,500	9,000
Domestic Consumption	26,000	26,000	27,000	27,000	28,000	27,000
Ending Stocks	4,200	2,420	3,400	3,520	1,900	1,520
TOTAL DISTRIBUTION	40,700	40,381	36,400	39,520	36,400	37,520

Trade

Import Trade Matrix**Country**

Spain

Commodity

Filberts, Inshell Basis

Time Period

Sep/Aug

Units:

Metric Tons

Imports for:

2003

2004

U.S.

831

U.S.

878

Others

Others

France	872	Italy	703
Italy	551	France	455
Other EU	355	Other EU	341
Turkey	12,112	Turkey	7,073
Georgia	142	Georgia	155
Azerbaijan	104		
Total for Others	14,136		8,727
Others not Listed	38		76
Grand Total	15,005		9,681

Export Trade Matrix**Country**

Spain

Commodity

Filberts, Inshell Basis

Time Period

Sep/Aug

Units:

Metric Tons

Exports for:

2003

2004

U.S.

1

U.S.

2

Others

Others

Germany	2,546	Germany	5,987
Poland	1,537	Italy	2,207
Italy	1,401	Poland	1,123
France	720	France	1,056
Other EU	886	Other EU	655
Venezuela	493	Venezuela	533
Brazil	79	Mexico	124
		Ceuta	115
Total for Others	7,662		11,800
Others not Listed	338		159
Grand Total	8,001		11,961

Total Nut Trade in Value

SPAIN: Total Nut imports in 1,000 USD

		Marketing Year:				
		2000/01	2001/02	2002/03	2003/04	2004/05
0801	Coconuts, Brazil Nuts & Cashew Nuts, Fresh Or Dry	13,129	13,218	17,259	19,961	27,164
080111	Coconuts, Dessicated	2,372	2,889	3,929	3,025	4,335
080119	Coconuts, Other Than Dessicated	1,525	1,461	1,818	1,425	2,188
080121	Brazil Nuts, Fresh Or Dried, In Shell	2,466	1,502	2,945	887	1,827
080122	Brazil Nuts, Fresh Or Dried, Shelled	852	1,370	1,364	2,377	3,173
080131	Cashew Nuts, Fresh Or Dried, In Shell	1,483	1,157	845	537	617
080132	Cashew Nuts, Fresh Or Dried, Shelled	6,803	7,728	10,287	14,736	19,358
0802	Nuts Nesoi, Fresh Or Dried	206,955	237,121	306,164	484,328	573,538
080211	Almonds, Fresh Or Dried, In Shell	2,748	1,841	2,248	2,324	7,725
080212	Almonds, Fresh Or Dried, Shelled	73,877	103,619	143,290	230,647	330,914
080221	Hazelnuts Or Filberts, Fresh Or Dried, In Shell	1,692	1,668	1,762	2,134	2,017
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	13,319	14,647	13,715	23,393	27,689
080231	Walnuts, Fresh Or Dried, In Shell	38,137	37,754	35,318	38,985	43,494
080232	Walnuts, Fresh Or Dried, Shelled	14,386	14,060	17,894	22,367	28,838
080240	Chestnuts, Frsh Or Dried, W/Nt Shelled Or Peeled	2,623	2,628	4,585	8,084	4,645
080250	Pistachios, Fresh Or Dried, Shelled Or Not	48,869	48,489	64,634	125,837	89,090
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	11,305	12,415	22,719	30,558	39,124
Total		220,084	250,339	323,423	504,290	600,701

