



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 5/14/2008

GAIN Report Number: SP8007

Spain

Fresh Deciduous Fruit

2008

Semi-Annual

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Report Highlights:

The Government of Spain and Spanish processing pear producers decided and implemented complete subsidy decoupling beginning January, 1 2008, as part of an agricultural policy reform package initiated by the European Commission. The decision may eventually lead to decreasing Spanish processing-pear production as lower-cost producers compete favorably for market share in Europe and third-country markets.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Semi-Annual Report
Madrid [SP1]
[SP]

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Executive Summary

European Commission's (EC) Regulation 1182/2007 established the new economic support system for fruit and vegetable producers in European Union Member States (MS). The new regulation defines the rules for the decoupled support, and continued and augmented assistance to producer organizations (POs), including the use of Operational Funds (OF) by POs. It provides latitude for MS to decide certain aspects of its adaptation to the local political and production realities, giving producers and MS Governments an opportunity to "buy into" the reform process.

In response to EC/1182/2007, the reform of the Common Market Organization (CMO), Spanish processing pear producers and the Government of Spain (GOS) decided and implemented complete subsidy decoupling beginning January 1, 2008, moving immediately to a single farm payment (SFP) that will be based on the average producer payment received during a reference period determined to be 2003/04, 2005/06, and 2006/07. The SFP may be coming to producers at an opportune time, because they are coming off a weather-reduced harvest.

As part of the reform of the CMO, more EC and GOS funding will be made available for market development. The enhanced market development emphasis and funding, along with additional assistance via the Orchard Rejuvenation Program (ORP) (please see GAIN 6011 and GAIN 7034) may help Spanish producers improve their market position vis-à-vis European and third-country producers in the ever-changing European apple market.

Commodity name: Apples, Fresh

Production, Supply & Distribution Table

PSD Table

Country	Spain									UOM
	Apples, Fresh									
Commodity	2005			2006			(HA)(1000 TREES)(MT)			
	2005	Revised	Post	2006	Estimate	Post	2007	Forecast	Post	
Market Year Begin	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	MM/YYYY
		07/2005	7/1/2005		07/2006	7/1/2006		07/2007	7/1/2007	
Area Planted	39000	47000	39000	39000	47000	39000	39000	39000	39000	(HA)
Area Harvested	37800	45000	37800	37800	45000	37800	37800	37800	37800	(HA)
Bearing Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Commercial Production	712000	706900	712000	607800	657500	607800	610000	610000	614000	(MT)
Non-Comm. Production	62200	63000	62200	52900	58600	52900	55000	55000	53700	(MT)
Production	774200	769900	774200	660700	716100	660700	665000	665000	667700	(MT)
Imports	203258	219000	203258	209057	230000	208098	200000	200000	200000	(MT)
Total Supply	977458	988900	977458	869757	946100	868798	865000	865000	867700	(MT)
Fresh Dom. Consumption	658664	698171	658664	631947	698000	632162	635000	635000	634568	(MT)
Exports, Fresh	152890	130000	152890	113508	120000	112334	110000	110000	100000	(MT)
For Processing	154671	150000	154671	120800	122000	120800	118000	118000	132000	(MT)
Withdrawal From Market	11233	10729	11233	3502	6100	3502	2000	2000	1132	(MT)
Total Distribution	977458	988900	977458	869757	946100	868798	865000	865000	867700	(MT)

FAS/Madrid uses the following sources for all of the tables and graphs in this report, unless otherwise indicated:

Area Planted/Area Harvested: Spanish Ministry of Agriculture (MAPA) through 2005 and FAS/Madrid MY 2006 and 2007.

Fresh Fruit Production: MAPA through MY 2007.

