

# Entering the Spanish market for fresh fruit and vegetables

Taste and internal fruit quality are important characteristics for consumers in Spain, but other quality requirements may become stricter because of the growing market share of large supermarkets and the presence of international purchase centres. However, Spain's wholesale market also remains an important channel with a key role for experienced importers. The best way to enter the Spanish market is to stand out from the Spanish growing season and other competitive sources, such as Morocco and Peru.

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## 1. What are the requirements for fresh fruit and vegetables to enter the Spanish market?

Fresh fruit and vegetables must comply with the European requirements for fresh fruit and vegetables to enter Spain as well. You can find these in the [buyer requirements for fresh fruit and vegetables](#) on the CBI market information platform. The [Trade Helpdesk](#) also provides an overview of export requirements for fresh products per country.

### What are the mandatory requirements?

#### Pesticide residues and contaminants

Pesticide residues are one of the crucial issues for fruit and vegetable suppliers. To avoid health and environmental risks, the European Union has set maximum residue levels (MRLs) for pesticides and other contaminants, such as heavy metals, in and on food products. Products exceeding the MRLs are withdrawn from the market.

In Spain, you must comply with the European legal standards. But contrary to several northern European markets, there is less pressure in Spain to supply fruit and vegetables with lower levels than the legally required MRLs. This is expected to change in the near future because of increasing preoccupation with health issues and a greater dominance of supermarket chains. For example, the supermarket chain Eroski already has a lower limit for single active substances of 50% of the legal MRL.

#### Tips:

Check [the EU Pesticides database](#) to find all MRLs and those specific for fresh fruit and vegetables. Search by product or pesticide and the database to find the list of associated MRLs.

Use [integrated pest management](#) (IPM) in production to reduce the use of pesticides. IPM is an agricultural pest-control strategy that includes growing practices and chemical management.

Read more about MRLs [on the website of the European Commission](#). Check with your buyers if they require additional requirements on MRLs and pesticide use.

## Microbiological criteria

Food safety authorities can withdraw imported fruit and vegetables from the market or prevent them from entering the European Union when Salmonella, E. coli or other microbes are found ([Regulation No 2073/2005](#)).

The European Food Safety Authority [recommends good agricultural, hygiene and manufacturing practices](#) to reduce contamination. When processing and handling fresh fruit and vegetables, you are required to implement a HACCP-based food safety management system.

### Tip:

Make sure to use clean water and equipment for the cultivation and processing of fresh fruit and vegetables. Maintain also good hygiene practices in case of hand-picking or manual processing.

## Phytosanitary regulation

Many products such as citrus, stone fruit, berries, grapes, mangoes and avocados are subject to plant health checks before entering or moving within the European Union.

In the case of Spain, expect additional pressure from sector organisations that defend the interests of Spanish growers. In case there is a risk of harmful organisms or pests from non-European products, these organisations will lobby at European level to increase phytosanitary inspections or even close borders for specific origins. These restrictions have been applied, for example, on lemons from Turkey due to exceeding MRLs and on citrus fruit from South Africa due to black spot disease.

### Tip:

Learn more about the European phytosanitary rules in [Council Directive 2000/29/EC](#) and the new [Implementing Directive 2019/523](#) on the protective measures against the introduction of harmful organisms in the European Union.

## Quality standards

You can find more than 50 specific marketing standards for fresh fruit and vegetables in the [standards database](#) of the United Nations Economic Commission for Europe (UNECE).

Fruit and vegetables that are not covered by specific marketing standards, must at least comply with the [general marketing standards](#). According to the minimum quality requirements, the products shall be:

- intact;
- sound – products must be free from rotting or deterioration likely to make them unfit for consumption;
- clean, practically free of any visible foreign matter;
- practically free from pests;
- practically free from damage caused by pests affecting the flesh;
- free of abnormal external moisture;
- free of any foreign smell and taste.

The condition of the products must enable them:

- to withstand transport and handling;
- to arrive in satisfactory condition at the place of destination.

A tolerance of 10% by number or weight of product not satisfying the minimum quality requirements shall be permitted in each lot. Within this tolerance, not more than 2% in total may consist of produce affected by decay.

Class I is usually a preferred minimum quality for fresh fruit and vegetables, although appearance is not yet as important as in northern Europe. Because Spain is a large producer, consumers are more used to seeing different product classes on the market.

For several fresh fruit and vegetables, you can find examples with images of grading in different classes in the [Fruit and Vegetables Scheme](#) of the Organisation for Economic Co-operation and Development (OECD).

### **Tips:**

Get familiar with the [Commission Implementing Regulation \(EU\) No 543/2011](#) which provides detailed rules for the application of Council Regulation (EC) No 1234/2007 in respect of the fruit and vegetables and processed fruit and vegetables sectors.

Maintain strict compliance with quality, delivering it as agreed with you buyer. Being lenient or stretching your standards will lead buyers to raise issues with quality.

## **Minimum maturity requirements**

The products must be sufficiently developed, but not overdeveloped; fruit must display satisfactory ripeness and must not be overripe.

