



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Scheduled Report - public distribution

Date: 9/9/1999

GAIN Report SP9053

## Spain

### Fresh Deciduous Fruit

### Trends in Spain's Deciduous Fruit Sector

**1999**

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#### **Report Highlights:**

**Production of apples, pears and table grapes is expected to be higher than during the previous season. Imports during the previous year increased due to the shorter crop. Imports during marketing year 1999/2000 are expected to decrease, while are forecast to be higher. U.S. apples imports during CY 1998 went up to 815 tons, compared to only 47 tons in 1997.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Madrid [SP1], SP

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## **Executive Summary**

Favorable weather conditions allowed normal development of the apple crop during the blooming period, but hail at the beginning of May and early August in some areas of Catalonia slightly reduced expectations for the crop. Nonetheless, total apple production for 1999/00 is forecast at 818,900 tons, about 17 percent higher than last year's crop. The 1999/00 pear crop, also effected by the same weather conditions, is estimated at 575,300 tons, slightly above the previous year. Despite dry conditions that have prevailed throughout production areas, the 1999/00 table grape crop is forecast to reach about 375,000 metric tons, which would be about 7 above the previous year. Due to the higher crop expectations, 1999/00 deciduous fruit imports are forecast to decrease, while exports are expected to be slightly higher. U.S. apple exports to Spain increased dramatically in 1998 to 815 metric tons from 57 tons in 1997, despite stiff competition from other suppliers. Opportunities continue to exist for U.S. apples in Spain, particularly red delicious and golden varieties; however, the continued strength of the dollar is hampering U.S. competitiveness. As Spain is a net pear and table grape exporter, it is not a large market for U.S. pears and table grapes.

Note: Current exchange rate is:

159 pesetas/\$1.00.

1 ECU = 166.38 Pesetas

1 ECU = \$1.04

## **Production**

### **A. Fresh Apples**

Favorable weather conditions contributed to the regular development during the early blooming period. However, this was followed by freezes in some apple producing areas during spring and hailstorms during mid-spring and early summer. Total 1998/99 apple crop is estimated at 818,900 metric tons, about a 16 percent above last year's crop. Of the total, table apples is estimated at 763,100 tons (about 12 percent higher than the previous year), while apple cider production is forecast to reach 55,800 tons (about 62 percent above the previous year). The quality of the fruit that can be commercialized for fresh consumption is reportedly good. Nevertheless, these estimates might change slightly due to recent heavy rains in some areas of Catalonia and Aragon in early September and whose impact has not yet been fully quantified. Also, at the end of the first week in September, hailstorms were reported in Aragon. Most of the apple had harvest started at the beginning of September.

About 60 percent of the apple crop is produced in Catalonia and in the Ebro river basin. Lerida, the main producing province, accounts for approximately 30 percent of national production. Total area planted to dessert apples (1997 data) is 44,500 hectares, of which 43,400 ha. are bearing. Cider apple production is concentrated in Asturias and the Basque Country, Northern Spain. Area planted to cider apples is 7,700 hectares. Area of both crops has been declining slightly. Golden (52.2%), Red Delicious and Starking (10.1%) and Gala (5.6%) are the most produced and demanded apple varieties in Spain. Area planted to bi-colored varieties like Gala and Fuji has been increasing, while area to Golden and red varieties is decreasing. About 51 percent of apple trees planted in Spain are 10 years old, while only 10 percent were planted 25 years ago. About 76 percent of the apple crop is produced under irrigation.

### **B. Fresh Pears**

Weather conditions were good during the early blooming period, but freezes in some pear producing areas during spring and hailstorms during mid spring and early summer hampered development of the 1999/2000 pear crop. Current marketing year pear crop is estimated at 575,330 metric tons. Fruit quality is good.

