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Spain

Fresh Deciduous Fruit

Annual

2005

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Report Highlights:
Spanish deciduous fruit producers will likely improve its competitive trade position during marketing year (MY) 2005/06, vis-à-vis 2004/05, because of excellent quality and greater production. The European Commission (EC) has delayed fruit and vegetable policy reform under the Common Agricultural Policy (CAP) until late 2006. We anticipate that the reform will introduce some subsidy decoupling and an integration of at least part of farmer subsidies in the Single Farm Payment. (LR50CM2PM8SH4)

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

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Executive Summary

- We forecast Spanish MY 2005/06 fresh apples, pears and table grape trade to recover from last year's near-record levels. Imports will approach more normal levels, but still higher than the recent Olympic average. Spanish exports will likely but up from last year's near-record lows, but again will not achieve Olympic-average levels.

- Production and quality will likely be up from last year, even with, and in fact because of the severe drought that has devastated non-irrigated crops. About 75 percent of Spanish deciduous fruit production is under irrigation, which has spared most Spanish fruit producers from the devastating drought conditions faced by other Spanish producers (see SP5004 and SP5024 for more on the drought). We expect fruit quality to be very good this year, as there has been nothing but sun this year.

- As a result, U.S. apple producers and exporters will likely have stiffer competition in third-country markets from Spanish exporters this marketing year, when compared to last, but even with the increased local production, will continue to have niche-market opportunities in the Spanish fresh-apple market.

- Spanish producers benefit from the common fruit and vegetables regime under the CAP. Fresh apple, pear, grape and canning pear producers receive fruit withdrawal subsidies, and benefit from subsidization of "operational programs" developed by their producer organizations (PO). However, the EC may be proposing revisions to fruit and vegetable policies sometime next year. We believe the EC will be consistent with other CAP reform, which will likely mean more market-oriented policies, including use of the Single Farm Payment (SFP) to support producers.

Commodity Name: Fresh Apples

Production, Supply & Distribution Table

PSD Table						
Country	Spain					
Commodity	Apples, Fresh			(HA)(1000 TREES)(MT)		
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin	07/2003		07/2004		07/2005	
Area Planted	40,745	43,000	42,506	43,000	0	43,000
Area Harvested	35,000	37,305	38,000	37,000	0	37,000
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
Commercial Production	755,100	786,400	550,400	539,100	0	690,000
Non-Comm. Production	36,000	35,000	26,500	30,000	0	30,000
TOTAL Production	791,100	821,400	576,900	569,100	0	720,000
TOTAL Imports	235,686	235,324	318,100	280,000	0	260,000
TOTAL SUPPLY	1,026,786	1,056,724	895,000	849,100	0	980,000
Domestic Fresh Consump	735,000	750,000	730,000	610,000	0	710,000
Exports, Fresh Only	112,633	112,773	65,000	85,000	0	90,000
For Processing	159,153	182,475	85,000	150,478	0	175,000
Withdrawal From Market	20,000	11,476	15,000	3,622	0	5,000
TOTAL UTILIZATION	1,026,786	1,056,724	895,000	849,100	0	980,000

Production

SPAIN: Apple Production by Key Variety Types (1999 = MY 1999/2000, etc.)

Units: Metric Tons

MY:	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Cider Apples	71,520	35,338	67,861	30,289	23,000	23,000	29,000
Starking	198,479	172,179	80,387	69,241	57,000	57,000	72,000
Golden Delicious	481,708	368,413	470,617	362,645	435,000	300,000	380,000
Other	236,716	237,850	298,544	232,647	306,400	189,100	239,000
Total	**988,423**	**813,780**	**917,409**	**694,822**	**821,400**	**569,100**	**720,000**

Source: MAPYA Agricultural Yearbooks until 2002. MAPYA Avances, June 2005, for total production in MY 2003, 2004 and 2005; FAS Office estimate for variety breakdown for same years.