The development and state of maturity of the products must enable them to continue their ripening process and to reach a satisfactory degree of ripeness. The minimum maturity depends on the specific fruit and is often measured, for example through the brix sugar content or dry matter. Find out what the general requirements are for your product in the [CBI product studies in the fresh fruit and vegetables sector](#).

## **Marking of produce origin**

The marking of the product must include the full name of the country of origin. For non-EU products, the used language must be understandable for the consumer, which is Spanish.

## **Size and packaging**

Size and packaging are often product specific. For all products, the contents of each package must be uniform and contain only fruits of the same origin, variety and quality.

### **Tips:**

See the [product factsheets on the CBI market information platform](#) for the size and packaging requirements of different fruit and vegetables. You can also compare your packaging with those of Spanish producers, but always discuss specific packaging requirements and preferences with your customers before shipping.

Find the legal requirements for labelling in the [buyer requirements for fresh fruit and vegetables](#) on

the CBI market information platform.

Check the additional requirements if your product is pre-packed for retail in the [Codex General Standard for the Labelling of Prepackaged Foods](#) or [Regulation \(EU\) No. 1169/2011](#) on the provision of food information to consumers in Europe.

## What additional requirements do buyers often have?

### More attention to certification

Spanish buyers are not as strict as those in northern European countries in terms of certification. For most traditional buyers, compliance with European legal standards will be sufficient. However, large distribution channels, such as supermarket chains, are increasingly following the same standards as their northern European counterparts. For example, supermarkets in Spain, such as Mercadona, Lidl and sometimes Carrefour, have started to ask for [GlobalG.A.P.](#) certification.

Fruit packers and exporters in Spain often have [BRCGS](#), [IFS](#) or similar food safety management systems. These management systems are recognised by the [Global Food Safety Initiative \(GFSI\)](#) and will also become more important for exporters that supply to the Spanish market.

Social and environmental certification is less often required in Spain, although adapting standards such as Sedex Members Ethical Trade Audit ([SMETA](#)) or [GlobalG.A.P. GRASP](#) can give you a competitive advantage. The increasing dominance of large retailers in Spain as well as buyers that are using Spain as a trade hub for other European markets, will make social and sustainable certification a higher priority.

### Tips:

Anticipate stricter compliance with certifications in Spain and adopt several standards to ensure food safety and social responsibility. See the [Basket of Standards](#) of the Sustainability Initiative Fruit and Vegetables (SIFAV).

For other additional requirements, such as payment and delivery terms, see the [CBI buyer Requirements for fresh fruit and vegetables](#) and the [tips for doing business with European buyers](#).

## Taste is everything

In Spain, taste has a main focus, meaning fruit must have a good internal quality and high sugar content. The standards for taste and consumer experience are often higher in southern Europe, especially when it concerns fruit that is common in Spain, such as melons.

For consumers, it is normal to eat according to the season, because people know that fruit taste better within their local season. Imported fruit must have a good, sweet taste as consumers are prepared to pay more for the same quality they expect from local fruit: ripe and sweet. When the quality of the fruit is not good enough, the consumer does not buy or looks for other fruit in season.

## What are the requirements for niche markets?

### Premium fruit

Spain can be a good market for premium import products with superior taste, such as tree-ripened mangoes.

These products must be transported with efficient logistics and perfect handling. However, the added costs of airfreight make these products very expensive. Only a small consumer group is willing to pay the higher associated price, which makes it a niche market.

Not all premium or added value products are easy to market in Spain. For example, the concept of ready-to-eat (ripened in destination) is much more developed in northern Europe than in Spain. And the demand for organic fruit and vegetables, although being produced and exported by Spanish growers, is still underdeveloped.

**Tip:**

Invest in packaging and presentation when you want to export premium fruit to Spain. The taste and internal quality of your product is crucial and presentation will help communicate the superiority of your product.

## **2. Through what channels can you get fresh fruit and vegetables on the Spanish market?**

The Spanish fresh fruit and vegetables market offers a combination of traditional and new channels, from wholesale and local producer groups to purchase centres and mass distribution channels. This gives you options for entering the Spanish market.

### **How is the end market segmented?**

A large part of the Spanish fresh fruit and vegetable sector still maintains a traditional way of trade and commerce, however, supermarkets are the future.

