



Foreign Agricultural Service

**GAIN Report**

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**Spain**

**Strawberries**

**Strawberry Annual - Revised**

**2000**

Approved by:

**Office of Agriculture Affairs**

**U.S. Embassy**

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**Report Highlights:**

**Due to unusually cool and dry weather in the early part of the growing season, output is forecast to fall in 2000. The lower production is expected to lead to lower exports as well. Consumption is growing, but in 2000 further growth will be hindered by lower domestic supplies. Imports are minimal, and U.S. strawberry exporters have little if any opportunities in this sector.**

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

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## **Executive Summary**

### **Production**

Strawberry area has stabilized and no increase is expected for 2000. After reaching a record 370,000 tons in 1999, production is forecast to decline to 345,000 tons in 2000. Production continues to be heavily geographically concentrated, with nearly 90 percent of output produced in Huelva, Andalucia. The region's growing conditions were less than optimal in early 2000, with cool temperatures in February leading to a slight delay in fruit development. This, combined with an almost total absence of precipitation for several months, is leading to expectations for lower output. The late development of the crop caused a glut in the market during the final days of February and early March, which resulted in producer prices dropping from 350 pesetas per kilogram to 250 pesetas per kilogram. Fruit collection generally begins in early February and lasts until late June, with April to May being the period of heaviest production. The Camarosa variety, developed in California, continues to be the most heavily use strawberry variety.

While the dry weather in southern Spain will not severely impact the 2000 crop, continued lack of rains may negatively impact next year's output. Spain's strawberry sector is irrigated, and declining reservoir levels are beginning to be a concern among producers and government officials. Other concerns include the threat of imports from growing production in North Africa, particularly Morocco. Producers claim that because production costs are lower there, import protection is required. Finally, lack of available labor at harvest time continues to be a problem that the sector must strive to overcome every year.

### **Consumption**

Due to greater consistency in quality, increased product familiarity, and growing disposable incomes, consumption of strawberries is growing in Spain. While lower domestic availability is expected to limit growth in 2000, fresh strawberry consumption was up about 25 percent in 1999. The fresh domestic and export markets continue to be the focus of the industry, with quantities sold to processing generally reflecting residual supplies. Due to shorter crop expectations, use by the processing industry is forecast to decline in 2000.

### **Trade**

With lower exportable supplies expected in 2000, fresh strawberry exports are forecast to fall. Boosted by the record output, In 1999, exports grew about 6 percent. Other EU countries continue to be the primary destination, with Germany the leading destination, followed by France and the U.K. While the sector has attempted to diversify export markets, the EU will continue to be the primary destination for Spain's strawberries.

Imports continue to be minimal, mainly used by processors during Spain's non-producing season. Little if any opportunities exist for U.S. exporters in this sector.

Note: Current exchange rate is approximately 166 pesetas/\$1.00.

**PS&D Fresh Strawberries**

PSD Table						
Country	Spain					
Commodity	Fresh Strawberries				(HA)(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	8300	8300	8500	9700	0	9700
Area Harvested	8100	8100	8300	9500	0	9500
TOTAL Production	317300	317300	340000	369700	0	345000
Imports, Fresh	2200	2305	700	2950	0	3000
TOTAL SUPPLY	319500	319605	340700	372650	0	348000
Exports, Fresh	221000	221000	250000	235350	0	220000
Domestic Fresh Market	55000	55105	50000	70300	0	70000
For Processing	43500	43500	40700	67000	0	58000
TOTAL UTILIZATION	319500	319605	340700	372650	0	348000

**PS&D Frozen Strawberries**

PSD Table						
Country	Spain					
Commodity	Frozen Strawberries				(MT)	
	Revised	1997	Preliminary	1998	Forecast	1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Deliv. To Processors	20000	32000	0	67000	0	58000
Beginning Stocks	0	0	0	0	0	0
Production	42400	30480	38000	44676	0	39000
Imports	4600	4693	3000	6018	0	5000
TOTAL SUPPLY	47000	35173	41000	50694	0	44000
Exports	27000	27173	30000	30694	0	27000
Domestic Consumption	20000	8000	11000	20000	0	17000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	47000	35173	41000	50694	0	44000

**Price Table**

Prices Table			
Country	Spain		
Commodity	Fresh Strawberries		
Prices in	pesetas	per uom	kilogram
Year	1998	1999	% Change
Jan			
Feb	350.17	252.85	-27.79%
Mar	189.39	260.23	37.40%
Apr	197.29	86.93	-55.94%
May	207.17	99.17	-52.13%
Jun	133.46	149.33	11.89%
Jul	296.24	232.41	-21.55%
Aug	305.86	222.08	-27.39%
Exchange Rate	168	Local currency/US \$	

**Fresh Strawberry Trade Matrices**

<b>Import Trade Matrix</b>			
Country	Spain		
Commodity	Fresh Strawberries		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	0	U.S.	
Others		Others	
EU Countries	1897	EU Countries	2058
Morocco	365	Morocco	828
Total for Others	2262		2886
Others not Listed	8		10
Grand Total	2270		2896

<b>Export Trade Matrix</b>			
Country	Spain		
Commodity	Fresh Strawberries		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.	0	U.S.	
Others		Others	
EU Countries	215800	EU Countries	221098
Switzerland	3500	Switzerland	3250
Czech. Rep.	455	Czech. Rep.	862
Croatia	265	Croatia	305
Bosnia	171	Polony	145
Andorra	31	Hungary	131
		Slovenia	69
		Andorra	29
Total for Others	220222		225889
Others not Listed	216		0
Grand Total	220438		225889

<b>Exports to EU 1999 (MT)</b>		
1	Germany	<b>95,994</b>
2	France	<b>59,320</b>
3	United Kingdom	<b>16,385</b>
4	Belgium	<b>13,896</b>
5	Italy	<b>12,652</b>
6	The Netherlands	<b>8,261</b>
7	Portugal	<b>7,576</b>
8	Austria	<b>5,273</b>

**Frozen Strawberry Trade Matrices**

<b>Import Trade Matrix</b>			
Country	Spain		
Commodity	Frozen Strawberries		
Time period	CY	Units:	Metric Tons
Imports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
EU Countries	884	EU Countries	750
Morocco	3551	Morocco	5175
Polony	215	Poland	41
Slovenia	20		
Total for Others	4670		5966
Others not Listed	23		52
Grand Total	4693		6018

<b>Export Trade Matrix</b>			
Country	Spain		
Commodity	Frozen Strawberries		
Time period	CY	Units:	Metric Tons
Exports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
EU Countries	25914	EU Countries	28758
Switzerland	449	Switzerland	550
Kuwait	288	Kuwait	575
S. Arabia	164	S. Arabia	358
Dominican R.	100	Qatar	125
Israel	96		
Qatar	80		
Total for Others	27091		30366
Others not Listed	82		328
Grand Total	27173		30694