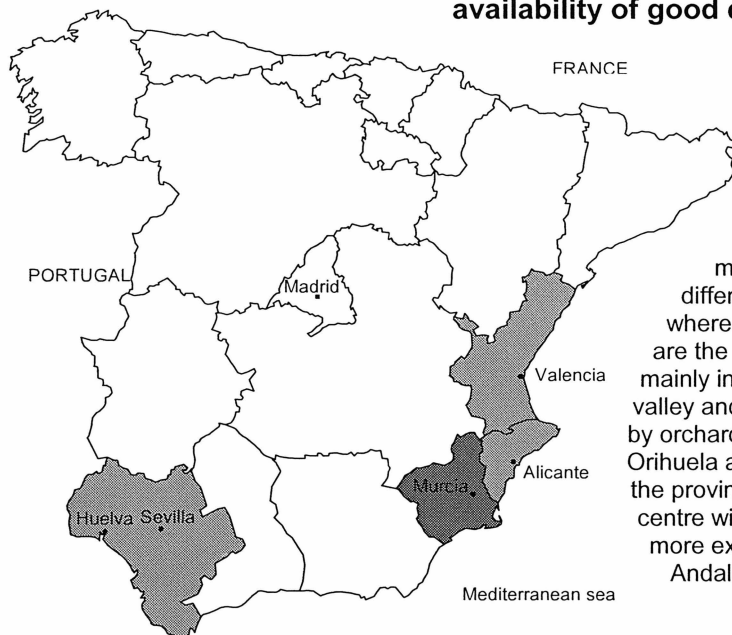


Spanish grapefruit

Spanish grapefruit production is comparatively modest at some 60 000 t according to professional sources. The sector has developed recently and is concentrated among a limited number of operators. It is focused mainly on the EU market, where it can benefit from commercial synergy with other citrus fruits. The planted area of the main export zone in the south of the province of Valencia and around Murcia is increasing but the availability of good quality water is a limiting factor.



Production zone

Grapefruit growing has developed recently in areas with a hot climate close to the coast and that are still available for growing orchard crops. Distinction can be made between two main centres whose farming systems differ markedly. The orchards along the east coast of Spain, where the climate is dry, clearly dominate national production and are the main suppliers of the fresh grapefruit market. They are mainly in southern Murcia (Campo de Cartagena, the Guadalentin valley and around Aguilas). Production in the 'Levante' is completed by orchards in the south of the province of Alicante (mainly around Orihuela and Albatera) and around Oliva and Gandia in the south of the province of Valencia. Andalusia is the other important production centre with plantations near Seville and Huelva. Production is much more extensive and the climate is more humid. A large proportion of Andalusian production is processed for juice.

Volumes

Unlike other citrus fruits, grapefruit is not a traditional crop in Spain. Developed from the early 1980s onwards with the introduction of red Texan varieties, the crop covers a limited area. Professionals estimate production to total some 60 000 t, a figure that seems more realistic than the official 30 000 t. The area under grapefruit now totals between 2 200 and 2 300 ha (according to professional sources once again) and is increasing with the new market opportunities in Europe (with the decrease in supplies from Florida) and difficulties in selling lemon, the leading crop in the area. However, the small water resources and, furthermore, the shortage of high quality water, is a limiting factor in the Murcia and Alicante area. However, the dry climate means that the region has advantages with regard to pest pressure, in contrast with Andalusia which is more humid. The sector is concentrated in the hands of about 25 large producers and some 10 exporters and is represented by the interprofessional organisation AILIMPO.



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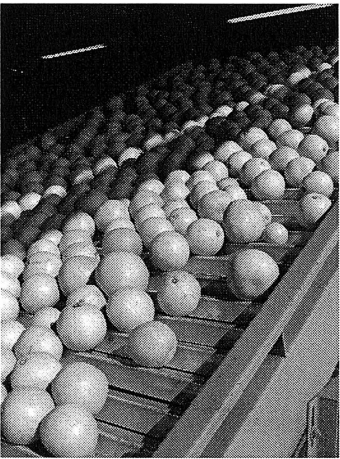
Spain — Grapefruit — Production calendar

	S	O	N	D	J	F	M	A	M	J	J	A
Rio Red												
Star Ruby												

to increase (double-grafted on 'Star Ruby', whose management becomes difficult after eight to ten years). The use of 'Rosé' ('Ruby Red') is slowing. 'White Marsh' is now grown on only very limited areas. The season starts with 'Star Ruby' during the first ten days of October and the first 'Rio Red' are available in mid-November. The season finishes at the end of May/beginning of June.

