

Voluntary Report – Voluntary - Public Distribution

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Report Name: Spanish Berry Outlook

Country: Spain

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Report Highlights:

The Spanish strawberry sector is robust, with production mainly destined for the domestic market, the EU, and UK. Other berry production, especially blueberries, raspberries, and blackberries, has become an alternative in recent years to strawberry production as a value-added crop for Spanish farmers. The berry sectors in both Spain and United States share numerous links, specifically with the use of U.S. berry varieties and technology in Spain.

Background

Soft Fruit Planted Area in Spain Remains Stable in 2023

In Spain, berry production, especially blackberries, blueberries and raspberries, is well structured and in recent years has increased as an important value-added crop for Spanish farmers ([see GAIN report](#)). Spanish soft fruit farmers have embraced berries as the best way to diversify their activity and minimize the risks related with strawberry monoculture and the strong competition for strawberries relative to the rest of soft fruits. There is an increasing demand for soft fruits in Spain, within the European Union (EU), and in third countries. This is reflected in the main Spanish region for red fruit production, Huelva in Andalusia, where soft fruit farmers are opening new markets and business lines designed to achieve greater profitability for their business. Although farmers in Huelva increased the planted area for blackberries, blueberries and raspberries in the last few years, planted area may remain stable in 2023 according to Freshuelva, the association of berry producers and exporters in Huelva, the major and almost unique berry production region in Spain. The current diversity of berry varieties makes it possible to have higher production throughout most of the year and gain market share from countries such as Chile or Peru.

However, the Spanish red fruit sector is facing a new season full of uncertainties and adverse situations due to the persistent drought across Spain and the increases in essential input costs (mainly energy and fertilizers). Additionally, unpredictable weather has already negatively affected the sector in the planting phase, especially due to the high temperatures and the lack of rain. The Russian conflict in Ukraine also created uncertainties in the flow trades, with third country fruit production now entering the EU instead of Russia and Ukraine and increasing competition.

For the 2022/23 season, according to [official data](#), Huelva shows a total red fruit planted area of 13,447 HA (hectares) mainly in greenhouses, which means a slight decline of 0.47 percent compared to the previous season. According to the Spanish Ministry of Agriculture, Fisheries, and Food (MAPA), in 2022/23 season the strawberry production amounted to 346,484 tons and 7,328 HA. The high temperatures and the lack of rain during October 2022, as well as an increase in planting costs and extreme drought during spring 2023 are the main reasons for the planted area remaining flat. Spain is the largest EU strawberry producer, representing 30 percent of total EU strawberry production.

Conversely, a growth in planted area is experienced in blueberries, which went from 4,138 HA planted last season to 4,278 HA this year. The blueberry crop is the second largest berry production in Spain behind strawberries, although blueberries face greater competition from third countries, particularly during the spring months. MAPA estimated a total blueberry production of 70,381 tons in 2022/23 (Chart 1).

Chart 1. Spanish Strawberry, Raspberry, and Blueberry Production

| Producción (t) | 2021/2022 | 2022/2023 | Media 5 | Variaciones 2022/2023 | |
|---------------------------|----------------|----------------|----------------|-----------------------|--------------|
| | | | | vs 2021/2022 | vs Media 5 |
| Fresa/Fresón | 314.567 | 346.484 | 320.825 | 10,15% | 8,00% |
| Frambuesa | 44.964 | 40.280 | 49.021 | -10,42% | -17,83% |
| Arándano | 70.417 | 70.381 | 55.413 | -0,05% | 27,01% |
| TOTAL FRUTOS ROJOS | 429.948 | 457.145 | 425.259 | 6,33% | 7,50% |

Fuente: Avances de superficies y producciones de cultivos – MAPA (ene-23) y Junta de Andalucía (mar-23)

Source: Spanish Ministry of Agriculture, Fish, and Food (MAPA)

*Fresa: Strawberry; Frambuesa: Raspberry; Arándano: Blueberry

The area dedicated to blackberries also experienced an increase of three percent from only 139 HA to 143 HA. In this case, new varieties are incorporated that allow production to be carried out throughout the entire year. In the raspberry sector, planted area decreased for a second year in a row by 7.5 percent to 1,841 HA, compared to the 1,992 HA of last year. The raspberry is the red fruit most affected by competition from non-EU production, competing in European markets with fruit from third countries with lower productions costs, as Freshuelva has repeatedly stated to the Spanish and European administrations. This situation led many raspberry producers to bet on other berries, given the lack of profitability.

