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An Update of the Spanish Avocado Industry

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In 1955, a native German of Chilean nationality, Roger Magdal, established together with a Vasque-Spanish, Luis Sarasola, the first commercial avocado plantation in Spain. It covered 3 ha of a beautiful village known as Almunecar on the coast of Granada.

Long before that, a huge number of isolated avocado trees were to be found in the Canary Islands. They were the descendants of seed from South America, particularly Venezuela. Immigrants brought the seed of this fascinating tree, similar to the bay but producing a fruit with a very special butter-like taste, although different from the butter coming from milk.

This was the beginning of the Spanish avocado industry. At the same time, the manager of the Orotava Botanical Garden, Mr. Garcia Cabezon, was experimenting with new cultivars as an avocation. There was no commercial activity regarding avocados although a small amount of fruit was arriving in France from the Caribbean Islands.

Thirty-five years later, the 3 ha has grown into an industry with an expected production of 30,000 metric tons in the 1990-91 season. Avocado plantations are spread over the regions of Andalucia and Valencia on the southern coast of Spain. (Fig. 1).

If climatic changes do not alter the growth of the plants, prudent forecasts based on the 1990 estimate of 10,100 planted ha (9,000 on the mainland and 1,100 in the Canary Islands) indicate that Spain will be producing 70,000 metric tons (perhaps 80,000) annually by 1995. Thus, Spain could become the principal avocado exporter to Europe by that time (Table 1).

It is unlikely that the number of planted hectares will increase for two reasons: scarcity of water and low profitability caused by production costs rising faster then prices (Table 2).

Fig. 1.   Avocado growing regions in Spain.

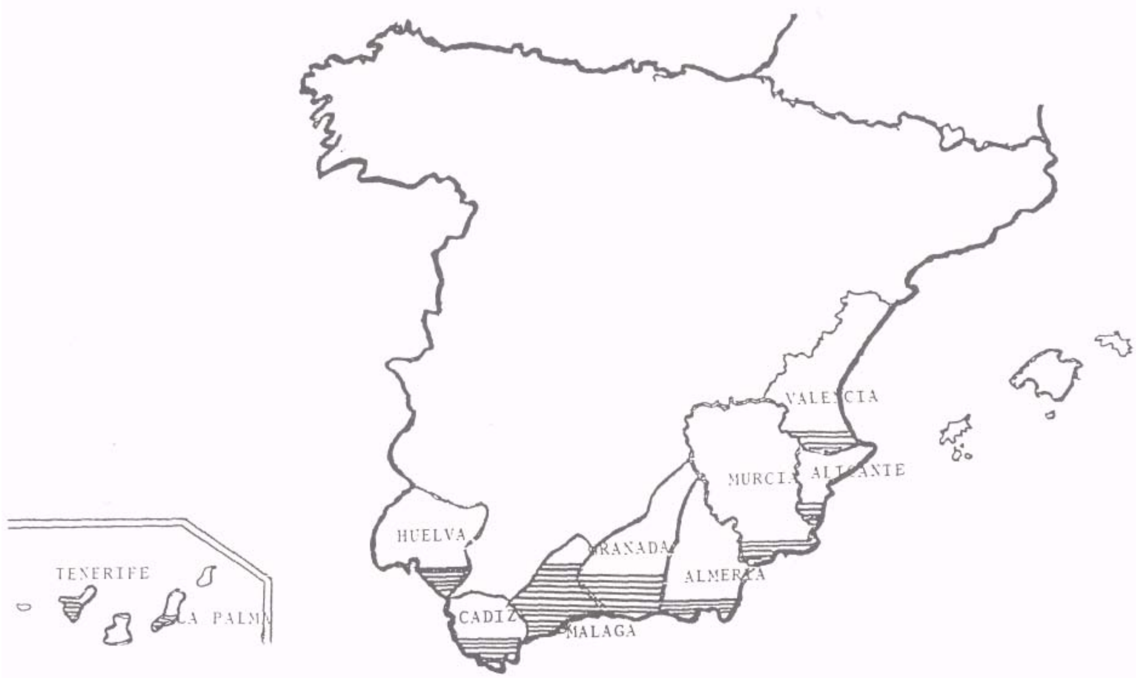

Table 1.   Avocado plantations in Spain[z].

Year	Iberian Peninsula (ha)	Canary Islands (ha)	Total (ha)	% annual increase
1987	4,554	700	5,254	...
1988	6,186	952	7,138	35.85
1989	7,000	975	7,975	11.72
1990	8,050	1,000	9,050	13.47
1991	9,000	1,100	10,100	11.60

[z] The 1988 figures are based on the Monthly Agricultural other years are approximate estimates.

Table 2. Avocado production in Spain.

Year	Actual production (metric ton) [z]	Year	Estimated production (metric ton) [v]
84/85	14,387	90/91	30,800
85/86	18,926	91/92	43,500
86/87	15,084	92/93	41,800
87/88	29,326	93/94	56,300
88/89	21,171	94/95	58,000
89/90	27,027	95/96	70,500

[z] Estimate of J. Calatrava

[y] Estimate of J. Diaz Robledo

In regard to quality, the Spanish avocado is comparable to those exported to Europe from Mexico, Israel, and South Africa. Even the average size of the Spanish 'Hass[1] is bigger than the size of the 'Hass' produced by Israel. This is probably due to the younger age of the Spanish avocado orchards.

