Producer country file

The avocado in Spain

by Eric Imbert

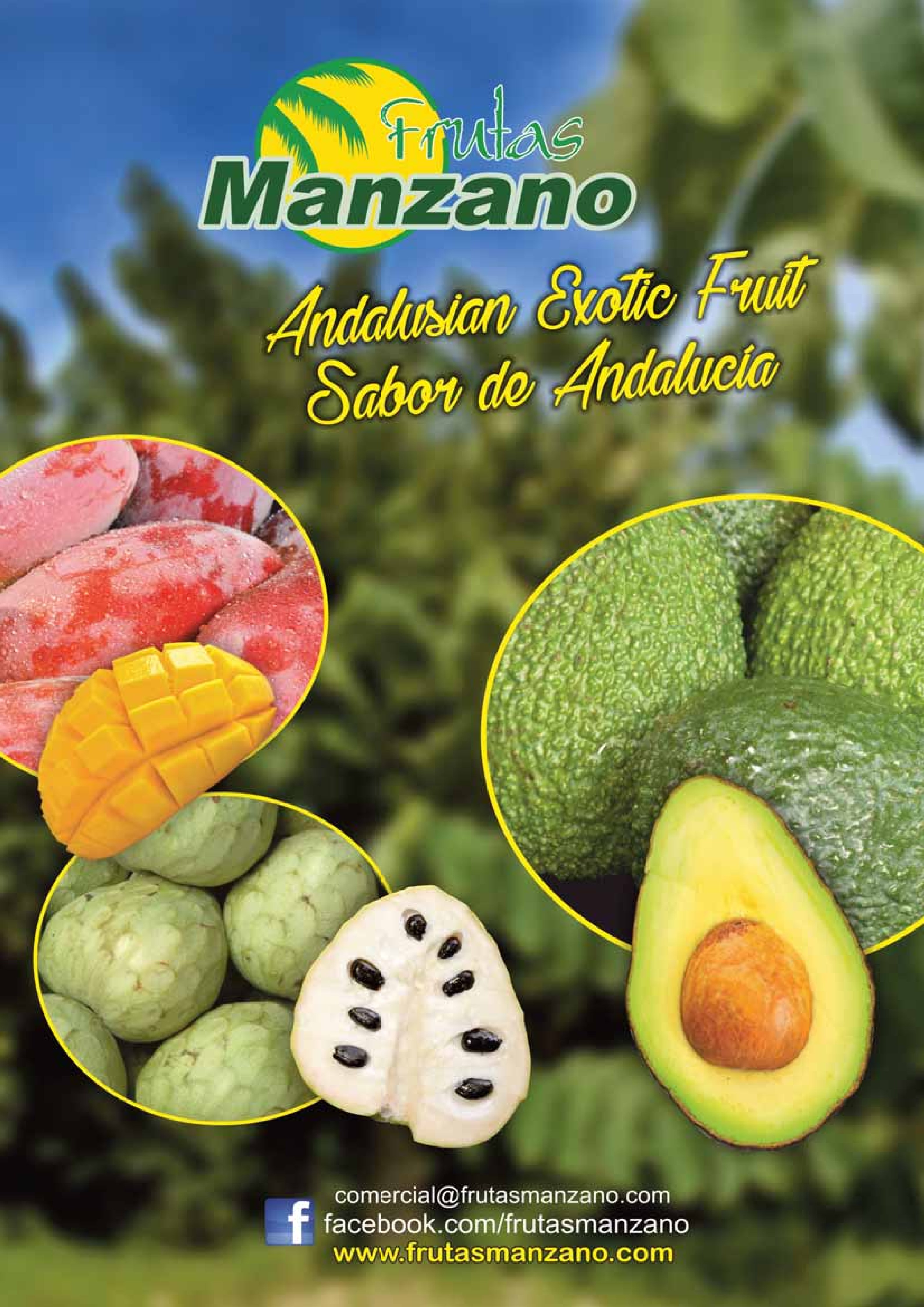
The Spanish avocado industry, dating back to the early 1970s, is among the world's leading exporters, with shipments of approximately 50 000 to 60 000 t per year. Spain is the only European Union country to produce significant volumes on the continent, thanks to the particular climate conditions of the Andalusian coast. This origin is one of the major players on the EC market, where it has concentrated its shipments in view of the comparative advantages it has in terms of logistics and customs. The development of the sector, limited in the traditional Malaga/ Granada zones due to lack of water and land reserves, is more significant in new production centres, where climate constraints are nonetheless heavier (Cadiz, Valencia and Huelva).