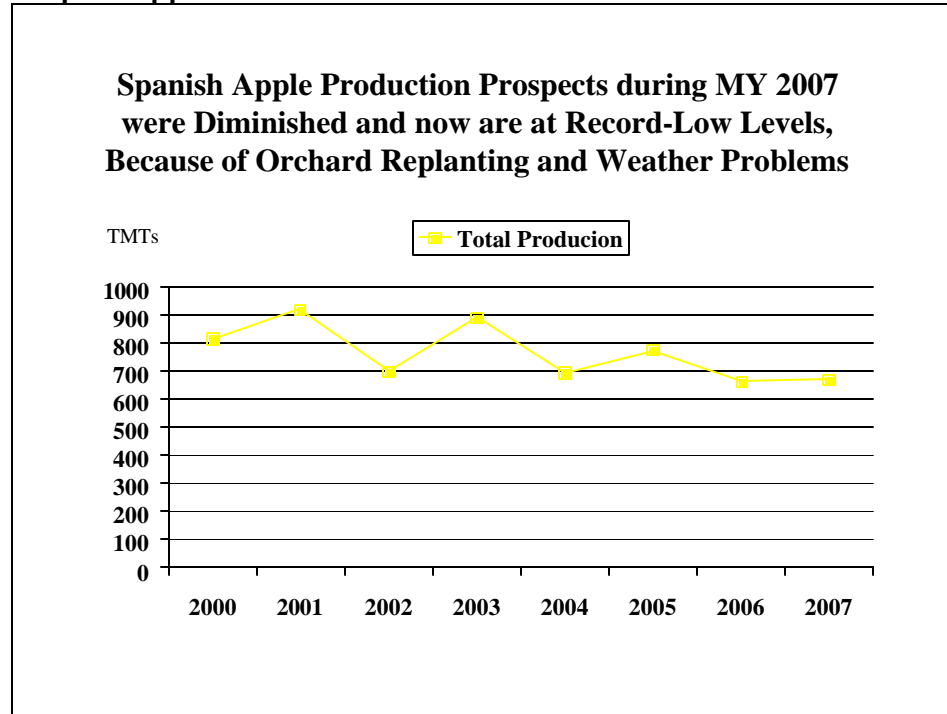
Import/Export: GTA through MY 2006 and FAS/Madrid MY 2007.

For Processing and Withdrawal: MAPA through MY 2005 and FAS/Madrid MY 2006 and 2007.

Apple Juice Production and Fresh Domestic Consumption: FAS/Madrid.

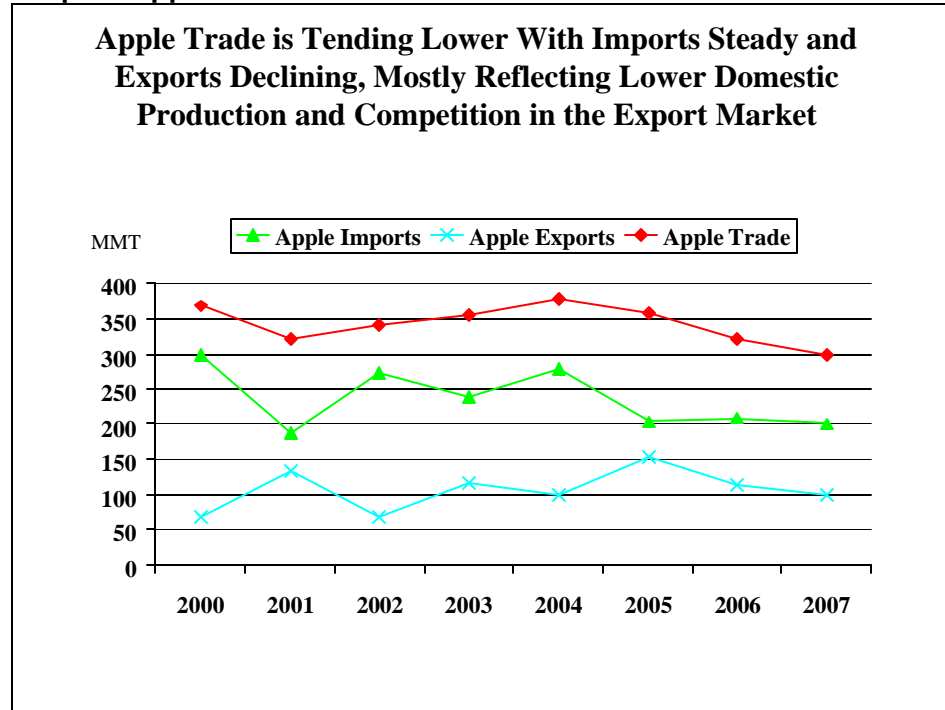
Production

Graph – Apple Production



Trade

Graph – Apple Trade



Trade Matrices

Import Trade Matrix**Country**

Spain

Commodity

Apples, Fresh

Time Period

July/June

Units:

Metric Tons

Imports for:

2006

2007

U.S.