About 70 percent of the pear crop is produced in Northeastern Spain and in the Ebro river basin. Lerida, the main producing province, accounts for approximately 43 percent of national production. Total area planted to pears (1997 data) is 39,000 hectares, of which 35,000 ha. are bearing. Blanquilla, Conference, Ercolini and Limonera (Jules Guyot) are the most produced and demanded pear varieties in Spain. Practically all of the pear crop (97.5 percent) is produced under irrigation.

About 47 percent of the pear trees are less than 10 years old, while only 14 percent are 25 years or over.

### **C. Fresh Table Grapes**

Despite freezing temperatures last spring that damaged early shoots, as well as extremely dry weather in eastern and southern Spain, the 1999/00 table grape crop is forecast to be about 7 percent higher than the previous year. About 60 percent of this crop is located in the Valencia region.

## Consumption

### A. Fresh Apples

While the recovery of the economy has increased overall fruit consumption, fresh apple consumption remains relatively stable. Fruit in Spain is considered a desert and must compete with the increased consumption of dairy products. Spanish and EU authorities continue organizing campaigns to increase apple consumption. EC Regulation No. 1099/99 lays down detailed rules for increasing consumption and utilization of apples and the consumption of citrus fruit. Apples are the third most consumed fruit in Spain, after oranges and bananas.

### B. Fresh Pears

Fresh pear consumption is basically stable, with year-to-year fluctuations reflecting domestic production levels and availability. The main varieties consumed in Spain are Blanquilla, Ercolini and Conference, with Blanquilla the favorite among consumers. Pears rank sixth among the most consumed fruits in Spain.

### C. Table Grapes

Consumption of table grapes is forecast to increase from the previous year due to the higher output. Moscatel variety is the most appreciated variety in Spain. Table grapes are the ninth most commercialized fruit in Spain.

## Trade

### A. Apples

Apple imports are estimated to have increased significantly during marketing year 1998/99, as a consequence of the reduced domestic production. During the first 10 months of marketing year 1998/99 (July-98/April-99), apple imports totaled 160,060 metric tons. Based on that pace, imports are estimated to have reached about 180,000 tons, about 47 percent higher than the previous year. France, Chile and Italy were the major suppliers. Apple imports during calendar year 1998 amounted to 149,058 metric tons, which was 26 above the previous year. With higher crop expectations for 1999/00, imports are forecast to decrease.

According to Spanish Customs data, in CY 1998, 815 tons of U.S. apple were imported, a dramatic increase from 57 tons a year earlier. It is hard to determine exactly the amount of U.S. apples marketed in Spain as they often pass customs in other EU countries and are then shipped to Spain. More imports of U.S. apples during calendar year 1998 are expected, although the continued strength of the dollar is handicapping U.S. exports. Nonetheless, Spain's fruit importers continue to express interest in importing U.S. apples, particularly Red Delicious and Golden varieties. Continued promotional efforts are required to increase Spanish importer and consumer awareness of the quality and of the many different varieties of apples that the U.S. can offer. The most important period to market U.S. apples in Spain is during the November-March period, before the Southern Hemisphere crop reaches Spain.

Exports during the first 10 months of 1998/99 marketing year amounted to 53,513 metric tons, about 26 percent higher than during the same period of the previous year's. Portugal and Germany were the main destinations. Exports during calendar year 1998 amounted to 58,823 metric tons, showing a slight increase from the previous year. Apple exports are forecast to be higher in 1999/00 due to the good expected domestic supplies.

## **B. Fresh Pears**

Imports of pears during the first 10 months of the marketing year 1998/99, amounted to 34,385 metric tons, about 98 percent higher than a year earlier. Imports during calendar year 1998 were 27,345 metric tons, about 10 percent higher from 1997. The bulk of imports continues to be sourced from other EU countries and Chile. No U.S. pear imports have been reported for calendar year 1998. Imports are expected to be reduced in 1999/00 as a result of higher domestic supplies.