Varieties Planted in Spain

The *Fortuna* and *Rociera* strawberry varieties were the most planted varieties in the 2021/2022 season in Huelva, accounting for 47.6 percent of the total planted, representing 31.1 percent and 16.5 percent of the production respectively. However, according to the annual study prepared by the Spanish Strawberry Group (Ifapa), this dominance has been declining in recent years. The *Florida Fortuna* variety developed by the University of Florida continues to be the most cultivated variety for the eighth consecutive year but decreased by 4.5 percent when compared to the previous season. The *Rociera* variety also decreased by 16.5 percent in the current season. In recent years, there has been growth in demand of new varieties such as *Florida Pearl* (see picture), *Victory*, *Calinda*, *Palmerita*, and *Leticia* varieties, as producers search for new candidates to add to the most used varieties. Spanish berry growers are also using blueberry and raspberry genetics, breeding plants, and technical services developed in the United States.

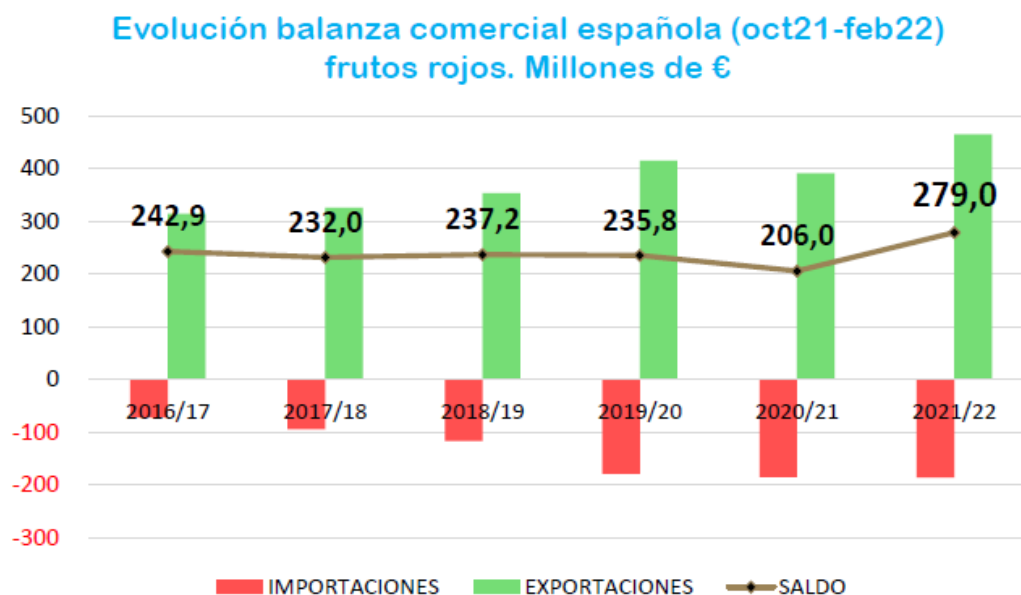


FAS Madrid picture of *Florida Pearl* variety grown by EMCO CAL.

Spain Is a Net Berry Exporter

According to Spanish [official data](#), Spain is a net exporter of red fruits, with a positive balance of \$307 million (€279 million) in the 2021/22 October-February season (see Chart 2). In Spain, the strawberry is the major red fruit produced and exported, with other EU Member States and the UK as the major export destinations. In the last season, the strawberry unit value increased 8 percent compared to previous season and 17 percent compared to the last five years average (see Chart 3). However, raspberry and blueberry unit values decreased 5 and 4 percent respectively compared to the previous season.