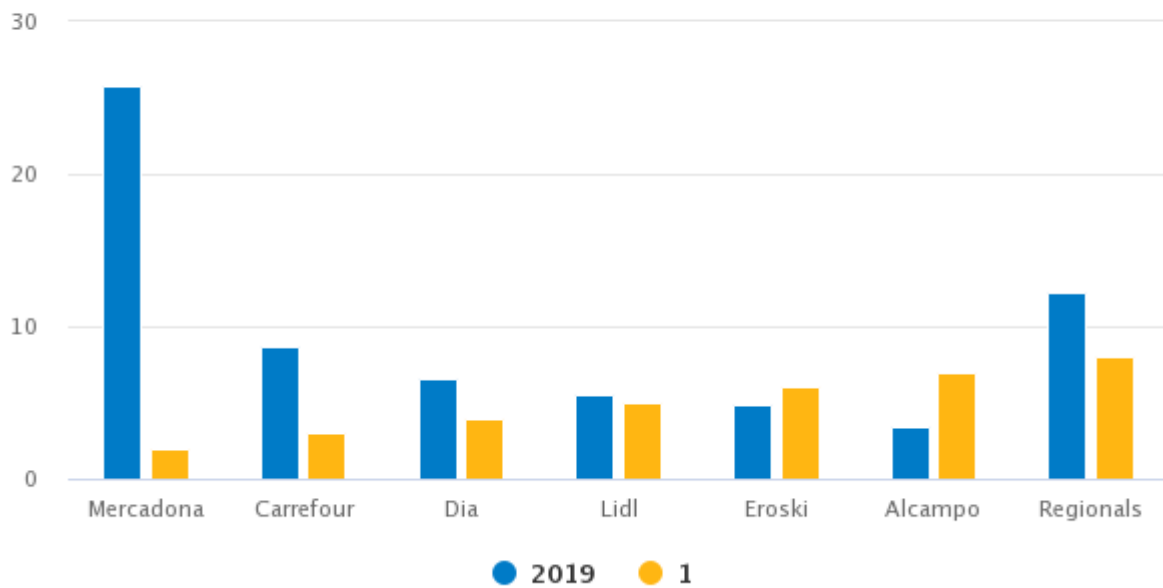
### **Supermarkets gaining ground**

The market share of supermarkets is growing. Especially the younger generations prefer the convenience of supermarkets when purchasing fresh fruit and vegetables. Mercadona is the leading supermarket in Spain with a market share of 25.8%. Together with Lidl, they have a growing market share in the Spanish food retail.

[Recent research](#) indicates that the cheapest fruit in Spain can be found in hypermarkets and supermarkets, while the most expensive fruit and best in flavour and appearance are presented at street markets. The retail chain Ahorramás in Madrid scored highest as the best place to buy fruit in Spain, followed by Aldi and MAS, although they are not among the supermarkets with the highest market share in Spain.

Figure 1: Market share of Spanish supermarkets

in %



Source: Kantar Worldpanel

## Specialised commerce

The traditional and specialised retail is still very important in Spain, although they are rapidly losing market share to the modern supermarkets. In 2018, the specialised outlets represented 33.4% of the fresh fruit commerce against the 51.8% combined market share of hypermarkets and supermarkets, which is somewhat recent, since only [a few years ago these figures still showed a predominance of traditional stores](#).

Figure 2: Market shares in the distribution of fresh fruit and vegetables in Spain 2018

in %

Source:

### Tip:

Find an overview of [retailers on Freshplaza](#) to get an idea of Spain's retail landscape and find the Spanish retail chains that are involved in the fruit and vegetable segment.

## Through what channels do fresh fruit and vegetables reach the end market?

### Central purchase centres

Spain is an important producing country and therefore a popular place for large buyer groups with regional sourcing activities. Several European retail chains have central purchasing centres in Spain, such as [Socomo](#) (part of the French Carrefour group), one of the leading buyers and exporters of Spanish fruit and vegetables. German companies are also present, including the Metro group with their Valencia Trading Office, Rewe with the [Eurogroup España](#) and Edeka with their Fruchtkontor España.

These purchase centres play a growing role in the international sourcing and distribution of fresh fruit and vegetables. They support supply programmes of European retail chains. Supermarkets in Spain do not always work with supply programmes. There are many suppliers they can choose from and sometimes prefer to work with quotations.

Table 1: Overview of the largest Spanish companies in the fresh fruit and vegetable sector

Company	Activities	Turnover
<a href="#">AMC Group</a>	Importer and processor	1131**
<a href="#">Grupo AN</a>	Sourcing company and distribution	766**
<a href="#">Socomo</a> - Sociedad de Compra Modernas (Carrefour)	Purchase centre	634
<a href="#">Anecoop</a>	Grower cooperation	574
<a href="#">Arc Eurobanan S.L.</a>	Importer and distributor	386
<a href="#">Sanlucar Fruit S.L.</a>	International trader	354
<a href="#">Edeka Fruchtkontor España</a>	Purchase centre	350**
<a href="#">Nufri group</a>	Producer and distributor	330
<a href="#">Eurogroup España</a> (Rewe)	Purchase centre	278**
<a href="#">Martinavarro S.L.</a>	Producer and distributor	236*

Greenyard Fresh Spain Sociedad Anónima	International sourcing	230*
La Unión S.A	Sourcing company and exporter	222*
Casi (Cooperativa Agraria y Ganadera San Isidro)	Grower cooperative	185*
Hermanos Fernández López S.A.	Importer and distributor	171*

\*based on turnover of 2016 \*\*includes activities in other sectors

Sources: [Alimentación en España 2018 - Consumo Alimentario](#) and [eComercio Agrario](#)

## Grower cooperation and local distributors

Many large fruit companies in Spain have a strong link with the production and the distribution of fresh fruit and vegetables on the Iberian Peninsula, meaning in Spain and Portugal. Cooperative structures have facilitated the development of large distributors of fresh fruit and vegetables, such as [Anecoop](#) and the Cooperativa Agraria y Ganadera San Isidro ([CASI](#)). The high level of organisation of cooperatives is a good way for Spanish growers to put their product on the market.