Exports during the first 10 months of marketing year 1998/99 amounted to 85,401 metric tons, which was nearly half that of the previous year. Major destinations were Italy, Greece and Portugal. Total exports during calendar year 1998 were 100,004 metric tons, which was about a 60 percent decrease in comparison with previous calendar year. In 1999/00, however, exports are forecast to increase slightly due to the higher crop.

## **C. Table Grapes**

Imports of table grapes during the 1998 marketing year amounted to 19,920 metric tons, slightly higher than the previous year. Italy and Chile were again the major suppliers. As a result of higher production, imports are forecast to decline in 1999. Spain is a net grape exporter, and the harvest of the U.S. table grape crop coincides with the Spanish harvesting period for this product; thus, Spain has little potential as a U.S. table grape market.

Exports of table grapes during the 1998 marketing year were 92,712 metric tons, a slight decrease from the previous year. Major markets are other EU countries, mainly France, Germany and the United Kingdom. Exports are expected to be slightly higher in 1999 in line with forecast for higher domestic supplies.

# **Marketing**

## **A. Fresh Apples**

U.S. quality apples have good market opportunities in Spain, as long as they are crispy and well-colored.. Red U.S. varieties have the greatest marketing opportunities, followed by Golden. The main constraint to U.S. apple exports to Spain is high price relative to prices from other suppliers. Nevertheless, if a need emerges for Spain to turn to alternative suppliers, U.S. high quality apples will have a niche in the Spanish market. To tap into this potential U.S. suppliers will need to be more aggressive in promoting U.S. apples in Spain, stressing quality and fruit size. Spain's importers and consumers are already aware of the texture and flavor of the U.S. apples, but more fruit importers and distributors must be educated about this good quality product.

## B. Fresh Pears

Only in years of reduced crops is Spain a potential market for U.S. pears. EU suppliers are in a better position to supply winter pears due to lower transport costs from other EU countries. Spain also imports every year more pears from the Southern Hemisphere to provide the market with a continuous supply.

## C. Table Grapes

Spain is a difficult market for U.S. grapes since it is a major exporter of grapes and has a long growing season concurrent with the U.S. season.

### PSD Table - Fresh Apples

PSD Table	Fresh Apples		(HA) (1000 TREES) (MT)			
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Planted	49,400	49,400	49,000	49,000	0	49,000
Area Harvested	46,000	46,000	46,000	46,000	0	46,000
Bearing Trees	11,250	11,250	11,150	11,150	0	11,150
Non-Bearing Trees	250	250	250	250	0	250
Total Trees	11,500	11,500	11,400	11,400	0	11,400
Commercial Production	840,000	840,000	707,500	675,000	0	789,000
Non-Comm. Production	40,000	40,000	35,000	25,000	0	30,000
TOTAL Production	880,000	880,000	742,500	700,000	0	819,000
TOTAL Imports	122,000	122,000	112,500	180,000	0	140,000
TOTAL SUPPLY	1,002,000	1,002,000	855,000	880,000	0	959,000
Domestic Fresh Consump	670,000	670,000	670,000	665,000	0	670,000
Exports, Fresh Only	52,000	52,000	35,000	55,000	0	65,000
For Processing	180,000	180,000	140,000	150,000	0	160,000
Withdrawal From Market	100,000	100,000	10,000	10,000	0	64,000
TOTAL UTILIZATION	1,002,000	1,002,000	855,000	880,000	0	959,000

**Import Trade Matrix - Fresh Apples**

Import Trade Matrix			
Spain	Fresh Apples		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1997		1998
U.S.	57	U.S.	815
Others		Others	
France	58,913	France	81,183
Chile	19,601	Chile	24,384
Portugal	14,572	Italy	15,357
Italy	9,219	Portugal	7,954
Argentina	7,760	Argentina	5,572
New Zealand	4,176	Czech Rep.	3,418
Total for Others	114241		137868
Others not Listed	3,932		10,375
Grand Total	118230		149058



