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Spain

Strawberries

Annual

2001

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Report Highlights:

2001 Spanish strawberry production decreased from 2000 due to bad weather during both the first and second crops. The harvest of the second crop was further impacted by a lack of labor. As a result, consumption and exports decreased while imports remained stable.

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

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EXECUTIVE SUMMARY

The Spanish Strawberry harvest season is divided into two crops. The first crop was planned to be on the market by the second week of January. However, the harvest was delayed due to a combination of bad weather (a heavy rainy winter and strong winds). The infrastructure was partially damaged and the Spanish growers were also dealing with the lack of strawberry pickers. The production was decreased and all these factors are reflected in a decrease of 50 percent in exports for the early crop. The unusually hot weather in early spring caused a different effect for the second crop. High volume production forced the Huelva farmers to destroy more than 10,000 tons of their product in order to avoid an oversupply on the market and due to low prices. More than ninety-five percent of the strawberries produced in Spain are grown in Huelva. Scattered planting is also located in Cadiz. The second crop also suffered because the lack of labor during the harvest.

Spain strawberry area decreased eight percent from 10,344 hectares (ha) in 2000 to 9,500 ha in 2001. The official data indicates that the strawberry production, at 304,000 metric tons (mt) in 2001, is down 15 percent from 2000 (357,000 mt). Harvested area covered 9,300 ha in 2001, down slightly from 9,500 ha in 2000.

The strawberry sector has started to research the development of its "own" strawberry variety. The medium term research goal is to avoid the payment of royalties to the United States. The Camarosa Californian is still the most popular variety in Spain.

Industry sources expect that the Spanish strawberry planted area will decrease even more over the next three years. However, the labor factor will play an important role in future planted areas.

FRESH STRAWBERRIES

PS & D Fresh Strawberries

PSD Table						
Country	Spain					
Commodity	Fresh Strawberries				(HA)(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Area Planted	10300	10300	9500	9500	0	9000
Area Harvested	9500	9500	9300	9300	0	8700
TOTAL Production	357000	357000	350000	304000	0	322000
Imports, Fresh	3000	3500	3000	3500	0	3000
TOTAL SUPPLY	360000	360500	353000	307500	0	325000
Exports, Fresh	220000	206000	215000	195000	0	200000
Domestic Fresh Market	75000	88000	75000	62500	0	70000
For Processing	65000	66500	63000	50000	0	55000
TOTAL UTILIZATION	360000	360500	353000	307500	0	325000

Production

Spanish strawberry production during the 2001 marketing year (Jan-Dec) decreased from 2000. The official data indicates that the strawberry production, at 304,000 mt in 2001, is down 15 percent from 2000 (357,000 mt). More than ninety-five percent of the strawberries produced in Spain are grown in Huelva. Scattered planting is also located in Cadiz. According to the industry sources, 20 percent of the total production has come from strawberries planted under "integrated production." This production is designed to obtain better quality product using more effectively the different elements from the agrosystem (water, plant, soil and weather) with the purpose of reducing the environmental impact and keeping the production profitable. This process regulates the use of pesticides.

Consumption

Fresh strawberry consumption for the year 2001 was 62,500 mt, a 29 percent decrease from 88,000 mt in 2000, because of the limited supply in early January and high prices.

Spanish consumer preference is oriented to the fresh strawberries and Spaniards like to eat strawberries with cream and use them to decorate cakes and tarts.

Trade

Spanish fresh strawberry exports were 205,866 mt, in 2000, a nine percent decrease from 1999. The exports reflected the strawberry production that was adversely affected by weather conditions. The main market for Spanish fresh strawberries continue to be Germany, France and the United Kingdom, as well other countries in the European Union.

Imports, virtually unchanged for 1999, basically took place during Spain's off-season period (October to December). Unfortunately, the market opportunities for the U.S. exporters in this sector are not favorable not only because Spain's production, but the berries' shelf life.

Spanish Imports Fresh Strawberries, 1999-2000

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Strawberries		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
France	1,865	France	2,027
Morocco	809	Morocco	1,161
Belgium	362	Belgium	156
Total for Others	3,036		3,344
Others not Listed	86		170
Grand Total	3,122		3,514

Spanish Exports Fresh Strawberries, 1999-2000

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Strawberries		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	95,897	Germany	78,133
France	59,139	France	58,885
United Kingdom	16,339	United Kingdom	17,039
Belgium	13,884	Italy	15,334
Italy	12,626	Belgium	12,600
Total for Others	197,885		181,991
Others not Listed	27,558		23,875
Grand Total	225,443		205,866

FROZEN STRAWBERRIES

PS & D Frozen Strawberries

PSD Table						
Country	Spain					
Commodity	Frozen Strawberries				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Deliv. To Processors	65000	66500	63000	50000	0	55000
Beginning Stocks	0	0	0	3500	0	500
Production	42200	42500	41500	32000	0	35200
Imports	4600	7800	5700	8000	0	7000
TOTAL SUPPLY	46800	50300	47200	43500	0	42700
Exports	27000	24000	30600	23000	0	24000
Domestic Consumption	19800	22800	16600	20000	0	18700
Ending Stocks	0	3500	0	500	0	0
TOTAL DISTRIBUTION	46800	50300	47200	43500	0	42700

Production

Spanish frozen strawberry production for marketing year 2001 (Jan-Dec) was 32,000 mt, down approximately 23 percent from year 2000.

Consumption

The majority of frozen berries are processed by the industry to make jams, yogurt and flavors.

Trade

Frozen strawberry exports in Spain declined by 23 percent, from 30,613 mt. in 1999 to 23,831 mt in 2000.

Frozen strawberry imports were up from 5,745 mt. in 1999 to 7,818 mt. in 2000, a 27 percent increase. The increase was due to the lower-volume production during the first crop. 92 percent of the imports in 2000 came from Morocco.

Spanish Imports Frozen Strawberries, 1999-2000

Import Trade Matrix			
Country	Spain		
Commodity	Frozen Strawberries		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Morocco	5,147	Morocco	7,257
France	245	Belgium	169
Belgium	143	United Kingdom	124
Italy	81	Belgium	48
Total for Others	5,616		7,598
Others not Listed	129		220
Grand Total	5,745		7,818

Spanish Exports Frozen Strawberries, 1999-2000

Export Trade Matrix			
Country	Spain		
Commodity	Frozen Strawberries		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
France	11,281	Netherlands	8,104
Netherlands	9,799	Germany	5,020
Germany	3,388	France	3,166
Italy	1,076	Italy	1,205
Total for Others	25,544		17,495
Others not Listed	5,069		6,336
Grand Total	30,613		23,831