Although most growers and local distributors focus on national produce, there is a growing degree of integration between local production and foreign trade. This is partly to meet the demand in other markets which Spain supplies to. For example, the company [Martinavarro](#) combines their own cultivated citrus fruit from Spain with imported products.

## Independent importers and wholesale markets

Independent importers are more focused on sourcing from outside of Spain. They often import tropical fruit, such as bananas, pineapples and mangoes, or they combine the import of off-season fruit and vegetables with the purchase of local products. Spain is usually their most important market.

Some importing companies have grown into multinational operations, such as [Sanlucar](#), a Spanish company with sourcing and sales in different continents. Thanks to their presence in multiple production countries, they are close to the primary production and provide year-round supplies. As a producing exporter, you can explore the possibility of fitting into the structure of such an international player.

Spanish importers often fulfil an important wholesale function. They are important for spot sales and the supply of specialised segments, such as fruit and vegetables stores and local restaurants. Companies such as the [CMR Group](#) and [Cultivar](#) have their presence on different wholesale markets. CMR has a main focus on the specialised market channels. Cultivar is one of the first companies that introduced exotic products, reaching both specialised shops and some supermarkets.

The largest wholesale markets are Marcabarna in Barcelona and Mercamadrid in Madrid. For the Spanish production, the wholesale channel is still very relevant, especially for fruit and vegetables that are not suitable for supermarkets due to lack of certification or specific characteristics. The variety of tropical imported fruit and vegetables has also expanded over the years (see the trends in the Spanish market potential for fresh fruit and vegetables). Around 29% of Spain's wholesale fruit sales are tropical and exotic fruit, followed by 25% of citrus fruit.



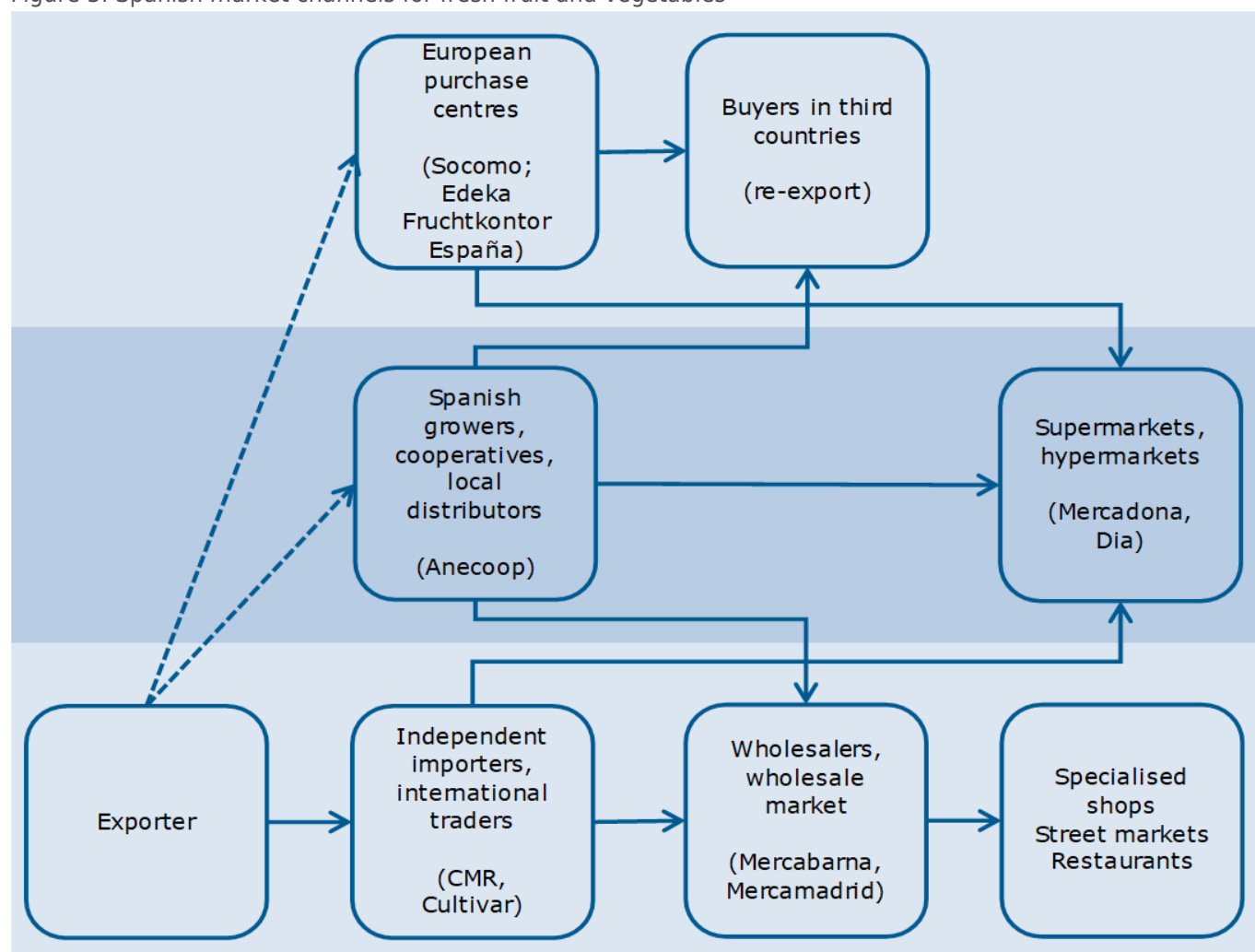
The sales of wholesale markets is still increasing, but importers expect this channel to become smaller in the long term because of the growing market share of supermarkets.