**Export Trade Matrix - Fresh Apples**

Export Trade Matrix		Spain	Fresh Apples
Time period	CY	Units:	Metric Tons
Exports for:		1997	1998
U.S.		U.S.	
Others		Others	
Portugal		22,054 Portugal	39,472
France		9,355 Germany	5,192
Germany		7,650 France	3,549
Netherlands		5,567 Italy	1,697
Belgium		4,818 Netherlands	1,588
Italy		2,095 United Kingdom	1,451
United Kingdom		2,095 Greece	1,335
Total for Others		53634	54284
Others not Listed		7,310	4,539
Grand Total		60944	58823

**PSD Table -Fresh Pears**

PSD Table	Spain	Fresh Pears	(HA) (1000 TREES) (MT)			
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		07/1997		07/1998		07/1999
Area Planted	39,200	39,200	39,000	39,000	0	39,000
Area Harvested	37,000	37,000	36,800	36,800	0	36,800
Bearing Trees	9,330	0	9,200	0	0	0
Non-Bearing Trees	520	0	550	0	0	0
Total Trees	9,850	0	9,750	0	0	0
Commercial Production	620,000	575,000	530,600	544,000	0	555,000
Non-Comm. Production	30,000	25,000	25,000	20,000	0	20,000
TOTAL Production	650,000	600,000	555,600	564,000	0	575,000
TOTAL Imports	23,000	22,000	30,000	38,000	0	30,000
TOTAL SUPPLY	673,000	622,000	585,600	602,000	0	605,000
Domestic Fresh Consump	440,000	400,000	440,600	440,000	0	445,000
Exports, Fresh Only	170,000	167,000	90,000	95,000	0	100,000
For Processing	34,000	26,000	35,000	35,000	0	35,000
Withdrawal From Market	29,000	29,000	20,000	32,000	0	25,000
TOTAL UTILIZATION	673,000	622,000	585,600	602,000	0	605,000

**Import Trade Matrix - Fresh Pears**

Import Trade Matrix		Spain	Fresh Pears
Time period	C. Y.	Units:	Metric Tons
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Portugal	5,812	Belgium	6,604
Netherlands	5,796	Netherlands	5,383
Chile	4,520	Chile	5,177
Belgium	3,789	France	2,208
Italy	1,747	South Africa	1,535
Argentina	1,160		
South Africa	1,131		
Total for Others	23955		20907
Others not Listed	704		6,447
Grand Total	24659		27354

**Export Trade Matrix - Fresh Pears**

Export Trade Matrix		Spain	Fresh Pears
Time period	C. Y.	Units:	Metric Tons
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Italy	54,978	Italy	19,303
Germany	23,117	Greece	16,944
Netherlands	20,877	Portugal	14,726
Greece	18,400	Germany	12,583
France	13,413	France	10,828
Belgium	7,851		
United Kingdom	4,735		
Portugal	3,886		
Israel	3,382		
Total for Others	150639		74384
Others not Listed	13,556		25,620
Grand Total	164195		100004



**PSD - Fresh Table Grapes**

PSD Table						
Country	Spain					
Commodity	Fresh Table Grapes					
	(HA)(MT)					
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Area Planted	32,500	32,500	32,000	32,000	0	32,000
Area Harvested	31,500	31,500	31,000	31,000	0	31,000
Commercial Production	305,800	305,100	340,000	340,500	0	360,000
Non-Comm. Production	5,000	5,000	10,000	10,000	0	15,000
TOTAL Production	310,800	310,100	350,000	350,500	0	375,000
TOTAL Imports	19,700	19,700	10,000	19,900	0	10,000
TOTAL SUPPLY	330,500	329,800	360,000	370,400	0	385,000
Domestic Fresh Consump	215,500	215,000	240,000	245,700	0	250,000
Exports, Fresh Only	100,000	100,300	95,000	92,700	0	100,000
For Processing	15,000	12,000	25,000	25,000	0	28,000
Withdrawal From Market	0	2,500	0	7,000	0	7,000
TOTAL UTILIZATION	330,500	329,800	360,000	370,400	0	385,000