U.S.

200

Others

Others

France	78,705	France	80,000
Italy	39,875	Italy	40,000
Chile	24,296	Chile	30,000
Germany	13,903	Germany	20,000
Argentina	12,592	Portugal	10,000
Portugal	10,347	China	10,000
China	8,751	Argentina	8,000

Total for Others

188,469

198,000

Others not Listed

19,457

1,800

Grand Total

208,098

200,000

Export Trade Matrix**Country**

Spain

Commodity

Apples, Fresh

Time Period

July/June

Units:

Metric Tons

Exports for:

2006

2007

U.S.

U.S.

0

Others

Others

France	35,261	France	36,000
Portugal	21,699	Portugal	20,000
Algeria	10,895	Algeria	12,000
Melilla	6,584	United Kingdom	8,000
Netherlands	6,057	Melilla	6,000
United Kingdom	5,491	Morocco	5,000
Russia	5,105	Russia	5,000
Germany	4,757	Germany	5,000

Total for Others

95,849

97,000

Others not Listed

16,485

3,000

Grand Total

112,334

100,000

Commodity name: Pears, Fresh

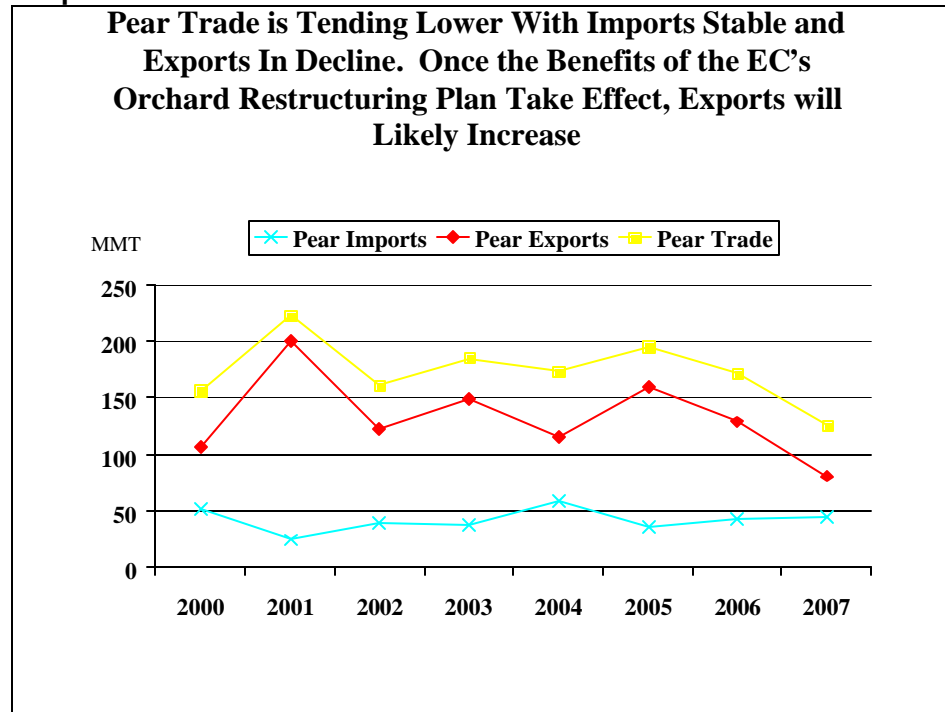
Production, Supply & Distribution Table

PSD Table

Country	Spain									UOM
	Pears, Fresh									
Commodity	2005			2006			(HA)(1000 TREES)(MT)			
	2005	Revised	Post	2006	Estimate	Post	2007	Forecast	Post	
Market Year Begin	USDA Official	Post Estimate	Estimate New	USDA Official	Post Estimate	Estimate New	USDA Official	Post Estimate	Estimate New	MM/YYYY
		07/2005	7/1/2005		07/2006	7/1/2006		07/2007	7/1/2007	
Area Planted	33500	38136	33500	33500	38136	33500	33500	33500	33500	(HA)
Area Harvested	31300	36699	31300	31300	36699	31300	31300	31300	31300	(HA)
Bearing Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Total Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Commercial Production	614800	626000	614800	566000	580400	566000	490800	490800	497000	(MT)