Production calendar

Most of the fruit produced consists of red varieties. 'Star Ruby' is dominant but 'Rio Red' is tending



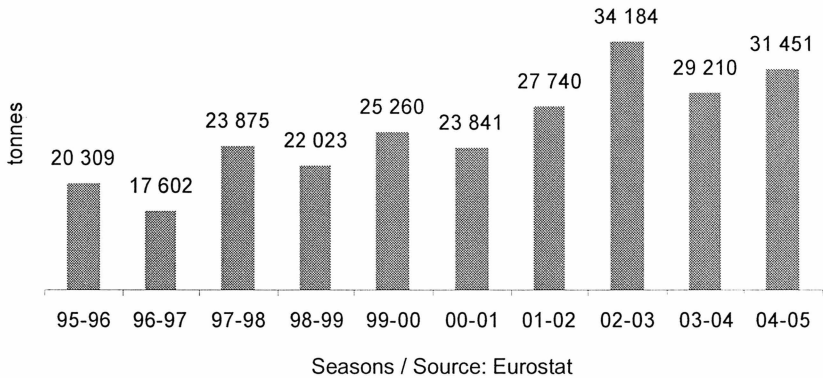
Outlets

Nearly 90% of production is sold as fresh fruits and most of the volumes are exported. However, the local market is taking increasing quantities that have now become significant, especially since the switch to coloured varieties was made about five years ago. The juice sector, supplied mainly by Andalusian growers, processes some 5 000 to 6 000 tonnes of fruits per year. It receives financial support from the EU.

Spain - Grapefruit - Outlets



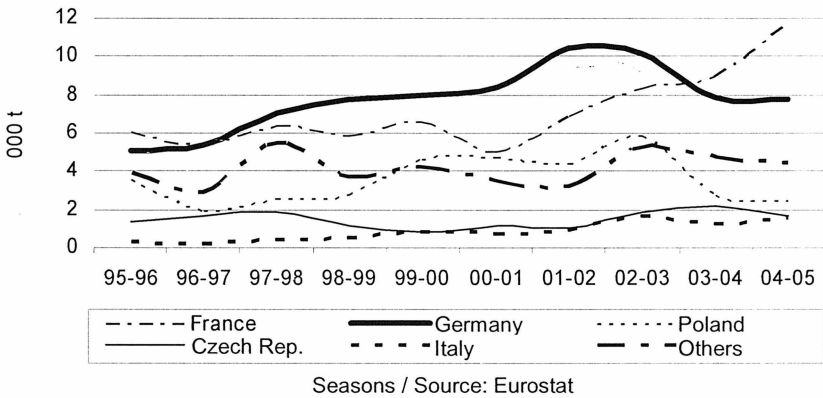
Spain - Grapefruit - Exports



Exports

Exports have remained very limited and consisted mainly of white grapefruit until the 1980s. Shipments started to develop gradually from then, on with the increase in the production of coloured fruits. Exports totalled some 20 000 t in the mid-1990s and reached 30 000 t in recent seasons (40 000 t according to professional sources). The customer portfolio is developing briskly, especially as a result of the decrease in shipments from Florida. France is now the leading destination at the expense of most of the other export markets, thanks in particular to the increasing number of supply schedules organised directly with supermarket chains. Germany has slipped to second position. The decrease is even sharper for the less profitable markets in eastern Europe (Czech Republic, Slovakia, Hungary and above all Poland). Shipments to Belgium are tending to increase. A few limited shipments leave for Portugal, the Netherlands and the United Kingdom.

Spain - Grapefruit - Exports by destination



Logistics

Road transport only is used for supplying the EU markets. Part of the volumes transit via the Saint Charles platform near Perpignan in France. However, most of the fruits are sent directly to the final client. Shipment to the United Kingdom takes about three days.

