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A General View of the Citrus Sector in Spain

Sergio Mari and Elena Peris

This paper offers some economic information about the current situation of the citrus sector in Spain. Spain is the fourth-largest citrus producer in the world, with 6% of worldwide production in 2001 (MAPYA 2004), and the largest producer of citrus for fresh consumption. Oranges represent 51% of the total Spanish production of 2001 (5,707,000 tonnes), followed by tangerines (31%), lemons (18%), and grapefruit (less than 1%).

Citrus production in Spain is mainly located in four regions: Catalonia, the Comunidad Valenciana (CV), Murcia, and Andalusia. The CV is the most important, not only in acreage, but also regarding citrus farm tradition.

The CV production is focused on oranges and tangerines for fresh markets, with a stepped harvesting season that runs from September to June depending on the varieties grown: Satsumas, Early, Middle or Late Clementines, Navel Oranges, White Oranges, Late Oranges, or Hybrids. The CV's citrus production represents 70% of the Spanish citrus harvest. Moreover, the citrus sector is one of the most important bases of the CV's economy, accounting for 70% of the agrarian trade balance of the region and 30% of that for Spain.

Of a total production of 5,944,000 tonnes of Spanish citrus in 2002–2003, 56% was exported, 22% was marketed for fresh domestic consumption, and another 17% was sent to industry (Sécretariat General du CLAM 2003). Forty-seven percent of the oranges and 69% of the tangerines were exported for fresh consumption, the main customers being other European Union countries, especially

Germany and France.

The main problems of the CV citrus sector are the small size of holdings and the high production costs, although the competitiveness of the sector has to be measured in quality terms. A negative consequence of the small farms is the lack of mechanization. A recent study shows that mechanization of citrus farming could save 186 hours of labor per hectare, which translates to a cost reduction of between 2,900 and 4,130 Euros per hectare (MAPYA 2003).

The cooperative sector, which is responsible for 34% of the citrus market share in the Comunidad Valenciana (Juliá, Mari, and Peris 2003), could offer solutions to those problems mentioned above, through, for example, common management or land cooperatives.

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