Non-Comm. Production	25000	26000	25000	24000	23700	24000	20000	20000	21100	(MT)
Production	639800	652000	639800	590000	604100	590000	510800	510800	518100	(MT)
Imports	36158	35000	36158	43172	40000	42843	39000	39000	45000	(MT)
Total Supply	675958	687000	675958	633172	644100	632843	549800	549800	563100	(MT)
Fresh Dom. Consumption	427362	459394	427362	455887	450000	446539	410800	410800	445387	(MT)
Exports, Fresh	159408	150000	159408	119670	127100	128689	100000	100000	80000	(MT)
For Processing	67582	56000	67582	50000	55000	50000	35000	35000	35000	(MT)
Withdrawal From Market	21606	21606	21606	7615	12000	7615	4000	4000	2713	(MT)
Total Distribution	675958	687000	675958	633172	644100	632843	549800	549800	563100	(MT)

Trade

Graph – Pear Trade



Trade Matrices

Import Trade Matrix**Country**

Spain

Commodity

Pears, Fresh

Time Period

Jul/June

Units:

Metric Tons

Imports for:

2006

2007

U.S.

U.S.

0

Others

Others

Belgium	16,396	Belgium	18,000
Netherlands	7,894	Netherland	8,000
Argentina	7,007	Argentina	7,000
Chile	4,935	Chile	5,000
France	1,736	France	3,000
Portugal	1,522	Portugal	2,000
Germany	1,353	Germany	1,000

Total for Others

40,843

44,000

Others not Listed

2,000

1,000

Grand Total

42,843

45,000

Export Trade Matrix**Country**

Spain

Commodity

Pears, Fresh

Time Period

Jul/June

Units:

Metric Tons

Exports for:

2006

2007

U.S.

U.S.

0

Others

Others

United Kingdom	35,049	United Kingdom	30,000
Germany	21,978	Germany	16,000
France	19,788	France	14,000
Portugal	18,104	Portugal	10,000
Netherlands	5,790	Netherlands	5,000
Italy	4,357	Italy	2,000
Poland	3,701	Poland	1,000