Spain: Apples Production by Autonomous Community

Units: Metric Tons

Prod. By Region	1999	2000	2001	2002	2003	2004	2005	Var. (*)
Cataluña	466,844	389,474	384,697	264,327	377,600	310,700	378,800	21.9
Aragón	232,856	203,989	241,163	194,197	201,400	79,500	155,000	95.0
Galicia	86,268	93,285	93,102	98,085	116,000	71,500	n,a,	-
P. de Asturias	45,000	5,500	50,000	8,015	5,000	3,000	n,a,	-
Castilla y Léon	51,708	20,610	37,531	24,040	24,800	23,000	n,a,	-
La Rioja	18,604	24,139	31,285	28,058	24,500	17,000	n,a,	-
Navarra	9,732	9,199	9,354	15,274	20,100	19,600	n,a,	-
R. de Murcia	15,456	10,827	10,100	11,969	11,700	11,500	n,a,	-
Pais Vasco	12,080	9,808	9,480	11,557	3,800	3,800	n,a,	-
Castilla La Mancha	14,663	9,918	14,831	11,644	7,300	6,800	3,700	-45.6
Andalucia	15,153	14,012	13,799	9,463	9,300	8,500	3,000	-64.7
Comunidad Valenciana	11,062	9,216	10,506	10,576	10,800	5,600	3,800	-32.1
Other	8,997	13,803	11,561	7,617	9,100	8,600	175,700	-
TOTAL	988,423	813,780	917,409	694,822	821,400	569,100	720,000	26.5

Source: MAPYA. Note: Data for 1999 to 2003 is definite. Data for 2004 and 2005 is preliminary. (*) 2005 output variation relative to 2004 levels, in percentage.

- Dry spring weather conditions, and absence of late spring frosts in CY-2005 favored apple tree blooming and pollination, conducing to higher yields in MY 2005/06 than in MY 2004/05. The severe drought that has swept across Iberia since the fall of CY 2004 affected mildly the maturation of the fruit. The MY 2005/06 apple crop comes in six percent under the previous 5-year average.

- About half of Spanish apple trees are less than 10 years old, and only some 10 percent are over 25 years. About three quarters of the apple crop is produced under irrigation.

- Areas planted to bi-color varieties like Gala and Fuji have been increasing, displacing orchards with traditional varieties such as Starking and Golden.

- About 80 percent of the Spanish apple crop is concentrated in the Ebro river basin in the northeast of Spain.

- For data on apple production breakout by region and key varieties, please check tables above.

Consumption

- Spanish apple demand is considerably price-elastic, and fluctuates with the level of crop and domestic prices. Nevertheless, recent studies reveal an overall declining trend of domestic apple consumption. Apples are being displaced by imported tropical fruit, and by the increasing popularity of new desserts.

- Consumption patterns have been changing, in association with modern distribution trends, and changing lifestyles. Consumption has been gradually transferring from traditional varieties like Golden and Starking, into newer ones like Gala, Fuji and Pink Lady.

- Spanish and EU authorities sponsor frequent marketing initiatives to boost fresh apple consumption. Apples are the third most popular fruit in Spain during the winter months, after oranges and bananas.

- Apple consumption data indicated in the PSD Table above for MY 2003/04, 2004/05 and 2005/06, relative to both fresh and processing, are FAS Office estimates. Apple withdrawal in MY 2003/04 and 2004/05 are official data provided by the Spanish intervention agency FEGA.

Trade

SPAIN: APPLE IMPORTS

Units: Metric Tons

MY:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	189,562	299,700	186,532	271,116	235,324	280,000	260,000
EU	159,270	262,335	138,218	217,692	163,675	200,000	185,000
Non-EU	30,292	37,365	48,314	53,424	71,649	80,000	75,000

SOURCE: Global Trade Atlas until MY 2003/04. FAS Office estimate for MY 2004/05 and MY 2005/06.

SPAIN: APPLE EXPORTS

Units: Metric Tons

MY:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
TOTAL	62,564	68,625	134,504	69,056	112,773	85,000	90,000
EU	48,592	53,852	107,960	51,794	82,117	65,000	68,000
Non-EU	13,972	14,773	26,544	17,262	30,656	20,000	22,000

SOURCE: Global Trade Atlas until MY 2003/04. FAS Office estimate for MY 2004/05 and MY 2005/06.

- We forecast MY 2005/06 Spanish apple imports to be down moderately, displaced by the larger domestic crop. The EU will continue to supply the bulk of the import market, favored by easy transportation and low shipping costs. Third-country suppliers will continue to be dominated by Southern Hemisphere producers, who have the capability to supply fresh fruit off-season.

- Spanish fresh apple exports will be up in MY 2005/06, due to the larger domestic supply. These exports will continue to be primarily destined into other EU countries.