Table 2: Sales volume of fruit and vegetables and market share of the three largest wholesale markets in 2018, in tonnes and percentages

Mercamadrid	1,988,782	31,8%
Marcabarna	2,000,217	32,0%
Mercavalencia	267,527	4,30%
Total wholesale market	6,256,676	

Source: Mercasa – Informe anual 2018

Figure 3: Spanish market channels for fresh fruit and vegetables



### Tips:

Assess which channels suits your company best, but also determine what you have to offer. Differentiation is important, for example by specialising in specific products or varieties. In large distribution channels, volume and supply reliability can be important. And when aiming for co-

production, your supply window must not compete with the Spanish season.

Read also the CBI's [tips for doing business with European buyers](#).

## What is the most interesting channel for you?

Spain's import and export channels are not always well integrated. Export companies are mainly focused on the distribution of Spanish fruit and vegetables, while import is often a separate business that mainly supplies the Spanish market with tropical and off-season products. However, the traditional supply chains are slowly changing and you can find potential opportunities in new and old channels, including importers, purchase centres and farmer groups.

### Importers with international networks

The most common channel for foreign suppliers are Spanish importers of fresh fruit and vegetables that have the necessary international experience and network. These companies include [Sanlucar](#), [Hermanos Fernández López S.A.](#), [CMR Group](#), [Bargosa](#) and [Cultivar](#). The trade often takes place on the basis of consignment (including pre-payment and cost paid) with an active exchange of market information.

### Purchase centres for large distribution

The supply chain for the large distribution of fresh fruit and vegetables in Spain is developing and you can expect to find new opportunities with international purchase centres. For example, [Socomo](#) (Carrefour) and the Valencia Trade Office of the Metro Group do not only source fruit from Spanish growers, but also import fresh products from all over the world. These groups organise the purchasing for cash & carry and retail chains that often have stricter supply conditions and product requirements than the Spanish wholesale segment. For large foreign producers that can handle large volumes and certified supply, these purchase centres can become important strategic alliances.

### Joint ventures with local farm groups

A channel that is less common in Spain, but with increasing potential, are large growing companies, cooperatives and distributors that are traditionally selling Spanish products. The fresh industry in Europe is becoming more integrated, and Spain is no exception. As a foreign supplier, try to join forces with Spanish producers and organise a year-round supply of fresh products. This makes most sense for products that are also typically produced in Spain and that have interesting gaps in the supply or an off-season demand.

#### Tips:

Visit the [Fruit Attraction](#) trade fair to find potential partners in the Spanish fresh fruit and vegetables sector.

Browse the member lists of producer and exporter associations to find companies that match your export strategy for Spain. You can find different associations through the umbrella organisation [Fepex](#), the Spanish federation of associations of producers and exporters of fruits, vegetables, flowers and live plants.

Check out the [Mercabarna](#) and [Mercamadrid](#) wholesale markets when you visit Spain to get an impression of the companies and types of products that are sold. Their websites and [associations](#) also lists companies.

