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Spain

Fresh Deciduous Fruit

Semi-Annual

2007

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Report Highlights: Marketing year (MY) 2007 fresh deciduous fruit and concentrated apple juice exports will likely be off from recent years, and in particular from the previous two marketing years when Spain had excellent production conditions.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Scheduled Report
Madrid [SP1]
[SP]

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Executive Summary

Total Deciduous Fruit

MY	AHarvested	CProduction	NCProduction	Imports	Exports	DomConsum	ForProcessing	Withdrawl
2007	265,200	3,364,600	95,000	317,800	1,135,000	1,776,000	839,400	27,000
2006	265,537	3,508,300	94,000	306,135	1,240,374	1,757,761	882,500	27,800
2005	261,837	3,562,000	95,300	285,883	1,248,671	1,773,500	881,719	39,293

Apples

MY	AHarvested	CProduction	NCProduction	Imports	fExports	DomConsum	ForProcessing	Withdrawl
2007	45,000	600,000	60,000	230,000	100,000	675,000	113,000	2,000
2006	45,000	650,000	60,000	220,000	110,000	675,000	142,800	2,200
2005	45,000	709,900	60,000	196,758	150,879	680,000	132,779	3,000

Spanish MY 2007 deciduous fruit production will likely be lower than production during the previous two years, because of a very wet and cool spring. In a complete contrast to the previous two drought years, Spring 2007 weather has made for a very difficult start to the year.

As we note in the above tables, Spain is a net exporter of fresh deciduous fruit, with the exception of fresh apples. Approximately 75 percent of Spain's trade in fresh deciduous fruit is with European Union Member States. Imports of fresh pears and table grapes are mostly counter-seasonal, especially those from southern hemisphere producers in Africa and South America. Deciduous fruit exports outside the European Union are mainly to Mediterranean basin neighbors and to Russia.

On the trade and production policy fronts, Spanish producers remain concerned about Common Agriculture Policy reform, as we have detailed GAIN SP 6023 and SP 7003. In addition they are concerned with CE 85/2004, which proposes to set minimum marketing standards. The Spanish will be participating, along with other European producers, in an effort to assure that these standards are ultimately set in line with their interests.

Commodity Name: Fresh Apples

Production, Supply & Distribution Table

Commodity	Apples, Fresh						(HA)(1000 TREES)(MT)		
	2005	Revised		2006	Estimate		2007	Forecast	
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	7/1/2005		07/2006	7/1/2006		07/2007	7/1/2007	
Area Planted (HA)	47000	47000	47000	47000	47000	47000	0	0	47000
Area Harvested (HA)	45000	45000	45000	45000	45000	45000	0	0	45000
Bearing Trees	0	0	0	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0	0	0	0
Commercial Production	706900	706900	709900	657500	657500	650000	0	0	600000
Non-Comm. Production	63000	63000	60000	58600	58600	60000	0	0	60000
Production (MT)	769900	769900	769900	716100	716100	710000	0	0	660000
Imports (MT)	219000	219000	196758	230000	230000	220000	0	0	230000
Total Supply (MT)	988900	988900	966658	946100	946100	930000	0	0	890000
Fresh Dom. Consumption	698171	698171	680000	698000	698000	675000	0	0	675000
Exports, Fresh (MT)	130000	130000	150879	120000	120000	110000	0	0	100000
For Processing (MT)	150000	150000	132779	122000	122000	142800	0	0	113000
Withdrawal From Market	10729	10729	3000	6100	6100	2200	0	0	2000
Total Distribution (MT)	988900	988900	966658	946100	946100	930000	0	0	890000

SOURCE: Production – MAPA data through 2006. FAS Madrid forecast for 2007. Imports/Exports - Global Trade Atlas data for 2005 (HS code: 080810). FAS Madrid estimate/forecast for other years. Area Planted/ Area Harvested/ Domestic Consumption/ Processing/ Withdrawal from market – FAS Madrid estimates/forecast.

Trade

SPAIN: APPLE IMPORTS

Units: Metric Tons

MY:	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Total	186,532	271,116	239,648	278,353	196,758	220,000	230,000
EU-25	138,218	217,692	167,999	187,004	143,464	190,000	170,000
Non-EU	48,313	53,423	71,649	91,351	53,294	30,000	60,000

SPAIN: APPLE EXPORTS

Units: Metric Tons

MY:	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
TOTAL	134,504	69,056	115,488	99,168	150,879	110,000	100,000
EU-25	107,957	51,794	84,518	78,276	89,403	85,000	80,000
Non-EU	26,555	17,265	30,972	20,895	61,480	25,000	20,000

SOURCE: Global Trade Atlas through MY 2005/06. FAS Madrid estimates for all others.