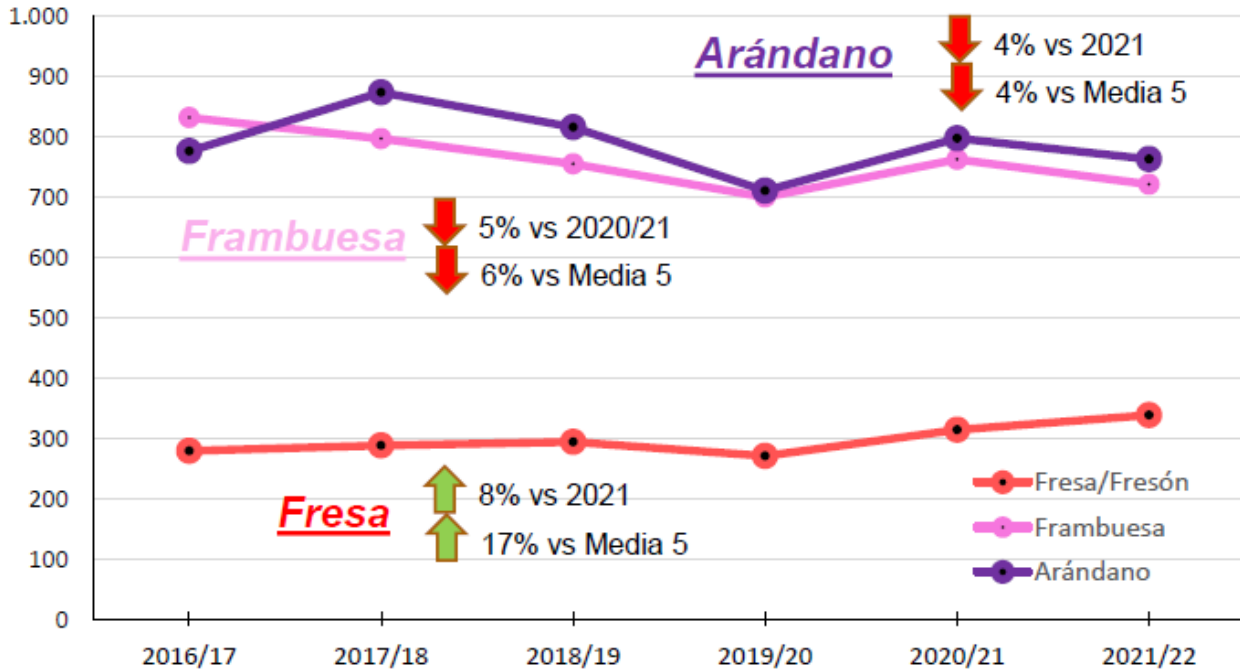
Chart 2. Red Fruit Trade Balance 2016-2022 (in million Euro)



Source: Spanish Ministry of Agriculture, Fish, and Food (MAPA)

Chart 3. Red Fruit Unit Value 2016-2022 (€/100 kg)

**Evolución valor unitario español de exportación.
Frutos rojos (€/100kg)**



Source: Spanish Ministry of Agriculture, Fish, and Food (MAPA)

According to Trade Data Monitor (TDM), Spain is the main EU strawberry exporter and the second largest exporter worldwide in value terms after Mexico, valued at \$780 million and 280,000 tons in Calendar Year (CY) 2022, with a positive trade balance valued at \$747 million. Ninety-five percent of Spanish strawberry exports go to other EU Member States. Outside the EU, the UK is the most important destination for Spanish strawberries. Last year, Spain’s strawberry imports reached 12,000 tons, valued at \$31 million and mainly sourced from Morocco and the EU, particularly Greece and Portugal.

Similarly, Spain is the fourth major worldwide exporter of blueberries following Peru, the Netherlands, and Chile, worth \$508 million in CY 2022 and totaling 87,000 tons, with also a positive trade balance of \$271 million. Spanish blueberry imports are mainly sourced from Morocco and Peru. Additionally, Spain is also the second largest raspberry exporter worldwide after Mexico and valued at \$545 million and 72,000 tons with a positive trade balance of \$275 million. Similar to strawberries, major destinations of Spanish blueberries and raspberries are the EU and UK.

Attachments:

No Attachments.