© Eric Imbert

Avocado – Spain

Location

More than 80 % of the Spanish cultivation area, which covers approximately 13 500 ha, is packed along the Andalusian coast. It extends mainly along a coastal strip approximately 80 km long and ten or so kilometres wide, ranging from west Málaga to Motril (Málaga and Granada provinces). This zone enjoys a microclimate with very mild winters, atypical on this latitude, due to the proximity of the sea to the south and to the presence of the lower foothills of the Sierra Nevada to the north, a natural barrier protecting it against the cold northern currents while holding back the warm air from Africa. Conversely, the rainfall is generally only 350 to 400 mm/year. The core of the cultivation area is situated in the middle of this zone, in Axarquía, a small sub-region situated around the city of Vélez-Málaga. The rest of export production comes from four fairly recently developed zones, still limited in scale. In the north, the Valencian Community has a cultivation area estimated at between 600 and 800 ha, scattered in coastal zones with hotter microclimates in the provinces of Valencia (Pego, Olivar, Gandia, Sagunto) and above all Alicante (Callosa d'en Sarriá). Temperatures are a limiting factor, in certain zones, especially in Valencia province, since they are mainly planted with Lamb Hass, more cold-tolerant. Surface areas in the south are apparently larger, with more considerable growth in the río Guadiaro valley (approximately 800 ha in Cadiz province, adjoining Málaga province). This zone, well provisioned with water, is nonetheless cooler and windier than the Málaga/Granada zone (frequent use of frost protection systems). Still further south, the cultivation area extends approximately 1 000 ha in the region situated between Huelva and the Portuguese border, where some large-scale projects are under development, at the initiative of private groups and a cooperative in particular. Finally, the Canaries cultivation area, on the strength of its approximately 1 600 ha mainly concentrated on Las Palmas, Tenerife and to a lesser degree Gran Canaria, is also progressing, though mainly with a view to supply the very keen local market, and to a lesser degree shipments to the Mainland.


Frutas
Manzano
Andalusian Exotic Fruit
Sabor de Andalucía
comercial@frutasmanzano.com
facebook.com/frutasmanzano
www.frutasmanzano.com

Avocado – Spain

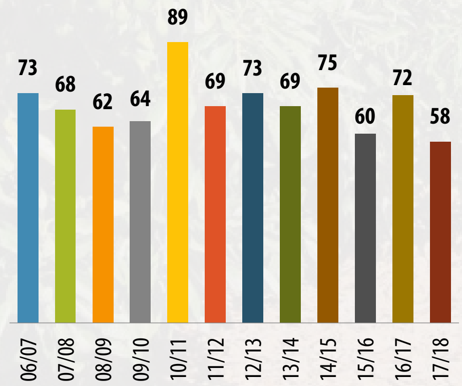
Production

The crop was introduced a long time ago to the Canaries (16th Century), but more recently to the peninsula, where the first industrial plantations were set up in the early 1970s. Surface areas, barely covering 1 000 ha by the end of the 1970s, boomed during the 1980s, due to the development of water supply infrastructures and the fall in profitability of open-air market gardening, hit by emerging competition from the Almería zone. They now extend over around 12 000 ha in the Peninsula's export zones. The average farm size varies greatly, with traditional small-sized facilities (less than 5 ha) still common in the Málaga/Granada region (approximately 40 % of surface areas) and in the Valencian Community. Yields are highly dependent on the technical level of the farms and the age of the stock (a wide range of 6 to 14 t/ha for Hass, with an average of around 7 to 8 t/ha). For the same reasons, the share of production comprising small fruits is rather big (average size of Hass generally between 18 and 22 inclusive). Sanitary problems are limited (root fungal diseases such as Phytophthora and Rosellinia necatrix, mites such as Oligonychus perseae and fungi such as Fusicoccum), and generally controlled via resistant rootstocks and integrated pest control.

Spanish production has stagnated between 65 000 and 75 000 t over recent campaigns, despite the good profitability of the crop and a renowned quality level (ultra-fresh fruits due to the immediate proximity of the big European markets). It should only progress in modest proportions in the short term, in the main cultivation centre of Málaga/Granada, where surface areas are expanding at around 150 ha per year. Land pressure is high, in particular in the highly touristy zone in the west of Málaga, whereas the coast of Granada is very rough and difficult to work. Yet above all, availability of agricultural water, from bore holes in the aquifers and rainwater impoundage (Viñuela dam, the main supply source for the area), is a limiting factor. The surface areas of this zone could double in the medium term, if the project aimed at diverting some of the water currently lost from the River Guadiaro toward Axarquía comes to pass. The project is remains in limbo for political reasons, despite the efforts of professionals and the big positive economic and social impacts it would have. In this context, it is above all the new production centres which should drive the dynamic over the coming years. While the minimum temperatures and wind are often limiting in these zones, the constraints are less pronounced in terms of both water resources and land resources, thanks to conversion from other less profitable crops such as citruses. Growth is reportedly around 150 ha per year in the Valencian Community, and 200 to 300 ha per year in the Huelva and Cadiz zone.