Trade Matrices

Import Trade Matrix

updated 5/23/2007

Country	Spain				Units: Metric Tons	
Commodity	Apples					
Time Period	July/Jun					
Imports for:	2004		2005		2006	
U.S.	1035	U.S.	37	U.S.	0	
Others		Others		Others		
France	92726	France	79207	France	109000	
Chile	41823	Chile	32767	Italy	45400	
Italy	41592	Italy	30152	Portugal	19750	
Germany	20562	Portugal	13164	Germany	15300	
China	18496	Germany	12970	China	7825	
Argentina	18247	Argentina	9744	Belgium	7150	
Portugal	17188	Belgium	5492	Chile	6700	
Belgium	6971	China	5052	Czech Republic	2600	
Brazil	5849	Brazil	2753	Netherlands	2400	
Netherlands	5275	Netherlands	1538	Argentina	1950	
Total for Others	268729		192839		218075	
Others not Listed	8589		3882		1925	
Grand Total	278353		196758		220000	

Export Trade Matrix

updated 5/23/2007

Country	Spain				Units: Metric Tons	
Commodity	Apples					
Time Period	July/Jun					
Exports for:	2004		2005		2006	
U.S.	0	U.S.	0	U.S.	0	
Others		Others		Others		
Portugal	30057	Portugal	32081	France	32700	
France	28282	France	30917	Portugal	17350	
Algeria	6646	Algeria	22152	Algeria	8100	
Italy	5027	Russia	9794	Russia	7820	
Belgium	4092	Netherlands	5450	Netherlands	7400	
Morocco	3371	Morocco	4996	United Kingdom	7370	
United Kingdom	3210	United Kingdom	3760	Germany	5700	
Germany	2707	Belgium	3540	Italy	5600	
Mauritania	1536	Italy	3356	Sweden	3000	
Netherlands	1425	Sweden	2417	Belgium	2900	
Total for Others	86353		118463		97940	
Others not Listed	12815		32416		12060	
Grand Total	99168		150879		110000	

Source: Global Trade Atlas, (Harmonized System commodity code HS 0808.10). MY 2006 is FAS-Madrid forecast.

- Spain is a net importer of apples.
- This is offset by Spain's export of apple juice.

Commodity Name: Fresh Pears

Production, Supply & Distribution Table

PSD Table

Country	Spain								
	Pears, Fresh								
Commodity	2005 Revised			2006 Estimate			2007 Forecast		
	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New	USDA Official	Post Estimate	Post Estimate New
Market Year Begin	07/2005		7/1/2005	07/2006		7/1/2006	07/2007		7/1/2007
Area Planted (HA)	38136	38136	38136	38136	38136	38136	0	0	38136
Area Harvested (HA)	36699	36699	36699	36699	36699	36699	0	0	36699
Bearing Trees	0	0	0	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0	0	0	0
Commercial Production	626000	626000	626000	580400	580400	566000	0	0	550000
Non-Comm. Production	26000	26000	26000	23700	23700	24000	0	0	25000
Production (MT)	652000	652000	652000	604100	604100	590000	0	0	575000
Imports (MT)	35000	35000	35472	40000	40000	29900	0	0	30000
Total Supply (MT)	687000	687000	687472	644100	644100	619900	0	0	605000
Fresh Dom. Consumption	459394	459394	460000	450000	450000	433000	0	0	450000
Exports, Fresh (MT)	150000	150000	158803	127100	127100	128900	0	0	100000
For Processing (MT)	56000	56000	55000	55000	55000	50000	0	0	50000
Withdrawal From Market	21606	21606	13669	12000	12000	8000	0	0	5000
Total Distribution (MT)	687000	687000	687472	644100	644100	619900	0	0	605000

SOURCE: Production – MAPA data through 2006. FAS Madrid forecast for 2007.
Imports/Exports - Global Trade Atlas data for 2005 (HS code: 080820). FAS Madrid estimate/forecast for other years. Area Planted/Area Harvested / Domestic Consumption/Processing/Withdrawal from market – FAS Madrid estimates/forecast.