Trade Matrices

Import Trade Matrix

Country	Spain		
Commodity	Apples, Fresh		
Time Period	July/June	Units:	Metric Tons
Imports for:	2003		**2004**
U.S.	18	U.S.	1,400
Others		Others	
France	88,942	France	100,000
Italy	25,182	Italy	40,000
Portugal	17,321	Portugal	20,000
Germany	16,810	Germany	20,000
Other EU	15,420	Other EU	20,000
Chile	36,641	Chile	33,000
Argentina	13,229	China	20,000
China	11,192	Argentina	18,000
S. Africa	4,624	Brazil	5,000
Brazil	3,336	New Zealand	2,000
Total for Others	232,697		278,000
Others not Listed	2,609		600
Grand Total	235,324		280,000

Export Trade Matrix

Country	Spain		
Commodity	Apples, Fresh		
Time Period	July/June	Units:	Metric Tons
Exports for:	2003		**2004**
U.S.	0	U.S.	0
Others		Others	
France	34,169	France	25,000
Portugal	22,837	Portugal	20,000
Italy	6,495	Italy	5,000
U.K.	4,627	Belgium	5,000
Belgium	4,618	U.K.	4,000
Other EU	9,371	Other EU	6,000
Algeria	12,077	Algeria	7,000
Melilla	8,748	Melilla	6,000
Morocco	3,251	Morocco	4,000
Russia	2,172	Mauritania	2,000
Total for Others	108,365		84,000
Others not Listed	4,408		1,000
Grand Total	112,773		85,000

Marketing

- The Spanish market has some opportunities for U.S. apples.

- Current consumption trends favor red varieties, followed by Gala, Fuji and Golden.

- U.S. high quality, crispy and well-colored apples have had an encouraging success here in recent years. Spanish fruit importers express particular interest in U.S. Red Delicious and Golden varieties.

- Importer and consumer awareness of the texture and flavor of U.S. apples is limited. Education of more fruit importers and distributors about the quality properties of this product would contribute to boost sales in this market.

- Opportunities to export into Spain concentrate in the period between November and March, before the Southern Hemisphere crop reaches Spain.

- During this period, price-competitiveness relative to other EU suppliers is crucial for success, as EU apples can be shipped into Spain at a cost advantage relative to U.S. ones. The current dollar rate against the Euro favors the competitiveness of U.S. exports. However, parity variations between currencies will affect the competitiveness of the U.S. supply.

- For additional information on the Spanish apples market, importer lists, distributors, etc., please contact our office:

Office of Agricultural Affairs
Email: Agiberia@usda.gov

Commodity Name: Fresh Pears

Production, Supply & Distribution Table

PSD Table						
Country	Spain					
Commodity	Pears, Fresh			(HA)(1000 TREES)(MT)		
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		07/2003		07/2004		07/2005
Area Planted	31,040	38,136	30,446	38,136	0	38,136
Area Harvested	29,000	38,136	29,000	38,136	0	38,136
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
Commercial Production	681,700	708,300	638,900	547,100	0	618,600
Non-Comm. Production	22,000	20,000	21,000	15,000	0	20,000
TOTAL Production	703,700	728,300	659,900	562,100	0	638,600
TOTAL Imports	34,688	34,620	40,000	55,000	0	40,000
TOTAL SUPPLY	738,388	762,920	699,900	617,100	0	678,600
Domestic Fresh Consump	532,229	564,181	511,900	464,147	0	500,000
Exports, Fresh Only	141,237	141,221	135,000	110,000	0	120,000
For Processing	44,922	45,394	35,000	34,611	0	50,000
Withdrawal From Market	20,000	12,124	18,000	8,342	0	8,600
TOTAL UTILIZATION	738,388	762,920	699,900	617,100	0	678,600

Spain: Pear Production by Key Variety Type (1999 = MY 1999/2000, etc.)

Units: Metric Tons

	1999	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**
Limonera	71,914	52,279	63,540	56616	66,000	50,000	57,000
Ercolini	88,553	71,108	66,794	77171	87,000	67,000	77,000
Blanquilla	245,730	230,759	183,143	165357	190,000	146,000	166,000
Other Varieties	338,997	314,952	359,980	331,529	385,300	299,100	338,600
Total	**745,194**	**669,098**	**673,457**	**630,673**	**728,300**	**562,100**	**638,600**

Source: MAPYA Agricultural Yearbooks until 2002. MAPYA Avances, June 2005, for total production in MY 2003, 2004 and 2005; FAS Office estimate for variety breakdown for same years.