© Carolina Dawson

Avocado - Andalusia (Malaga, Granada, Cadiz, Huelva) - Production
(in 000 tonnes / source: MARM)




Share our passion...
THE AVOCADO
montosa
the avocado society
www.frutasmontosa.com

Avocado – Spain

Production calendar and varieties

The Hass variety makes up approximately 85 % of production, and is on an upward trend. The main smooth varieties are Fuerte and Bacon, the latter also acting as a pollinator and windbreak. The range is rounded off by some Lamb Hass plantations (especially in the cooler region of the Valencian Community), with Reed and Maluma planted recently.

Avocado - Spain - Production calendar

<table>
<tr><th colspan="2">S</th><th colspan="2">O</th><th colspan="2">N</th><th colspan="2">D</th><th colspan="2">J</th><th colspan="2">F</th><th colspan="2">M</th><th colspan="2">A</th><th colspan="2">M</th><th colspan="2">J</th><th colspan="2">J</th><th colspan="2">A</th></tr>
<tr><td></td><td colspan="7">Bacon</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td colspan="12">Fuerte</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td colspan="14">Hass</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td colspan="6">Reed</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td colspan="11">Pinkerton</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

Eric Imbert

© Guy Bréhinier

Outlets

Shipments to the other EU countries are prioritised, given the logistical advantages enjoyed by Spain. However, the local market, paradoxically practically non-existent in the early 1990s, is constantly progressing. Nonetheless consumption remains among the lowest of the producer countries (approximately 1 kg/capita/year), but is on the rise. The processing sector has expanded in recent years, harnessing the large volumes of very small-sized fruits. It tends to focus on the pre-cooked product segment (two high-tech high-pressure guacamole production units at Montosa and AvoMix, a subsidiary of Reyes Gutierrez).

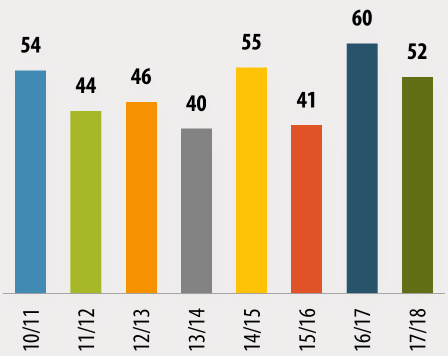
Avocado – Spain

Exports

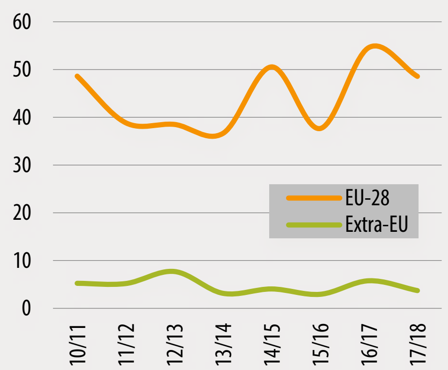
Exports exceeded 10 000 t over the course of the 1980s. They progressed rapidly between the beginning and end of the 1990s. Volumes have been between 40 000 and 60 000 t in recent campaigns. Spanish exporters are very much targeting the west of the EU, which receives 85 to 90 % of volumes. The geographic proximity enables them to serve all the Community markets with ultra-fresh merchandise, and provide a good quality service (ripening at source, no intermediaries). France remains the main market for the Spanish avocado, taking in more than 50 % of volumes. The UK has become Spain's number 2 customer in recent years, ahead of the Netherlands and Germany. Volumes shipped outside the EU are stable at around 9 000 t per year. The bulk of shipments are aimed at Morocco (entry level small fruits). Some volumes are also exported to distant markets (South Africa).

Spain has in recent years become Europe's second hub (imports more than 90 000 t, mainly from Peru, Mexico and Morocco). While there are around fifty export companies, the majority of volumes are concentrated in the hands of a limited number of large facilities operating both with local produce and imported avocados. The main players are Trops (only cooperative operating with tropical fruits in Europe), Frutas Montosa, Reyes Gutierrez and Grupo La Caña. There is no inter-professional association.

Avocado - Spain - Exports
net of re-exports
(*estimate / in 000 tonnes / source: Eurostat)



Avocado - Spain - Exports by destination
(in 000 tonnes / source: Eurostat)



Logistics

Logistics are exclusively by road, to serve the EU markets. The vast majority of volumes go via the distribution hubs at the Saint-Charles de Perpignan market, which is approximately 16 hours away. The United Kingdom and Scandinavia receive their shipments within 72 hours. Shipments to distant markets are by air-freight, via Malaga airport.