Trade

SPAIN: PEAR IMPORTS

Units: Metric Tons

MY:	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Total	23,341	38,450	36,762	57,276	35,472	29,900	30,000
EU-25	15,067	27,602	21,861	40,837	25,828	21,530	21,600
Non-EU	8,274	10,848	14,902	16,440	9,645	8,370	8,400

SPAIN: PEAR EXPORTS

Units: Metric Tons

MY:	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08
Total	199,761	122,294	148,657	115,648	158,803	128,900	100,000
EU-25	181,986	112,050	132,007	103,568	139,324	114,700	90,000
Non-EU	17,778	10,248	16,653	12,081	19,479	14,200	10,000

SOURCE: Global Trade Atlas through MY 2005/06. FAS Madrid estimates for all others.

Trade Matrices

Import Trade Matrix

updated 4/26/2007

Country	Spain				
Commodity	Pears, fresh				
Time Period	July/Jun				Units: Metric Tons
Imports for:	2004		2005		2006
U.S.	0	U.S.	0	U.S.	0
Others	Others	Others	Others	Others	Others
Belgium	18767	Belgium	13592	Belgium	13830
Netherlands	8908	Netherlands	6151	Netherlands	8958
Chile	7526	Chile	5189	Portugal	2244
Argentina	7337	Argentina	4106	France	2091
Portugal	6356	Portugal	2050	Germany	894
France	3694	Germany	1717	Italy	753
Italy	1576	France	1452	China	747
Germany	1512	Italy	729	United Kingdom	159
Morocco	822	China	244	Chile	105
South Africa	333	United Kingdom	82	South Africa	69
Total for Others	56831		35312		29850
Others not Listed	445		160		50
Grand Total	57276		35472		29900

Export Trade Matrix

updated 4/26/2007

Country	Spain				
Commodity	Pears, fresh				
Time Period	July/Jun				Units: Metric Tons
Exports for:	2004		2005		2006
U.S.	0	U.S.	0	U.S.	0
Others	Others	Others	Others	Others	Others
Italy	28854	Italy	41059	Italy	34840
Greece	20365	Germany	26537	Germany	23001
Germany	16909	France	19712	France	15147
France	16107	Greece	14909	Russia	14579
Portugal	8984	Portugal	10422	Greece	7899
Russia	5024	Russia	9123	Belgium	5117
Belgium	2954	Belgium	6458	Portugal	4595
United Kingdom	2450	Poland	3597	Brazil	4463
Melilla	2438	Brazil	3579	Poland	3079
Netherlands	2366	Netherlands	3344	United Kingdom	2480
Total for Others	106451		138740		115200
Others not Listed	9197		20063		13700
Grand Total	115648		158803		128900

Source: Global Trade Atlas, (Harmonized System commodity code HS 0808.20). MY 2006 is FAS-Madrid forecast.

- Spain is a net exporter of fresh pears.
- Fresh pear imports are counter-seasonal, occurring between February and August.

Commodity Name: Fresh Table Grapes

Production, Supply and Distribution Table

PSD Table

Country Commodity	Spain Grapes, Table, Fresh								
	2005			2006			2007		
Market Year Begin	USDA Official	Revised Post Estimate	Post Estimate New	USDA Official	Estimate Post Estimate	Post Estimate New	USDA Official	Forecast Post Estimate	Post Estimate New
		01/2006	01/2006		01/2007	01/2007		01/2008	01/2008
Area Planted	23773	23773	23773	23773	23773	23773	0	0	23773
Area Harvested	22711	22711	22711	22711	22711	22711	0	0	22711
Commercial Production	299900	299900	299900	310400	310400	307600	0	0	295000
Non-Comm. Production	9300	9300	9300	9600	9600	10000	0	0	10000
Production	309200	309200	309200	320000	320000	317600	0	0	305000
Imports	28000	28000	28680	25000	25000	28000	0	0	28000
Total Supply	337200	337200	337880	345000	345000	345600	0	0	333000
Fresh Dom. Consumption	226183	226183	195000	230480	230480	206000	0	0	208500
Exports, Fresh	87000	87000	123391	90000	90000	115000	0	0	100000
For Processing	24000	24000	19000	24500	24500	24000	0	0	24000
Withdrawal From Market	17	17	489	20	20	600	0	0	500
Total Distribution	337200	337200	337880	345000	345000	345600	0	0	333000

SOURCE: Area Planted/Area Harvested and Production – MAPA data through 2006. FAS Madrid forecast for 2007. Imports/Exports - Global Trade Atlas data for 2005 (HS code: 0806.10). FAS Madrid estimate/forecast for other years. Domestic Consumption/ Processing/ Withdrawal from market – FAS Madrid estimates/forecast.