Spain: Pear Production by Autonomous Community

Units: Metric Tons

Prod. By Region	1999	2000	2001	2002	2003	2004	2005	Var. (*)
Cataluña	377,646	340,733	318,295	274,701	349,900	285,500	281,500	-1.4
Aragón	154,429	152,069	164,906	152,171	159,400	93,300	148,100	58.7
La Rioja	35,427	36,875	45,108	46,050	46,600	40,000	n,a,	-
Extremadura	58,952	42,255	35,870	37,570	26,900	20,600	30,000	45.6
R. de Murcia	38,897	28,210	32,093	34,269	34,000	33,800	n,a,	-
Andalucia	23,529	21,363	20,973	20,757	20,600	18,700	n,a,	-
Navarra	5,887	6,705	6,892	17,287	19,000	17,500	n,a,	-
C. Valenciana	17,382	15,789	14,873	15,516	15,500	12,800	14,000	9.4
Galicia	14,681	13,342	15,763	13,826	37,900	23,300	n,a,	-
Other	18,364	11,757	18,684	18,526	18,500	16,600	165,000	-
TOTAL	**745,194**	**669,098**	**673,457**	**630,673**	**728,300**	**562,100**	**638,600**	**13.6**

Source: MAPYA. Note: Data for 1999 to 2003 is definite. Data for 2004 and 2005 is preliminary. (*) 2005 output variation relative to 2004 levels, in percentage.

- Spanish pear production was only mildly affected by the CY-2005 drought. Official sources estimate MY 2005/06 crop to come 2 percent under the previous five-year average;

- About 70 percent of production is concentrated in Northeastern Spain, in the Ebro river basin. Practically all the pear crop is produced under irrigation.

- About 47 percent of local pear trees are under 10 years old, and 14 percent are over 25 years old.

- For pear production outbreak by variety and region, please check tables above.

Consumption

- Fresh pear consumption will tend to recover in MY 2005/06 relative to poor MY 2004/05 levels, in association with the larger domestic supply;

- In general terms, fresh pear consumption is tending to decline, as it tends to be displaced by imported tropical fruits and new desserts.

- Most popular varieties are Blanquilla, Ercolini and Conference. Pears are consumed mainly during the fall and winter, competing with citrus, apples and bananas. Pears rank six in the list of most consumed fruit in Spain.

- MY 2003/04 and 2004/05 fresh pear use in processing indicated in PSD was provided by the Spanish Pear Contract Commission (COSEPOR). Total quantities withdrawn during the same years were provided by the Spanish intervention agency (FEGA). Pear consumption and withdrawal in MY 2005/06 are FAS Office estimates.

Trade

SPAIN: PEAR IMPORTS

Units: Metric Tons

MY:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	22,486	50,560	23,123	37,999	34,620	55,000	40,000
EU	16,430	43,861	14,932	27,521	20,438	39,000	28,000
Non-EU	6,056	6,699	8,191	10,478	14,182	16,000	12,000

SOURCE: Global Trade Atlas until MY 2003/04. FAS Office estimate for MY 2004/05 and MY 2005/06.

SPAIN: PEAR EXPORTS

Units: Metric Tons

MY:	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06
Total	131,843	104,604	197,841	120,427	141,221	110,000	120,000
EU	117,486	93,876	179,470	110,212	124,594	98,000	107,000
Non-EU	14,357	10,728	18,371	10,215	16,627	12,000	13,000

SOURCE: Global Trade Atlas until MY 2003/04. FAS Office estimate for MY 2004/05 and MY 2005/06.

- Spanish MY 2005/06 fresh pear imports will be down from previous year levels on account of the higher CY-2005 crop.
- Most of the imports will continue to come from other EU countries. However, a significant share of trade will be supplied from non-EU countries, led by Chile and Argentina.
- Spanish fresh pear exports will be up in MY 2005/06 as a consequence of the larger domestic pear supply.
- For pear total import and export series from MY 1999/00 to 2005/06, please check tables above. For detailed trade by origin/destination for MY 2003/04 and 2004/05, please check Trade Matrices below.