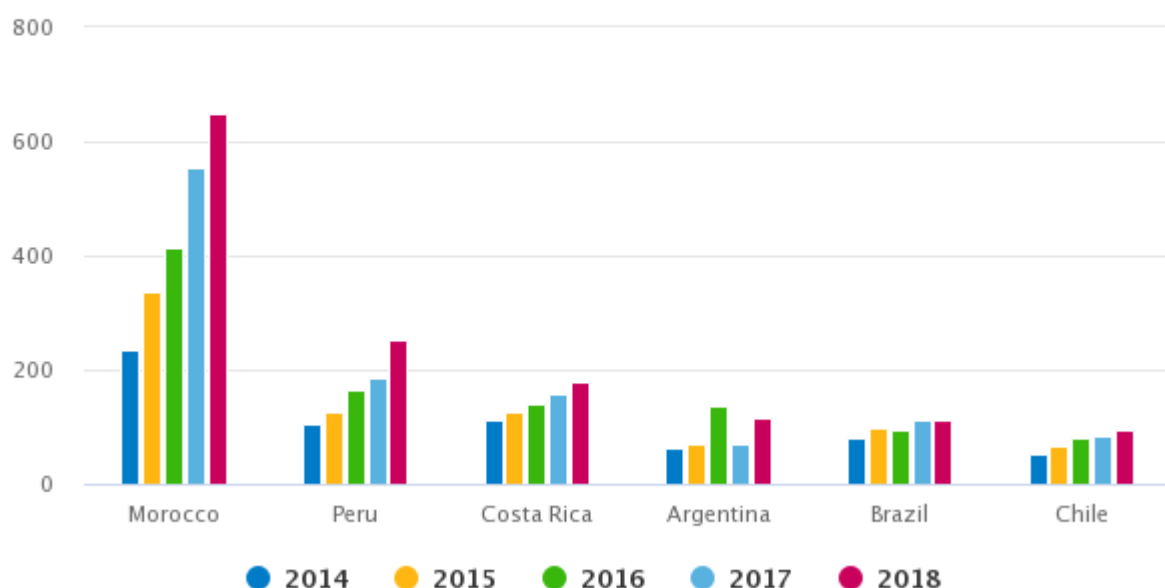
### 3. What is the competition like in the Spanish market for fresh fruit and vegetables?

Most of Spain's fresh fruit and vegetable imports originate from nearby Morocco or from Latin America. Most of its larger suppliers are specialised in specific fruit categories, such as berries from Morocco, lemons from Argentina and bananas and pineapples from Costa Rica. The limited number of origin countries for certain fruits creates opportunities for companies from new supplying countries that can compete with the dominant players. But also specialisation in products with a less defined origin can be a good strategy.

#### Where are your competitors located?

Figure 4: Main non-European supplying countries to Spain

in € million



Source: ITC Trademap

#### Morocco: competitive, nearby berry supplier

Morocco is the largest and one of the fastest growing suppliers of fresh fruit and vegetables to Spain. Morocco has the advantage of being geographically close to the Spanish market, but also offers a cost-efficient supply and often enters the season earlier than the locally produced fruit and vegetables.

Large part of the increased sourcing in Morocco can be attributed to the booming demand for berries, mainly raspberries and blueberries. Spanish import value of fresh berries went up from €37 million in 2014 to €221 million in 2018. Being close to Spain, Morocco can also be competitive in vegetables, especially in beans, peppers and tomatoes. The reason for this is that vegetables are more common for local or regional production, whose product value is often low and the climate allows for extensive cultivation.

Morocco's [Green Plan](#), a project introduced in 2008, has supported the agricultural sector by encouraging private investments, and developing Moroccan agricultural exports. This has increased the competitive position of Morocco in exports to Spain.

The modernisation of Morocco's agricultural sector has led to added value farming and high productivity, which has attracted Spanish companies looking for sourcing opportunities in Morocco. For example, the [Spanish company Fresh Royal owns blueberry plantations](#) in Morocco. This integration of Spanish and Moroccan production makes it more difficult for other suppliers near Spain to compete.

## **Peru: increased volumes**

Spain and Peru share a language but they also share many of the same cultivated fruits, such as avocados, mangoes, blueberries, mandarins and grapes. The main reason for the fast growing supply from Peru, is the enormous production volume that Peru has developed over the years.

Peru is the largest supplier to Spain in avocados and recently also in grapes, surpassing Chile in 2018. In blueberries and mangoes, Peru is the second-largest supplier after respectively Morocco and Brazil. In vegetables, Peru is the first supplier of asparagus to Spain.

The strengths of Peruvian suppliers are their large counter seasonal supply, which does not much compete with the Spanish production. They have a relatively well-organised supply of a large volume of fruit and vegetables. The large volume is also a threat for Peruvian and other exporters in a similar season; the production volume has increased so fast that it can flood the European markets, including Spain, and push prices down.

## **Costa Rica: dominant supplier of pineapples and bananas**

Costa Rica is the third-largest supplier of fresh fruit and vegetables to Spain, but it almost exclusively competes in pineapples and bananas — the main produced fruit in Costa Rica. In pineapples, Costa Rica dominates the European market, including Spain with 158 thousand tonnes in 2018, which was almost 90% of Spain's total pineapple imports. Costa Rica is also Spain's main foreign supplier of bananas (126 thousand tonnes in 2018), exceeding the volumes from Colombia, Ecuador and Ivory Coast (22 to 64 thousand tonnes), and cassava (7 thousand tonnes in 2018). However, Spain's own banana production (391 thousand tonnes) on the [Canary Islands provides most of the bananas on the Spanish market](#).

The success of Costa Rica in pineapples and bananas is strongly related to multinationals, such as Del Monte. These multinationals have large resources to build a reputation in Spain.

In other fruit and vegetable categories, Costa Rica is a minor supplier. Their third-largest fruit exported to Spain is watermelon, which only accounted for 689 tonnes in 2018. With an already well-organised supply chain of fresh fruit to Spain, Costa Rica is well positioned to develop its export further and compete with suppliers from other countries.

