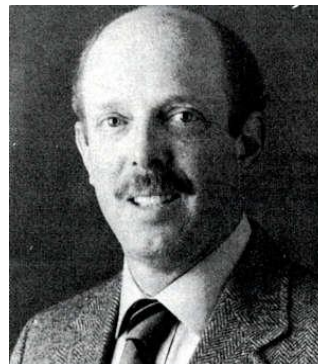


Field Notes from Abroad — Spain

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(The author made field trips to Spain and Israel in 1989 to assess the current status of the avocado industries in those two countries. He has summarized his findings in this and the next following report.)

OVERVIEW

At the time of my visit (May 23-28), the Hass trees were in their final stage of flowering. The set on the numerous groves I visited was not impressive. The general feeling among the growers and exporters is that the 1989-90 avocado crop will not exceed the 1988-89 volume.

Export Potential

Based on this feeling, and including the expected volume from young trees, the projected 1989-90 avocado export volume from Spain is 70 million pounds (all varieties).

Based on an analysis of historical shipments, the monthly export volume in the 1989-90 season is potentially as follows:

Month	Pounds	Varieties
September	770,000	Bacon only
October	8,274,000	Bacon, Zutano, Fuerte
November	9,555,000	Zutano, Fuerte
December	12,236,000	Fuerte, Hass
January	9,273,000	Hass, others
February	9,702,000	Hass, others
March	13,433,000	Hass, Reed, others
April	5,145,000	Hass, Reed, others
May	742,000	Hass, Reed others
June	420,000	Hass

General Observations

In a relatively short period of time, 1978-1988, the Spanish avocado acreage has gone from almost nothing to a current estimated 12,000 acres.

Most of this growth has been in the southern regions of the Iberian Peninsula: Granada and the coastal areas around Malaga.

The climate and soil conditions provide very favorable conditions for avocado production.

In the Canary Islands, avocados are slowly replacing banana acreage, and now total an estimated 3,000 acres.

The expansion of the Spanish avocado industry has not been directed by the government. Indeed, there is very little government intervention and very little financial encouragement. Financing decisions are being made, in most cases, without reliable profit/loss projections. Dr. Javier Calatrara, of the Agriculture Department, predicts that the most recent plantings will not become profitable economic entities. Still, an estimated 150,000 new trees will be planted in 1989. The past two seasons of low volume from Israel have provided the Spanish avocado growers with record revenue and accelerated the desire to plant more acreage.

The main variety being grown is Hass. Due to its early harvest—and high price—most growers choose Bacon as their second choice. Gwen has become a serious option; the first tree of this variety was planted five years ago.

PRODUCTION Varieties			
	Acres	Percent	Season
Hass	7,200	60%	Dec-May
Fuerte	2,400	20%	Oct-Dec
Bacon & Zutano	1,200	10%	Sep-Oct
Reed	600	5%	Mar-May
Others	600	5%	Oct-May
All	12,000	100%	Sep-May

Yields	
Crop Year	Pounds
83-84	25,000,000
84-85	28,000,000
85-86	22,000,000
86-87	39,000,000
87-88	66,000,000
88-89	44,000,000
89-90 (est.)	70,000,000

Cultural Aspects

Water availability is biggest problem.

Poor pollenization in some areas.

Soil fungus: *Armillaria*.

Root rot.

Lack of qualified entomologists.

Heavy winds in winter.

MARKETING

The development of the Spanish avocado industry has been, for the most part, unorganized. Exports to France are by truck. All sixteen exporters have their own labels. At this time, no promotional work is done in Europe.

Due to the upcoming EEC agreements, however, the Spanish avocado industry sees a tremendous advantage over other exporters—especially Israel. In April of this year, the major exporters agreed to provide funds to develop a coordinated export program. At the time of my visit, details of this program were being developed.

Domestic consumption, which was over 65% of the crop in 1986, has now leveled off at about 22 million pounds per year.

INCIDENTAL NOTE

According to Mr. Julian Dias, the largest avocado exporter in Spain and the owner of one of Spain's largest avocado groves, the Spanish future includes lychee, mango (there is increasing interest in both), and macadamia. As with avocado, the climate is ideal for these crops. The minimum temperature recorded in these areas has not gone below -2°C during the past 20 years.

(Information regarding the Spanish avocado industry was provided by the Ministerio de Economía y Hacienda, S.O.I.V.R.E., Granada, Spain. Special thanks are due to Miguel Vilchez Barros.)