- In Spain, the fresh table grape market accepts 4% of total national grape production.
- The Autonomous Communities Valencia and Murcia, located in the southeast of Spain, produce about 85 percent of the country's fresh table grapes.
- About 82% of table grape cultivation is irrigated, which quadruples yield per hectare from 4 to 16 metric tons.

Trade

SPAIN: TABLE GRAPE IMPORTS

Units: Metric Tons

Calendar Year:	2001	2002	2003	2004	2005	2006	2007
Total	24,914	27,403	26,492	35,115	28,680	28,000	28,000
EU-25	14,050	12,151	11,563	16,120	9,745	9,500	9,500
Non-EU	10,866	15,250	14,928	18,996	18,933	18,500	18,500

SPAIN: TABLE GRAPE EXPORTS

Units: Metric Tons

Calendar Year:	2001	2002	2003	2004	2005	2006	2007
Total	122,325	130,505	103,536	113,716	123,391	115,000	100,000
EU-25	119,710	126,705	97,850	109,118	116,281	110,000	95,000
Non-EU	2,618	3,802	5,689	4,599	7,113	5,000	5,000

SOURCE: Global Trade Atlas until CY 2006. FAS Madrid estimates for all others.

Trade Matrices

Import Trade Matrix

updated 4/25/2007

Country	Spain				Units: Metric Tons	
Commodity	Grapes, Fresh					
Time Period	Jan/Dec 05		Jan/Dec 06		Jan/Dec 07	
Imports for MY:	2004		2005		2006	
U.S.	31	U.S.	0	U.S.	0	
Others		Others		Others		
Chile	15,578	Chile	14,471	EU-25 countries	9,500	
Italy	9,338	Italy	6,089	non-EU countries	18,500	
Netherlands	3,152	South Africa	1,510			
Argentina	1,909	Netherlands	1,427			
Portugal	1,601	Argentina	1,394			
Germany	1,173	Peru	1,226			
France	598	Portugal	1,096			
South Africa	473	Germany	545			
Peru	461	Belgium	241			
Brazil	264	Morocco	187			
Total for Others	34,547		28,186		28,000	
Others not Listed	537		494		0	
Grand Total	35,115		28,680		28,000	

Export Trade Matrix

updated 4/25/2007

Country	Spain				Units: Metric Tons	
Commodity	Grapes, fresh					
Time Period	Jan/Dec 05		Jan/Dec 06		Jan/Dec 07	
Exports for:	2004		2005		2006	
U.S.	0	U.S.	0	U.S.	0	
Others		Others		Others		
United Kingdom	28,892	United Kingdom	34,985	EU-25 countries	110,000	
Germany	22,056	Germany	20,153	non-EU countries	5,000	
Portugal	20,848	France	18,498			
France	20,239	Portugal	17,160			
Italy	4,453	Netherlands	5,882			
Netherlands	3,757	Italy	4,385			
Poland	1,912	Poland	3,685			
Belgium	1,699	Estonia	2,322			
Denmark	1,578	Denmark	2,273			
Ireland	1,103	Russia	2,242			
Total for Others	106,537		111,585		115,000	
Others not Listed	7,179		11,806		0	
Grand Total	113,716		123,391		115,000	

Source: Global Trade Atlas, (Harmonized System commodity code HS 080610). MY 2006 is FAS-Madrid forecast.

- Fresh table grape imports are counter-seasonal, occurring between February and August.
- Most imports are from outside the EU, while exports are predominantly to EU member states.

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

Production, Supply & Distribution Table

PSD Table

Country Commodity	Spain Apple Juice, Concentrated						UOM Brix	= (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	
		07/2005	07/2005		07/2006	07/2006		07/2007	07/2007	
Deliv. To Processors	150000	150000	132779	122000	122000	142800	0	0	113000	
Beginning Stocks (MT)	2007	2007	6863	107	107	744	0	0	1806	
Production (MT)	20100	20100	22041	16000	16000	22562	0	0	17628	
Imports (MT)	15000	15000	13689	16000	16000	20500	0	0	20000	
Total Supply (MT)	37107	37107	42593	32107	32107	43806	0	0	39434	
Exports (MT)	25000	25000	31849	19600	19600	32000	0	0	28000	
Domestic Consumption	12000	12000	10000	12000	12000	10000	0	0	10000	
Ending Stocks (MT)	107	107	744	507	507	1806	0	0	1434	
Total Distribution (MT)	37107	37107	42593	32107	32107	43806	0	0	39434	

SOURCE: Production, Delivery to Processors/ Beginning Stocks/ Domestic Consumption/ Ending Stocks – FAS Madrid estimates/forecasts. Imports/Exports - Global Trade Atlas data through 2005 and FAS Madrid estimate/forecast for other years. Spanish apple juice trade appears in the Global Trade Atlas under the harmonized system as H.S. codes 2009.71 and 2009.79.