## **Argentina: experienced lemon supplier**

Argentina has an ideal geographical position to export counter seasonal fruit to complement Spanish growers. Citrus fruit, mostly lemons and oranges, is by far the most popular fruit from Argentina, although with some major fluctuations. Like Spain, Argentina is one of the largest lemon producers in the world with extensive experience. But facing the competition of Spanish growers, the demand for Argentinian supply increases mainly during a short supply window or when there are issues with the Spanish season.

Argentina also competes in blueberries, although Argentine blueberry exports have not grown as much as Morocco's and Peru's and volumes to Spain have stabilised around 600 tonnes annually.

Exporters from Argentina are specialised in a few fresh products, and they are likely to specialise further, for example, in specific varieties or organic production. It will be interesting to see which strategy Argentinian growers will choose to continue competing with fast developing suppliers, such as Peru, which also has a strong trade relation with Spain.

## **Brazil**

Brazil has relatively stable exports of fresh fruit and vegetables to Spain, mainly supplying melons, mangoes, papayas and limes. In melons and papayas, Brazil is Spain's principal supplier. The melon supply window is more convenient than that of Morocco. In papayas, Brazil is practically the sole supplier. In mangoes, Brazil is also the leader in volume, but the export value to Spain is similar to that of Peru, which can be attributed to

differences in varieties.

The strength of Brazil is the size of their internal market. They do not depend on export markets as much as many other countries, so Brazilian producers can fall back on their internal demand and maintain a level of flexibility, which shows the importance of diversifying your end markets.

## Chile

Chile has a diversified supply of fruits to Spain, which includes apples, grapes, kiwis and avocados, among others. Chilean growers are experienced and well organised in the production of fresh fruit. Their main disadvantage is the distance to the Spanish market, which makes them not only slower, but also raises their shipping costs and affects fruit shelf life.

### Tips:

Compare prices, logistical distance and product varieties with the countries above. Look for information of national producer organisations and tariffs of shipping lines. Use this to make a short analysis of your competitive advantage.

Specialise in fruit and vegetables that are not yet part of large and defined supply chains, even more so when you lack a competitive advantage or volume. For example, common bananas, pineapple and lemons will take much more effort in differentiation.

## Which companies are you competing with?

Companies that export successfully to Spain are often producers from Latin America that are well organised and specialised in a few key products. The best way to prepare for doing business with Spain is to compare yourself with these companies and make Spanish one of your trade languages.

### Navarro Fruits

One of the companies in Peru that supplies to Eurogroup España (of Rewe) is [Navarro Fruits](#). This company is relatively young (2006) but capital investments in farmland have made it able to specialise in mangoes and grapes, including organic production.

The presentation of the company has a clear direction towards social responsibility and good agricultural practices, and the company is involved in several social initiatives. These characteristics contribute to the success of this company, especially when supplying purchase centres with German roots.

### Copefruit

[Copefruit](#) started out as a grower cooperative in Chile and turned into a profitable organisation with more than 300 producers. As a result, the company has always maintained a strong focus on the agricultural side, supplying knowledge and agrochemical products to their associated growers. They own several processing and packing plants, which helps them bring a variety of fruit to the market, including cherries, apples, blueberries, kiwis, pears, plums, nectarines and peaches.

Because of its size and direct connection to cultivation, the company makes a good impression on buyers in Europe. Copefruit is also active in Spain, working with buyers such as Socomo (Carrefour) and Cultivar.

## Tips:

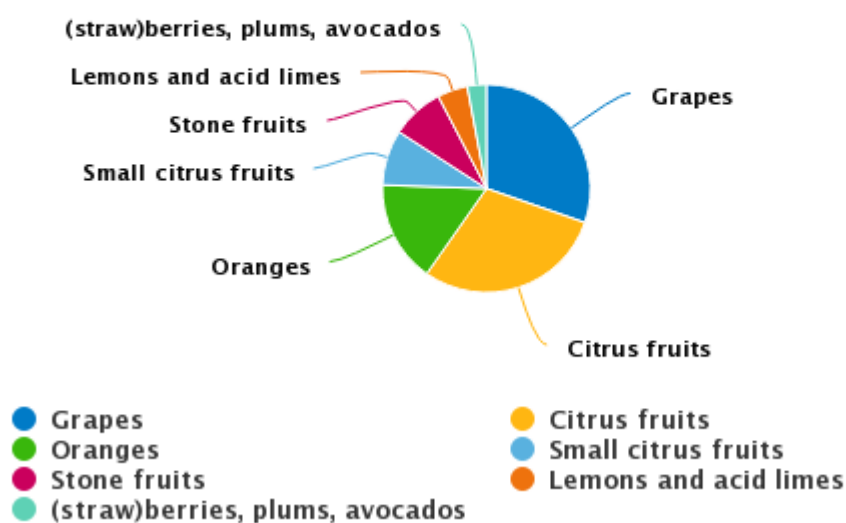
Increase your participation in the production of your products to show your direct connection with farmers. Producing exporters with control over their production have the preference of many buyers in Spain, just like in the rest of Europe.

