

CLOSE-UP: AVOCADO

Doha non-agreement & the banana dispute

European apple & pear harvest forecasts



Producer country sheet

Avocado in Spain

Avocado growing started in the early 1970s and developed rapidly. Spain is now one of the 15 leading producer countries with production of approximately 60 000 tonnes. Spain is the only EU country to produce significant quantities of avocado in continental Europe, thanks to the special climatic conditions on the Andalusian coast. This origin is one of the major players in the EU market, its main outlet, especially as some operators also trade in southern hemisphere avocado in a category management approach.

Production zones

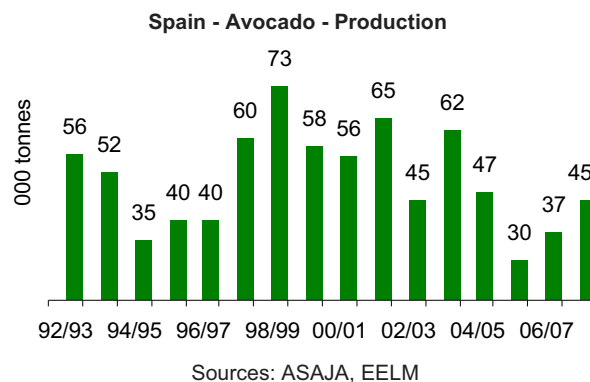


About 9 000 ha is planted with avocado, 90% of which is on the Andalusian coast between the sea and the foothills of the Sierra Nevada (Costa Tropical). This coastal strip some 80 km long and 10 km wide between the west of Málaga and Motril enjoys a special climate. Winters are mild and the small rainfall is compensated by the availability of fairly large quantities of good quality water impounded by dams in the Sierra Nevada. Sanitary problems consist mainly of fungal diseases of roots. A newly appeared spider mite causes some

local damage. Population and tourist pressure means that the areas west of Málaga are tending to stabilise or diminish. The orchards are mainly in the lower parts of the hills in the Axarquía region where new plantations compensate the decrease in the other zones. The total area under avocado is therefore tending to stabilise at 9 500 ha, especially as some growers favour mango as this requires less water, is easier to manage and has given good returns in recent years. A few pioneer orchards were planted in the Alicante area at the beginning of the decade and more recently in the hot areas in the south of the province of Valencia (Ribera). Most of the remaining plantations are at Las Palmas and Tenerife in the Canary Islands.

Volumes

The crop was introduced long ago in the Canaries (in the sixteenth century) but only recently in mainland Spain. The first large plantations were started in the early 1970s. The 1 000-hectare mark was reached only at the beginning of the 1980s, but the area then increased seven-fold in a decade (with the development of the water infrastructure and open field vegetable crops faced with competition from the emerging agriculture in the Almería area). Production has stabilised at between 55 000 and 65 000 t. It can dip more markedly during seasons in which the climatic conditions are particularly serious (drought, wind or frost) as was the case in 2005-2006 and 2006-2007. A mite introduced in 2004 has also caused serious yield loss in recent seasons. Nearly 80% of farms are of the traditional kind and cover less than 5 ha. These coexist with modern large-scale plantations.



Spain — Avocado — Harvest calendar											
S	O	N	D	J	F	M	A	M	J	J	A

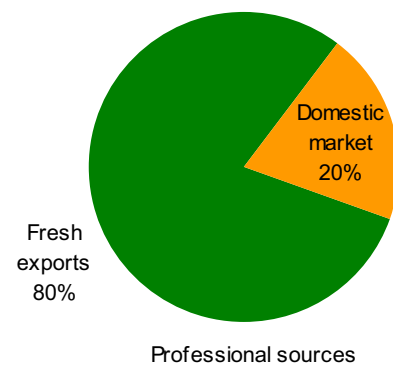
Production calendar and varieties

'Hass' forms more than three-quarters of production and is tending to increase. The main smooth varieties grown are 'Fuerte' and 'Bacon', the latter also serving as pollinator and wind-break. The range is completed by a few plantations of 'Reed'.

Outlets

Priority is awarded to shipments to the other EU countries, given Spain's logistic advantages. However, the domestic market—curiously almost nonexistent in the early 1980s—is growing. Consumption is some 550 g per person per year and is among the smallest observed in producer countries but it has been growing in recent years. Development should speed up in the years to come as there is a wave of immigration from large consumer countries in Latin America, Spanish consumers now know avocado better, etc. A generic advertising campaign for 'Hass' organised by Spanish and South American operators has been running since 2007-08. A few processing units exist (producing oil and pulp), including a large recent one.

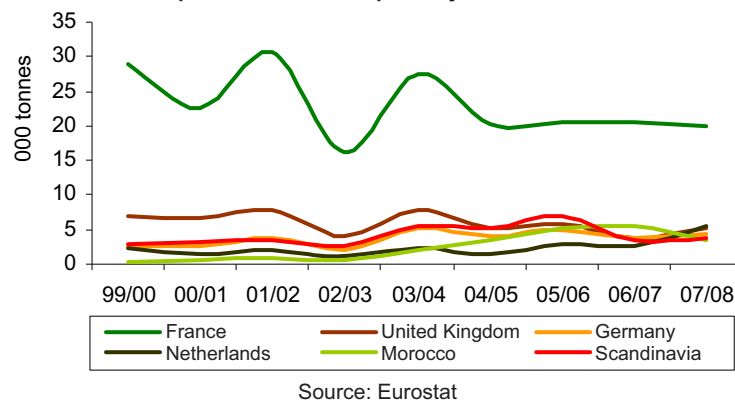
Spain - Avocado - Outlets



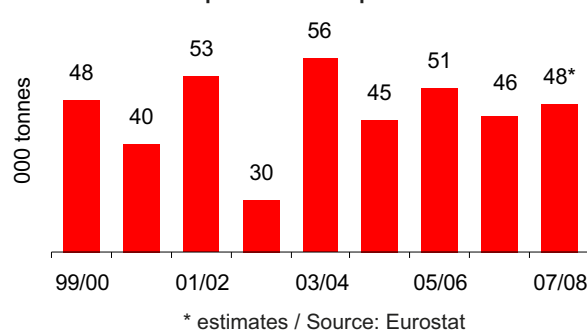
Total exports

Exports cleared the 10 000-tonne mark in the 1980s and increased strongly between the beginning and end of the 1990s. Alternate bearing was very marked at the beginning of the 2000s but volumes have been more regular in recent seasons, varying from 45 000 to 55 000 t. Some Spanish producers also trade in South American avocado in a category management approach (20 000 to 25 000 t of avocado imported mainly from Peru or Chile in recent years). The European Union is practically the only market targeted by Spanish exporters. Road transport is economical and fast, especially for consignments for France, the leading EU consumer country. Furthermore, Spain has the advantages of the common market, especially with regard to the customs status—in contrast with all its competitors. France is the main market for Spanish avocado but exporters are diversifying their outlets. The United Kingdom and Germany have become important markets since the mid-2000s. Increasing volumes are shipped to Scandinavia (Sweden and, more recently, Denmark) and also—outside the EU—to Morocco (budget price fruits). A few batches are also shipped to distant destinations. Most of the crop is marketed by a cooperative and a small number of traders, some of whom are also producers. There is no interprofessional body.

Spain - Avocado - Exports by destination



Spain - Avocado Exports and re-exports



Logistics

Transport is by road only for the supply of the EU markets. Most of the shipments travel via deconsolidation platforms at the Saint-Charles wholesale market in Perpignan to which deliveries take about 16 hours. The United Kingdom and Scandinavia are supplied within 72 hours. Shipments to distant markets are by air from Malaga airport.