Avocado cultivars now grown in Spain don't fit exactly with the EEC requirements since they have switched from the smooth-skinned cultivars to the rough-skinned ones over the last six years. Today the trend is towards 'Hass' with EEC consumers preferring it in terms of taste. Table 3 gives the current distribution of avocado cultivars produced in Spain and a forecast for 1995 which predicts 'Hass' to account for 70% of Spanish production. Also 'Fuerte' and 'Bacon' production will remain stable due to their mid- and early-season maturities. This allows these cultivars to be sold at higher prices than those imported from Chile or South Africa despite their inferior taste (Table 3).

The Spanish domestic market for avocados is below that expected of a producer country. The Spanish consumer consumes fresh fruit at among the highest rates in the EEC, but its avocado consumption level is still very small (11,334 metric tons in 1990). This is not due to the fact that avocado is new commodity since kiwi consumption has risen from none in 1980 to 24,000 metric tons today and may double in the next five years. On the other hand, the avocado has been marketed in Spain for 30 years and still Spaniards consume only 286 g per capita annually. This is practically nothing when compared to the other consumers such as Mexicans (7 kg/yr), Israelis (3 kg/yr), and French (1.2 kg/yr) despite France not being a producer country. Table 4 shows a great difference in consumption between the Canary Islands and the Spanish mainland. In Table 5, avocado imports, while small, have been compared to domestic production in terms of consumption.

Table 3. Avocado cultivars grown in Spain and their harvest periods.

Cultivar	% of Total[z]	Harvest Period
1985 to 1990 (actual)		
Bacon	19	Sept. to Dec.
Fuerte	21	Oct. to Jan.
Hass	44	Dec. to May
Reed	5	Mar. to June
Others[y]	11	Sept. to July
1991 to 1995 (estimated)		
Bacon	12	Sept. to Dec.
Fuerte	14	Oct. to Jan.
Hass	70	Dec. to May
Others[x]	4	Sept. to July

[z] Estimates of J. Diaz Robledo
[y] Zutano, Nabal, Pinkerton, Torrox, Esther
[x] Zutano, Reed, Gwen

Table 4. Domestic per capita consumption of Spanish avocados[z]

Period	Iberian Peninsula (g/person)	Canary Islands (kg/person)
84/85	132	1.17
85/86	170	1.29
86/87	184	1.01
87/88	182	1.58
88/89	163	1.49
89/90	218	1.65

[z] Estimates by J. Calatrava and Canary Island Agricultural Council

Table 5. Per capita consumption of domestic and imported avocados in Spain.[z]

Period	Domestic fruit (metric tons)	Imported fruit[y] (metric tons)	Total (metric tons)	Per capita consumption (g)
84/85	6,766	103	6,869	0.174
85/86	8,406	102	8,508	0.215
86/87	9,511	198	9,709	0.245
87/88	9,279	245	9,524	0.241
88/89	8,427	326	8,753	0.221
89/90	10,923	411	11,334	0.286

[Z] Estimate of J. Diaz Robledo
[Y] Includes imported fruit and fruit entering at the border from neighboring countries.

Table 6. Distribution of Spanish avocado production between domestic and export markets.

Period	Total production[z] (metric tons)	Domestic market[z] (metric tons)	Domestic market (% of total)	Export marketv (metric tons)	Export market (% of total)
84/85	14,387	6,766	47	7,621	53
85/86	18,926	8,406	44	10,520	56
86/87	15,084	9,511	63	5,573	37
87/88	29,326	9,279	32	20,047	68
88/89	21,171	8,427	40	12,744	60
89/90	27,027	10,923	40	16,104	60

[Z] Estimates of J. Calatrava
[Y] Soivre Granada

If we analyze the reasons for low demand, we can summarize them as follows: (i) the atypical flavor of avocados which causes consumers to resist tasting the fruit and make it likely that it will be rejected if the fruit is not of the highest quality, and (ii) the lack of promotion and advertising directed at the consumer. In the thirty years that the avocado has been available in Spain, promotional materials have never been widely produced. Four brochures and four recipe booklets offered by a commercial firm are all that have been produced in support of the avocado.

Those who know the fruit and value its cosmetic and nutritional qualities need to recognize the unjust treatment the avocado has received. We are confident that the Spanish consumer will respond positively to the avocado if it is promoted properly.

Because the fruit is so different from other currently available fruits, we must also instruct the consumer in how to prepare and eat an avocado. However, there is no indication of either this promotion or education being done in the future.

Avocado marketing requires people who understand how to eat them and especially how to sell them. Passive attitudes and high prices imposed by producers could be the main factors for this low level equilibrium of the domestic market for Spanish avocados. The prices imposed by producers during the last 5 years range from 100 to 200 pesetas/kg which translates to $1000 to $2000 per metric ton.

A goal for the Spanish avocado industry has to be the tripling of domestic consumption by 1996 when the current plantings will be at full production. In this way 40% of the expected production will be consumed by the domestic market. If by this time, the European market has also increased, even by only 20%, we shall be able to export the other 60%. Table 6 presents the share of Spanish production allocated between exports and domestic consumption.

Spain has an additional advantage due to its geographic location being close to the more important European markets. This reduces transportation costs and eliminates the need for refrigeration. This advantage will be fully realized after 1996 when Spain becomes a full member of the EEC.

Conclusion

In conclusion, we hope that the future of Spanish avocado plantations will be better than the past. Marketing and advertising campaigns by Israel to develop a 100,000 metric ton demand in Europe can indirectly benefit the Spanish avocado industry.

These features give the Spanish avocado industry a very good competitive position against Israel and Mexico. Nevertheless, Israel has always to be considered the export pioneer and market developer in Europe, while Mexico is the native home of and by far the largest producer of avocados.

We really believe that Spanish avocado growers produce an excellent, high-quality product and that they will contribute, to some extent, to the promotion of consumption of this wonderful product throughout the world.