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## Spain

## Strawberries

## Annual

## 2003

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**Report Highlights:**

A wet spring and the early onset of warm weather reduced output and quality of Spain's 2003 strawberry crop. Despite this setback, poor crops elsewhere in Europe encouraged strong exports to Spain's traditional markets.

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

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## Executive Summary

Spain's 2003 strawberry output reached only 300,000 tons, a 10 percent drop from the previous year. An unusually wet spring and warmer-than-normal temperatures in the primary production area created ideal conditions for molds. As a result, the quality of the crop suffered, forcing April 2003 prices down by a third from last year's levels. For the season, the wholesale price was 0.820 Euros/Kg, compared to 0.937 Euros/Kg in 2002. Total area planted to strawberries in 2003 was 8,000 hectares.

Strawberry production continues to be heavily concentrated, with nearly 95 percent coming from the province of Huelva, in the southern region of Andalucia. Much of the rest of the crop comes from the area around the city of Cadiz.

While the fresh market -- domestic and export -- continues to be the focus of the industry, about 10-to-15 percent of the fruit is diverted to industrial use for frozen strawberries, jams and flavorings.

The strawberry industry is continuing its efforts to develop varieties especially adapted to the soil and weather conditions of Huelva. Resistance to molds and fungus is a major goal of this research, since soil treatments with methyl bromide and chloropicrin are becoming problematic.

**FRESH STRAWBERRIES****PS&D Table****PSD Table**

Country	Spain						UOM
	Fresh Strawberries (HA)(MT)						
Commodity	2002	Revised	2003	Estimate	2004	Forecast	MM/YYYY
	USDA Official [Estimate [DA Official [Estimate [DA Official [Estimate [New]	01/2002	01/2003	01/2004			
Market Year Begin							
Area Planted	7500	7800	8000	8000	0	8000	(HA)
Area Harvested	7300	7800	8000	8000	0	8000	(HA)
TOTAL Production	301000	330000	310000	300000	0	320000	(MT)
Imports, Fresh	5660	5660	3000	8000	0	5000	(MT)
TOTAL SUPPLY	306660	335660	313000	308000	0	325000	(MT)
Exports, Fresh	190000	184669	205000	211000	0	215000	(MT)
Domestic Fresh Market	64660	90991	68000	58000	0	65000	(MT)
For Processing	52000	60000	40000	39000	0	45000	(MT)
TOTAL UTILIZATION	306660	335660	313000	308000	0	325000	(MT)

**Production**

Spanish strawberry production for marketing year 2003 (Jan-Dec) was 300,000 tons, a ten percent decrease from MY 2002. According to industry sources, 16 percent of the total crop came from strawberries planted under an "integrated production" system. This type of production is designed to obtain a better quality product using the different elements from the "agro system" (water, plant, soil and weather) more effectively with the goal of reducing environmental impact and keeping the production profitable. This process carefully regulates the use of pesticides.

**Consumption**

Domestic fresh strawberry consumption in MY 2003 totaled 58,000 tons, around a third lower than MY 2002. The high incidence of mold in production areas reduced both the amount of marketable fruit and its shelf life. Fresh strawberries are a popular spring fruit; they are usually served with cream or used to decorate cakes and tarts.

**Trade**

Despite the problems with the 2003 crop, strawberry exports reached an estimated 211,000 tons, or 14 percent above the previous season. The ready market for this lower quality crop reflects the problems of other early season producers in Europe. The main markets were Germany, France, United Kingdom, Italy and Belgium. Industry sources say that a significant quantity of fruit was spoiled on arrival in these markets and was returned to shippers.

As Spain is a major producer and exporter of fresh strawberries, imports are generally small. For MY 2003, imports are estimated at around 8,000 tons. Most were later season fruit from France.

## Export Trade Matrix

Country Spain

Commodity Fresh Strawberries

Time Period	CY	Units:	Metric Tons
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Germany	91269	Germany	65275
France	53360	France	46862
United Kingdom	17530	United Kingdom	20161
Italy	13962	Italy	14944
Belgium	10935	Belgium	13534
Portugal	6882	Portugal	7697
Netherlands	5615	Austria	5402
Austria	5401	Netherlands	4686
Switzerland	2019	Czech Republic	2216
Total for Others	206973		180777
Others not Listed	5117		3892
Grand Total	212090		184669

## Import Trade Matrix

Country Spain

Commodity Fresh Strawberries

Time Period	CY	Units:	Metric Tons
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
France	1947	France	4306
Morocco	1003	Morocco	1297
Belgium	137		
Total for Others	3087		5603
Others not Listed	49		60
Grand Total	3136		5663

**FROZEN STRAWBERRIES****PS&D Table****Production****PSD Table**

Country Commodity	Spain Frozen Strawberries						UOM
	2001		2002	2003		Forecast	
Market Year Begin	USDA Official	Revised Estimate	DA Official	Estimate	DA Official	Estimate [New]	MM/YYYY
	01/2002	01/2002	01/2003	01/2003	01/2004		
Deliv. To Processors	52000	60000	50000	39000	0	45000	(MT)
Beginning Stocks	39	39	1989	1990	489	90	(MT)
Production	33250	35250	31000	25000	0	28500	(MT)
Imports	9800	11163	8000	14000	0	15000	(MT)
TOTAL SUPPLY	43089	46452	40989	40990	489	43590	(MT)
Exports	19100	22462	20500	22000	0	23000	(MT)
Domestic Consumption	22000	22000	20000	18900	0	20000	(MT)
Ending Stocks	1989	1990	489	90	0	590	(MT)
TOTAL DISTRIBUTION	43089	46452	40989	40990	0	43590	(MT)

Frozen strawberry production for MY 2003 totaled around 25,000 tons, off a third from MY 2002. Lower deliveries to processors reflect the reduction in marketable fruit available on the market.

**Consumption**

Most frozen berries are processed into jams, yogurt and flavorings. Domestic consumption will fall only slightly in MY 2003, as most of the production shortfall will be made up with imports and carryover stocks.

**Trade**

MY 2003 exports should continue at nearly the same level as MY 2002, as processors give priority to their traditional customers in Western Europe. MY 2003 imports will rise to help fill the production shortfall. Morocco continues to be the major supplier of frozen strawberries to Spain.

## Export Trade Matrix

Country Spain

Commodity Frozen Strawberries

Time Period	CY	Units:	Metric Tones
Exports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
France	4705	Netherlands	6840
Netherlands	4504	France	5169
Germany	3502	Germany	3947
Italy	1271	UK	1151
Austria	1080	Belgium	1071
UK	675	Italy	892
		Austria	863
Total for Others	15737		19933
Others not Listed	3070		2529
Grand Total	18807		22462

## Import Trade Matrix

Country Spain

Commodity Frozen Strawberries

Time Period	CY	Units:	Metric Tones
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Morocco	6911	Morocco	10517
Belgium	221	France	284
Germany	86	Belgium	230
Total for Others	7218		11031
Others not Listed	128		132
Grand Total	7346		11163