SPAIN: Total Nut imports from the U.S. in 1,000 USD

		Marketing Year:				
		2000/01	2001/02	2002/03	2003/04	2004/05
0801	Coconuts, Brazil Nuts & Cashew Nuts, Fresh Or Dry	0	0	52	0	5
080111	Coconuts, Dessicated	0	0	12	0	5
080121	Brazil Nuts, Fresh Or Dried, In Shell	0	0	40	0	0
0802	Nuts Nesoi, Fresh Or Dried	107,931	130,046	168,328	249,455	340,532
080211	Almonds, Fresh Or Dried, In Shell	74	116	744	1,037	5,301
080212	Almonds, Fresh Or Dried, Shelled	68,769	92,679	128,238	204,951	272,008
080221	Hazelnuts Or Filberts, Fresh Or Dried, In Shell	795	1,096	1,028	1,606	1,530
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	41	0	0	0	567
080231	Walnuts, Fresh Or Dried, In Shell	30,505	27,222	26,860	28,243	33,162
080232	Walnuts, Fresh Or Dried, Shelled	7,480	6,930	8,620	12,406	18,157
080250	Pistachios, Fresh Or Dried, Shelled Or Not	107	1,856	2,640	846	9,480
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	161	146	198	367	327
Total		107,931	130,046	168,380	249,455	340,537
	Share in Total Trade -----	49.0	51.9	52.1	49.5	56.7

Source: Global Trade Atlas

Spain: Total Nut Exports (1,000 USD)

	Marketing Year:	2000/01	2001/02	2002/03	2003/04	2004/05
0801	Coconuts, Brazil Nuts & Cashew Nuts, Fresh Or Dry	928	947	1,166	1,295	1,588
080111	Coconuts, Dessicated	243	280	345	269	413
080119	Coconuts, Other Than Dessicated	242	475	380	242	388
080121	Brazil Nuts, Fresh Or Dried, In Shell	174	29	64	49	71
080122	Brazil Nuts, Fresh Or Dried, Shelled	3	34	25	28	18
080131	Cashew Nuts, Fresh Or Dried, In Shell	38	6	9	168	360
080132	Cashew Nuts, Fresh Or Dried, Shelled	228	122	343	539	339
0802	Nuts Nesoi, Fresh Or Dried	184,969	208,681	283,336	320,805	390,781
080211	Almonds, Fresh Or Dried, In Shell	4,476	6,178	7,164	10,882	14,002
080212	Almonds, Fresh Or Dried, Shelled	140,462	162,879	224,257	232,407	274,848
080221	Hazelnuts Or Filberts, Fresh Or Dried, In Shell	121	292	435	511	364
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	15,126	9,028	11,214	13,666	40,943
080231	Walnuts, Fresh Or Dried, In Shell	994	1,050	1,679	2,350	2,569
080232	Walnuts, Fresh Or Dried, Shelled	1,306	1,179	1,971	1,788	3,180
080240	Chestnuts, Frsh Or Dried, W/Nt Shelled Or Peeled	6,473	8,968	9,885	22,398	15,706
080250	Pistachios, Fresh Or Dried, Shelled Or Not	1,889	3,378	3,087	6,369	6,239
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	14,121	15,728	23,644	30,433	32,930
Total		185,897	209,627	284,502	322,100	392,370

Spain: Total Nut Exports to U.S. (1,000 USD)

	Marketing Year:	2000/01	2001/02	2002/03	2003/04	2004/05
0801	Coconuts, Brazil Nuts & Cashew Nuts, Fresh Or Dry	0	0	6	0	0
080132	Cashew Nuts, Fresh Or Dried, Shelled	0	0	6	0	0
0802	Nuts Nesoi, Fresh Or Dried	929	1,624	2,369	2,573	4,603
080212	Almonds, Fresh Or Dried, Shelled	46	374	483	935	3,125
080231	Walnuts, Fresh Or Dried, In Shell	304	29	0	160	181
080232	Walnuts, Fresh Or Dried, Shelled	0	36	1,083	758	721
080240	Chestnuts, Frsh Or Dried, W/Nt Shelled Or Peeled	115	543	2	0	33
080290	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	464	642	801	720	543
Total		929	1,624	2,375	2,573	4,603

Source: Global Trade Atlas