Trade Matrices

Import Trade Matrix

Country	Spain		
Commodity	Pears, Fresh		
Time Period	July/June	Units:	Metric Tons
Imports for:	2003		**2004**
U,S,	0	U,S,	0
Others		Others	
Belgium	9,556	Belgium	17,000
Netherlands	4,052	Netherlands	9,000
Italy	2,396	Portugal	6,000
France	2,686	France	4,000
Other EU	1,748	Other EU	3,000
Chile	6,845	Chile	8,000
Argentina	6,828	Argentina	7,000
China	223	China	400
Total for Others	34,334		54,400
Others not Listed	286		600
Grand Total	34,620		55,000

Export Trade Matrix

Country	Spain		
Commodity	Pears, Fresh		
Time Period	July/June	Units:	Metric Tons
Exports for:	2003		**2004**
U,S,	0	U,S,	0
Others		Others	
Italy	38,797	Italy	28,000
Germany	22,720	Greece	20,000
France	21,334	Germany	18,000
Greece	18,031	France	15,000
Portugal	8,492	Portugal	6,000
Netherlands	5,067	Belgium	3,000
Other EU	10,153	Other EU	8,000
Russia	10,268	Russia	6,000
Melilla	1,918	Melilla	2,000
Saudi Arabia	1,055	Brazil	1,300
Total for Others	137,835		107,300
Others not Listed	3,386		2,700
Grand Total	141,221		110,000

Marketing

- Market potential for U.S. pears in Spain is very limited.

- Spain is a net exporter of pears and the consumers have a strong preference for the domestic blanquilla variety. Competition from EU suppliers is very strong, due to low transportation costs compared to U.S. pear ones. South American countries replace EU suppliers during the EU off-season period.

Commodity Name: Table Grapes, Fresh

Production, Supply and Distribution Table

PSD Table						
Country	Spain					
Commodity	Grapes, Table, Fresh				(HA)(MT)	
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin	01/2004		01/2005		01/2006	
Area Planted	25,753	23,773	25,400	23,773	0	23,773
Area Harvested	24,500	22,711	24,000	22,711	0	22,711
Commercial Production	317,300	310,600	330,000	321,000	0	329,100
Non-Comm. Production	10,000	10,000	10,000	10,000	0	10,000
TOTAL Production	327,300	320,600	340,000	331,000	0	339,100
TOTAL Imports	30,000	24,122	20,000	30,000	0	25,000
TOTAL SUPPLY	357,300	344,722	360,000	361,000	0	364,100
Domestic Fresh Consump	209,300	236,393	205,000	225,976	0	224,070
Exports, Fresh Only	120,000	88,302	140,000	115,000	0	120,000
For Processing	20,000	20,000	10,000	20,000	0	20,000
Withdrawal From Market	8,000	27	5,000	24	0	30
TOTAL UTILIZATION	357,300	344,722	360,000	361,000	0	364,100

Spain: Table Grape Production by Region (Calendar Year)

Units: Metric Tons

Prod, By Region	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**(*)**
Comunidad Valenciana	217,793	179,267	188,700	188,585	181,200	167,200	187,200	12,0
R, de Murcia	95,242	98,420	88,513	93,291	96,800	125,000	115,000	-8,0
Andalucia	49,531	48,207	39,663	38,687	35,200	33,300	31,700	-4,8
Other	5,795	6,772	5,448	6,936	7,400	5,500	5,200	-5,5
TOTAL	**368,361**	**332,666**	**322,324**	**327,499**	**320,600**	**331,000**	**339,100**	2,4

Source: MAPYA. Note: Data for 1999 to 2003 is definite. Data for 2004 and 2005 is preliminary. (*) 2005 output variation relative to 2004 levels, in percentage.

- Spanish CY 2005 table grape production was 4 percent above the previous 5-year average. Absence of late Spring frosts favored flowering, while use of irrigation techniques on most vineyards protected the crop against the effects of the 2005 drought;

- Key table grape varieties are Muscatel, Ideal and Aledo.

- For table grape production breakout by region, please check table above.

Trade

SPAIN: TABLE GRAPE IMPORTS

Units: Metric Tons

Calendar Year:	2000	2001	2002	2003	2004	2005	2006
Total	16,801	27,794	22,732	25,359	24,122	30,000	35,000
EU	10,751	18,480	11,867	10,107	9,226	4,800	5,600
Non-EU	6,050	9,314	10,865	15,252	14,896	25,200	29,400

SOURCE: Global Trade Atlas until MY 2003/04. FAS Office estimate for MY 2004/05 and MY 2005/06.

SPAIN: TABLE GRAPE EXPORTS

Units: Metric Tons

Calendar Year:	2000	2001	2002	2003	2004	2005	2006
Total	106.169	97.996	115.258	124.713	88.302	115,000	120,000
EU	103.518	96.322	112.711	121.081	82.734	107,500	112,000
Non-EU	2.651	1.674	2.547	3.632	5.568	7,500	8,000

SOURCE: Global Trade Atlas until MY 2003/04. FAS Office estimate for MY 2004/05 and MY 2005/06.