Note on methodology:

Spanish apple juice trade occurs in two principal six digit categories, which we convert to 70/71 brix as follows: 1) H.S. code 2009.71 (estimated 11.2 degrees Brix)/6.3; and, 2) H.S. code 2009.79 (a mix of two principal concentrates at 72 and 65 Brix with an average of 68.5 Brix)/1.03.

Trade

SPAIN: CONCENTRATED APPLE JUICE IMPORTS

Units: Metric Tons at 70/71 Brix

Calendar Year:	2002	2003	2004	2005	2006	2007
Total	4,618	7,469	14,949	13,689	20,500	20,000
EU-25	3,065	3,686	9,165	6,918	9,800	10,000
Non-EU	1,553	3,783	5,784	6,771	10,700	10,000

SPAIN: CONCENTRATED APPLE JUICE EXPORTS

Units: Metric Tons at 70/71 Brix

Calendar Year:	2002	2003	2004	2005	2006	2007
Total	15,537	27,201	13,859	31,859	32,000	28,000
EU-25	13,465	25,002	11,188	29,000	29,000	26,000
Non-EU	2,073	2,199	2,672	2,850	3,000	2,000

SOURCE: MY 2002-2005 Global Trade Atlas (HS code 2009.79). MY 2006 and MY 2007 are FAS Madrid estimate and forecast. Figures here are given in 70/71 Brix, derived from GTA trade figures given.

MY 2000 and MY 2001 were not included in this time series because before January 2002, the data were categorized differently in the Global Trade Atlas. The 2002 change in the GTA groupings and in the H.S. codes limits our ability to present comparable trade data from before MY 2002.

Trade Matrices

Import Trade Matrix

updated 5/23/2007

Country	Spain		70.5 BRIX		
Commodity	Apple Juice, Conc				
Time Period	July/Jun		Units: Metric Tons		
Imports for:	2004		2005		
U.S.	0	U.S.	0	U.S.	0
Others	Others		Others		
China	4,482	China	5,650	China	8,800
Germany	2,691	Germany	3,500	Germany	4,500
Austria	2,327	Netherlands	2,291	Netherlands	3,500
France	1,526	Turkey	910	Turkey	1,850
Netherlands	1,486	France	430	Hungary	750
Turkey	631	Italy	360	Italy	450
Israel	508	Austria	180	Portugal	275
Hungary	471	Portugal	131	France	180
Italy	459	Israel	50	Austria	70
Belgium	131	Hungary	25	Belgium	30
Total for Others	14,712		13,527		20,405
Others not Listed	236		162		95
Grand Total	14,948		13,689		20,500

Export Trade Matrix

updated 5/23/2007

Country	Spain		70.5 BRIX		
Commodity	Apple Juice, Conc				
Time Period	July/Jun		Units: Metric Tons		
Exports for:	2004		2005		
U.S.	70	U.S.	539	U.S.	0
Others	Others		Others		
United Kingdom	3,643	United Kingdom	9,295	United Kingdom	8,340
France	2,799	France	7,260	France	8,070
Portugal	1,506	Germany	5,320	Ireland	7,370
Netherlands	815	Austria	3,270	Netherlands	2,500
Italy	737	Netherlands	1,480	Germany	1,990
Germany	711	Portugal	1,390	Portugal	1,145
Ghana	698	Ghana	660	Ghana	910
Japan	484	Italy	560	Greece	270
Taiwan	380	Japan	380	Taiwan	245
Morocco	357	Morocco	320	Morocco	240
Total for Others	12,130		29,935		31,080
Others not Listed	1,658		1,375		920
Grand Total	13,858		31,849		32,000

SOURCE: MY 2004-2005 are from Global Trade Atlas and MY 2006 are FAS Madrid estimates. GTA trade figures are transformed to 70/71 Brix as follows: from HS code 2009.71 (single strength equivalent = 11.2 Brix) by dividing by 6.3; and from HS code 2009.79 (mix of apple juice concentrates with average sugar concentration of 68.5 Brix) by dividing by 1.3. A more detailed explanation appears on page 10 of this report.