Look at the online presentation of the above companies and try to present the unique strengths of your company in a modern way. It will be an advantage to have a professional online profile.

## Which products are you competing with?

On product per se, your strongest competition will come from Spanish produce. Local fruit has the preference of many consumers in Spain. For example, when Spanish consumers can choose between imported mandarins and sweet Spanish peaches, they will invariably choose the latter and the mandarins will not sell. For these consumers, there is a strong perception of quality difference in taste, healthiness and freshness. The other reason is economical. In-season fruit and vegetables are almost always lower in price (see table 3).

**Figure 5: Volume of different fruit produced in Spain in 2018**  
in 1.000 tonnes



Source: Eurostat

Table 3: Indicative supply calendar for different Spanish fresh products

	j	f	m	a	m	j	j	a	s	o	n	d
avocado												
raspberries												
blueberries												
plums												
watermelon												
grapes												
mango												
pomegranate												
lemon												
mandarin												
orange												

### Tip:

Try to focus as much as possible on the off-season demand or on the edges of the local supply season. Also take the Spanish season and supply windows into account when selecting, for example, early or late varieties.

## 4. What are the prices for fresh fruit and vegetables on the Spanish market?

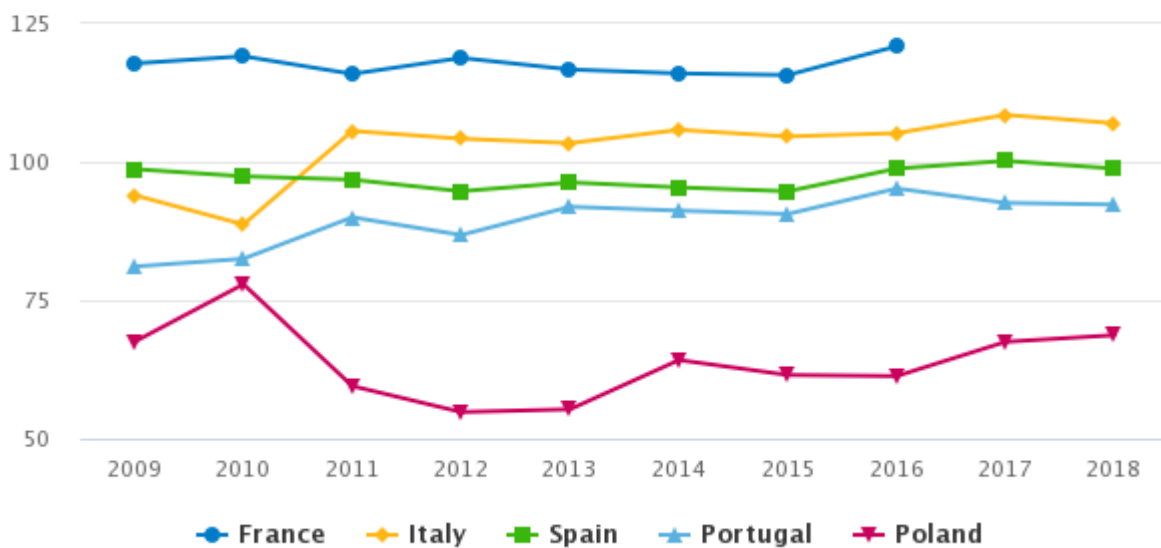
Prices of fruit, vegetables and potatoes in Spain is relatively stable and close to the average European prices. Most of the larger destination markets such as Germany, France and Italy have higher prices than Spain. Portugal and Poland have lower prices than Spain.

Prices of fresh fruit and vegetables are likely to remain relatively stable in Spain. The organisation of new, large distribution centres will contribute to efficiency in the supply chain, thus reducing prices, but the increasing requirements of large retail chains and the higher import of tropical fruit and vegetables will increase average prices.

The annual results of the Spanish yields remain a significant influence on the weekly prices of fruit and vegetables, not only in Spain, but also in the rest of Europe. In full season, prices generally go down due to the large availability.

**Figure 6: Price level indices for fruits, vegetables and potatoes**

(EU28= 100)



Source: Eurostat

Table 4: Example of market prices in Spain, in euros per kilo

	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019
Avocados	1,73-2,12	2,20-2,90	2,19-3,15	2,75-3,15	2,41-2,65
Oranges	0,37-0,48	0,39-0,57	0,41-0,56		
Mandarins	0,65-0,94	0,60-1,05	0,69-1,05	0,64-1,17	0,77-1,00
	2015	2016	2017	2018	2019
Lemons	0,60-1,54	1,06-1,97	0,89-1,32	0,96-1,62	0,89-1,07
Watermelon	0,23-0,47	0,15-0,39	0,16-0,30		

Source: European Commission - EU market prices for representative products


### Tip:

Check the European price history of representative products in the [market observatory for fruit and vegetables of the European Commission](#).




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