Total for Others

108,767

78,000

Others not Listed

19,922

2,000

Grand Total

128,689

80,000

Commodity name: Table Grapes, Fresh

Production, Supply & Distribution Table

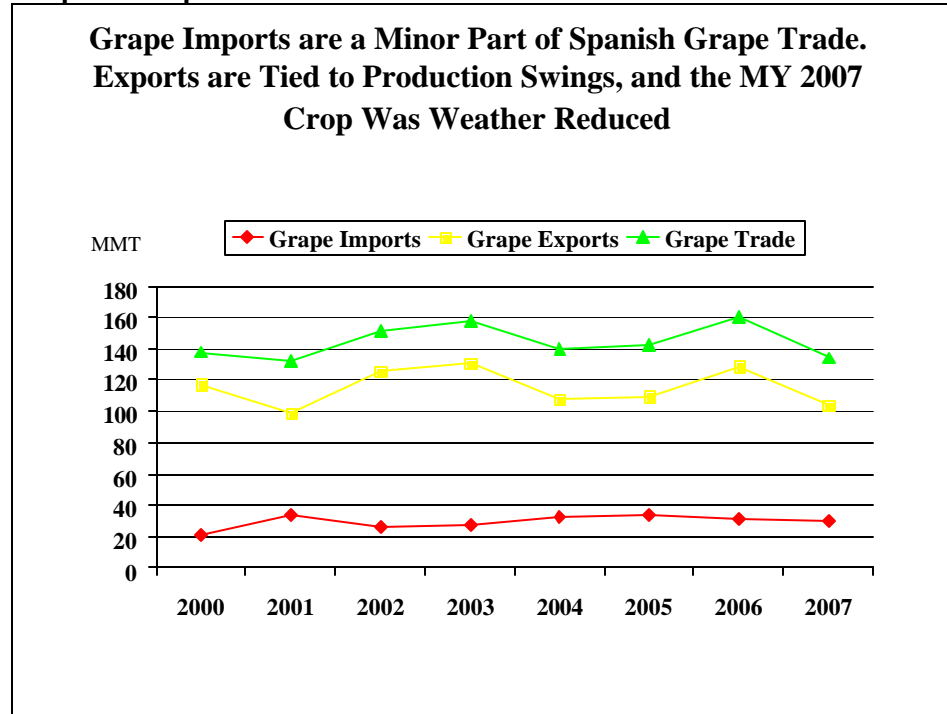
PSD Table

Country Commodity	Spain									UOM
	Grapes, Table, Fresh									
	2005			2006			2007			
	Revised	Post	Estimate	Estimate	Post	Estimate	Forecast	Post	Estimate	
Market Year Begin	Official	Post Estimate	Estimate New	Official	Post Estimate	Estimate New	Official	Post Estimate	Estimate New	MM/YYYY
Area Planted	21400	21400	21400	21400	21400	21400	23773	21400	21400	(HA)
Area Harvested	20700	20700	20700	20700	20700	20700	22711	20700	20700	(HA)
Commercial Production	302300	302300	302300	307600	307600	307600	295000	290000	300000	(MT)
Non-Comm. Production	10000	10000	10000	10000	10000	10000	10000	10000	10000	(MT)
Production	312300	312300	312300	317600	317600	317600	305000	300000	310000	(MT)
Imports	33408	33408	33408	31573	31573	31521	28000	30000	30000	(MT)
Total Supply	345708	345708	345708	349173	349173	349121	333000	330000	340000	(MT)
Fresh Dom. Consumption	226589	226589	226589	212518	209518	209466	208500	208800	220000	(MT)
Exports, Fresh	109588	109588	109588	128652	128652	128652	100000	105000	104000	(MT)
For Processing	9514	9514	9514	8000	11000	11000	24000	16000	16000	(MT)
Withdrawal From Market	17	17	17	3	3	3	500	200	0	(MT)
Total Distribution	345708	345708	345708	349173	349173	349121	333000	330000	340000	(MT)

Note: Fresh Fruit Production – MAPA through MY 2006, FAS/Madrid MY 2007.

Trade

Graph – Grape Trade



Trade Matrices

Import Trade Matrix**Country**

Spain

Commodity

Grapes, Table, Fresh

Time Period

July/June

Units:

Metric Tons

Imports for:

2006

2007

U.S.

U.S.

0

Others

Others

Chile	11,579	Chile	10,000
Italy	8,482	Italy	8,000
Netherlands	4,680	Netherland	6,000
S. Africa	2,097	Argentina	2,000
Argentina	1,100	S. Africa	1,000
Total for Others	27,938		27,000
Others not Listed	3,583		3,000
Grand Total	31,521		30,000

Export Trade Matrix**Country**

Spain

Commodity

Grapes, Table, Fresh

Time Period

July/June

Units:

Metric Tons

Exports for:

2006

2007

U.S.

U.S.

0

Others

Others

United Kingdom	35,049	United Kingdom	40,000
Germany	21,978	Germany	20,000
France	19,708	France	20,000
Portugal	18,126	Portugal	12,000
Netherlands	5,790	Netherlands	5,000
Italy	4,358	Italy	2,000
Poland	3,701	Poland	1,000
Total for Others	108,710		100000
Others not Listed	19,942		4000
Grand Total	128,652		104000

Commodity name: Concentrated Apple Juice, C.A.J.