Import Trade Matrix

Country	Spain		
Commodity	Grapes, Table, Fresh		
Time Period	Jan-Dec	Units:	Metric Tons
Imports for:	2004		**2005**
U,S,	0	U,S,	0
Others		Others	
Italy	5,478	Netherlands	1,500
Netherlands	1,485	Italy	1,400
Germany	980	Portugal	900
Other EU	1,283	Other EU	1,000
Chile	11,645	Chile	20,000
Argentina	1,233	Argentina	3,200
South Africa	1,106	South Africa	800
Morocco	633	Peru	800
Total for Others	23,843		29,570
Others not Listed	279		400
Grand Total	24,122		30,000

Export Trade Matrix

Country	Spain		
Commodity	Grapes, Table, Fresh		
Time Period	Jan-Dec	Units:	Metric Tons
Exports for:	2004		**2005**
U,S,	0	U,S,	0
Others		Others	
France	19,796	France	39,500
Germany	18,636	Portugal	29,000
U,K,	18,584	Italy	11,000
Portugal	12,791	Germany	7,000
Italy	3,959	Belgium	6,000
Netherlands	2,783	Netherlands	3,000
Other EU	6,185	Other EU	12,000
Russia	1,948	Russia	3,000
Panama	528	Croatia	2,000
Honduras	521	Morocco	1,500
Total for Others	85,731		114,000
Others not Listed	2,571		1,000
Grand Total	88,302		115,000

Marketing

- Spain is a very difficult market for U.S. grapes, as it is a major exporter and its production season overlaps with the U.S. one.

- Most popular grapes are of the Muscatel variety. Seedless grapes and grapes with a low percentage of sugar are becoming increasingly popular.

Commodity Name: Concentrated Apple Juice, C.A.J.

Production, Supply & Distribution Table

PSD Table						
Country	Spain					
Commodity	Apple Juice, Concentrated				(MT)	
	2003	Revised	2004	Estimate	2005	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin:	07/2003		07/2004		07/2005	
Deliv, To Processors	159,153	182,475	85,000	150,478	0	175,000
Beginning Stocks	5,406	5,406	4,834	4,676	0	4,676
Production	26,428	30,000	12,200	20,000	0	25,000
Imports	9,500	8,622	10,000	12,000	0	10,000
TOTAL SUPPLY	41,334	44,028	27,034	36,676	0	39,676
Exports	29,000	28,352	15,000	20,000	0	23,000
Domestic Consumption	7,500	11,000	7,500	12,000	0	13,000
Ending Stocks	4,834	4,676	4,534	4,676	0	3,676
TOTAL DISTRIBUTION	41,334	44,028	27,034	36,676	0	39,676

Production

- Spanish C.A.J. production will tend to be up in MY 2005/06, due to the larger apple crop relative to MY 2004/05;

- All C.A.J. production data reported in the PSD Table is FAS Office estimated.

Consumption

- We expect Spanish C.A.J. consumption to continue to expand in MY 2005/06, due to an increasing popularity of fruit juices.

Trade

- Data in Trade Matrices below is reported on a 70 Brix basis.

Import Trade Matrix

Country	Spain		
Commodity	Apple Juice, Concentrated		
Time Period	July/June	Units:	Metric Tons
Imports for:	2003		**2004**
U,S,	0	U,S,	0
Others		Others	
Germany	2,020	Austria	2,400
Austria	785	Germany	1,600
France	663	France	1,300
Italy	373	Netherlands	700
Netherlands	372	Italy	400
Other EU	175	Other EU	1,230
China	3,055	China	2,000
South Africa	920	S, Africa	800
		Turkey	600
		Israel	500
Total for Others	8,363		11,530
Others not Listed	259		470
Grand Total	8,622		12,000

Export Trade Matrix

Country	Spain		
Commodity	Apple Juice, Concentrated		
Time Period	July/June	Units:	Metric Tons
Exports for:	2003		**2004**
U,S,	50	U,S,	250
Others		Others	
Germany	12,681	U,K,	5,500
U,K,	4,340	France	3,300
Netherlands	2,728	Portugal	2,100
France	2,585	Netherlands	1,200
Portugal	1,613	Germany	800
Austria	728	Italy	600
Other EU	1,134	Other EU	1,982
Japan	536	Ghana	1,100
Ghana	299	Japan	700
Morocco	297	Taiwan	600
Total for Others	26,941		17,882
Others not Listed	1,361		1,868
Grand Total	28,352		20,000