**Import Trade Matrix - Fresh Table Grapes**

Import Trade Matrix		Fresh Table Grapes	
Time period	C. Y.	Units:	Metric Tons
Imports for:	1997		1998
Italy	13,327	Italy	12,201
Chile	2,731	Chile	2,808
France	1,567	South Africa	2,053
South Africa	1,226	France	1,595
Total for Others	18851		18657
Others not Listed	920		1,263
Grand Total	19771		19920

**Export Trade Matrix - Fresh Table Grapes**

Export Trade Matrix	Spain	Fresh Table Grapes	
Time period	C. Y.	Units:	Metric Tons
Exports for:	1997		1998
Germany	23,812	Portugal	28,209
France	23,511	Germany	20,705
Portugal	16,863	France	15,404
United Kingdom	13,327	United Kingdom	15,141
Netherlands	9,298	Netherlands	4,550
Italy	4,307	Italy	2,816
Switzerland	1,558		
Belgium	1,215		
Total for Others	93891		86825
Others not Listed	6,402		5,887
Grand Total	100293		92712

## Concentrated Apple Juice

### Production

As a result of a higher apple crop, 1999 concentrated apple juice (CAJ) production in Spain is forecast at around 18,500 metric tons. Data shown in the PS&D table are all expressed in terms of 70-71 brix concentrated juice.

### Consumption

Consumption is increasing slightly every year. Consumption of apple based beverages is an estimated 11,720 liters, representing only 0.3 percent of total beverages consumption in Spain.

### Trade

Concentrated apple juice exports during the first 10 months of marketing year 1998/99 (July-98/April-99) were 50 percent lower than the previous marketing year. Germany and France were the major destinations. Exports in 1999/00, however, are forecast to increase in line with higher output expectations. Total exports during 1998 were 14,813 metric tons.

CAJ imports during the first 10 months of marketing year 1998/99 were 9,350 metric tons. Most CAJ imports came from South Africa and Germany. Imports are forecast to decrease in 1999/00. Imports in 1998 were 6,765 metric tons.

### PSD - Concentrated Apple Juice

PSD Table	Spain Concentrated Apple Juice (MT)					
	Revised Old	1997 Preliminary New	1998 Preliminary Old	1998 Forecast New	1999 Forecast Old	1999 New
Market Year Begin		07/1997		07/1998		07/1999
Deliv. To Processors	180,000	180,000	140,000	150,000	0	160,000
Beginning Stocks	0	0	0	0	0	2,500
Production	19,000	20,800	15,600	17,500	0	18,500
Imports	6,000	6,300	6,000	10,000	0	8,000
TOTAL SUPPLY	25,000	27,100	21,600	27,500	0	29,000
Exports	19,500	19,800	15,900	13,000	0	15,500
Domestic Consumption	5,500	7,300	5,700	12,000	0	12,000
Ending Stocks	0	0	0	2,500	0	1,500
TOTAL DISTRIBUTION	25,000	27,100	21,600	27,500	0	29,000

**Import Trade Matrix - CAJ**

Time period	C.Y.	Units:	Metric Tons
Imports for:		1997	1998
South Africa		3,465 South Africa	2,505
Germany		1,895 Germany	2,013
Netherlands		282 France	626
		Netherlands	246
Others not Listed		425	1375
Grand Total		6067	6765

**Export Trade Matrix CAJ**

Time period	C.Y.	Units:	Metric Tons
Exports for:		1997	1998
U.S.		300 U.S.	54
Germany		11,893 Lybia	3,761
United Kingdom		2,679 France	2,172
France		2,182 United Kingdom	1,882
Japan		2,134 Japan	1,673
Portugal		1,004 Germany	1,433
Netherlands		1,000 Portugal	1,197
Others not Listed		2132	2,641
Grand Total		23324	14813