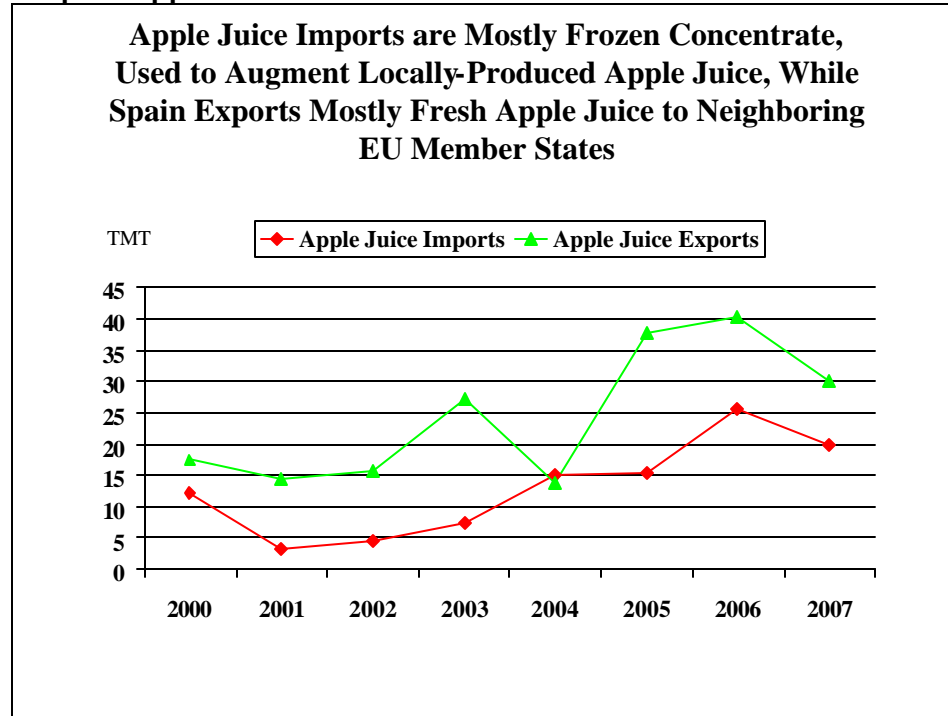
Production, Supply & Distribution Table

PSD Table

Country	Spain									UOM
	Commodity Apple Juice, Concentrated (MT)									
Commodity	2005			2006			2007			Forecast
	Revised	Post	Estimate	Estimate	Post	Estimate	Estimate	Post	Estimate	
Market Year Begin	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	
		07/2005	07/2005		07/2006	07/2006		07/2007	07/2007	MM/YYYY
Deliv. To Processors	154671	150000	154671	120800	122000	120800	118000	118000	132000	(MT)
Beginning Stocks	12370	12370	12370	4420	4420	4720	242	242	76	(MT)
Production	24129	24129	24129	19400	19400	19200	19000	19000	21000	(MT)
Imports	15479	15479	15479	25422	25422	25422	25000	25000	20000	(MT)
Total Supply	51978	51978	51978	49242	49242	49342	44242	44242	41076	(MT)
Exports	37758	37758	37758	40000	40000	40166	32500	32500	30000	(MT)
Domestic Consumption	9800	9800	9500	9000	9000	9100	8700	8700	9000	(MT)
Ending Stocks	4420	4420	4720	242	242	76	3042	3042	2076	(MT)
Total Distribution	51978	51978	51978	49242	49242	49342	44242	44242	41076	(MT)

Trade

Graph – Apple Juice Trade



Trade Matrices

Import Trade Matrix**Country**

Spain

Commodity

Apple Juice, Concentrated

Time Period

July/June

Units:

Metric Tons

Imports for:

2006

2007

U.S.

U.S.

0

Others

Others

China	12,172	China	9,000
Germany	4,870	Germany	4,000
Netherlands	4,033	Netherlands	3,000
Austria	1,676	Austria	1,000
Turkey	1,411	Turkey	1,000
Italy	614	Italy	1,000

Total for Others

24,776

19,000

Others not Listed

646

1,000

Grand Total

25,422

20,000

Export Trade Matrix**Country**

Spain

Commodity

Apple Juice, Concentrated

Time Period

July/June

Units:

Metric Tons

Exports for:

2006

2007

U.S.

U.S.

0

Others

Others

Ireland	11,320	France	10,000
France	10,117	Ireland	8,000
United Kingdom	9,834	United Kingdom	6,000
Netherlands	1,845	Netherlands	1,000
Germany	1,812	Portugal	1,000
Portugal	1,846	Germany	500

Total for Others

36,774

26,500

Others not Listed

3,392

3,500

Grand Total

40,166

30,000