A brief portrait of the Spanish Organic Farming market.
Elements for a strategy

12 Séminaire International d'information et de réflexion su l'agriculture biologique

Paris, 28 February 2017

Francisco Javier Maté Caballero

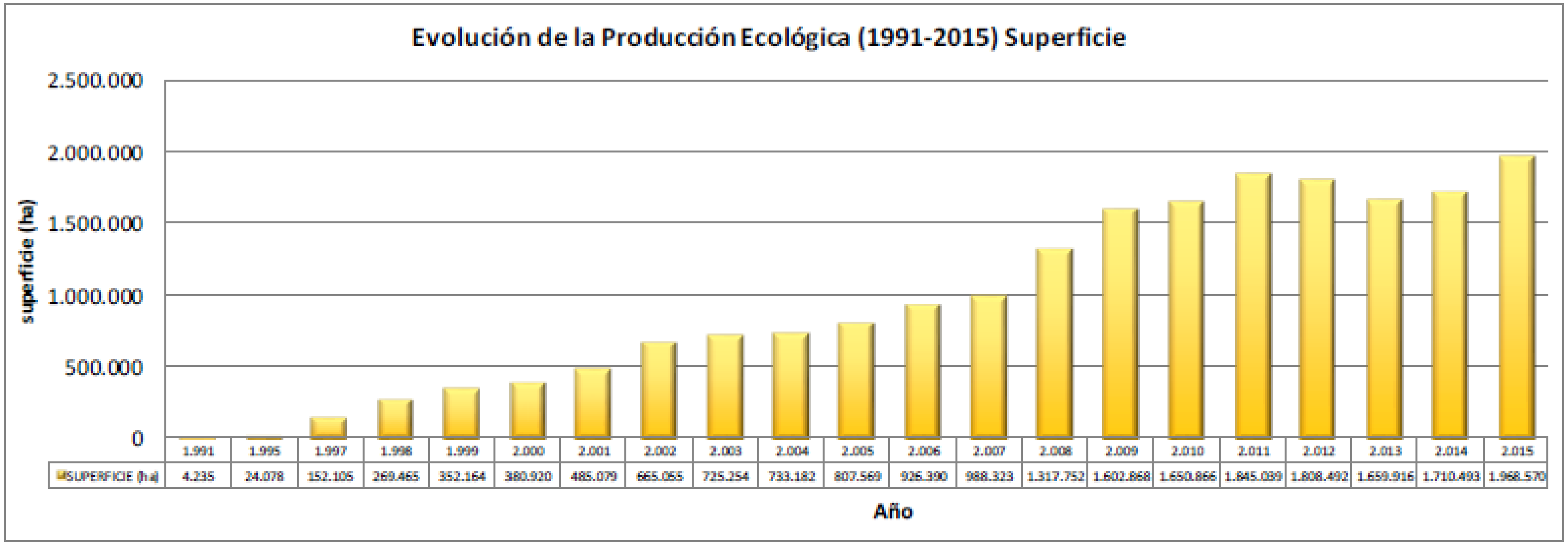
Subdirector General de Calidad Diferenciada y Agricultura Ecológica (SGCDAE)

Dirección General de la Industria Alimentaria (DGIA)

Secretaría General de Agricultura y Alimentación (SGAA)

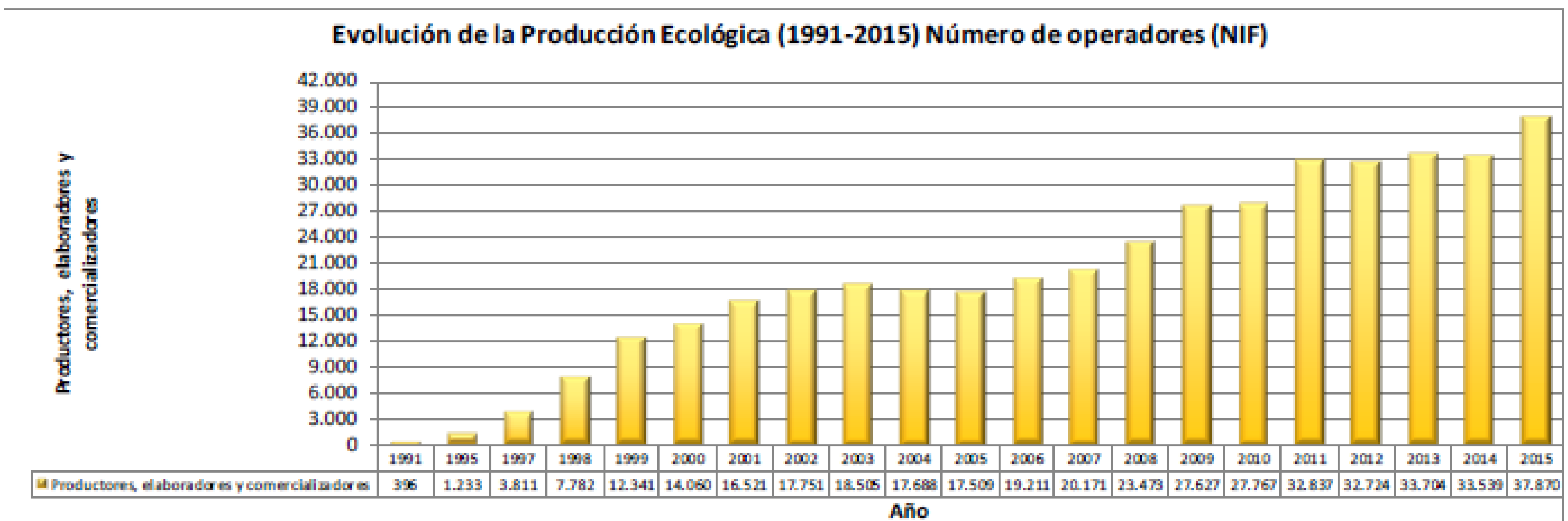
Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente (MAPAMA)

SPANISH ORGANIC FARMING EVOLUTION. SURFACE AND OPERATORS.



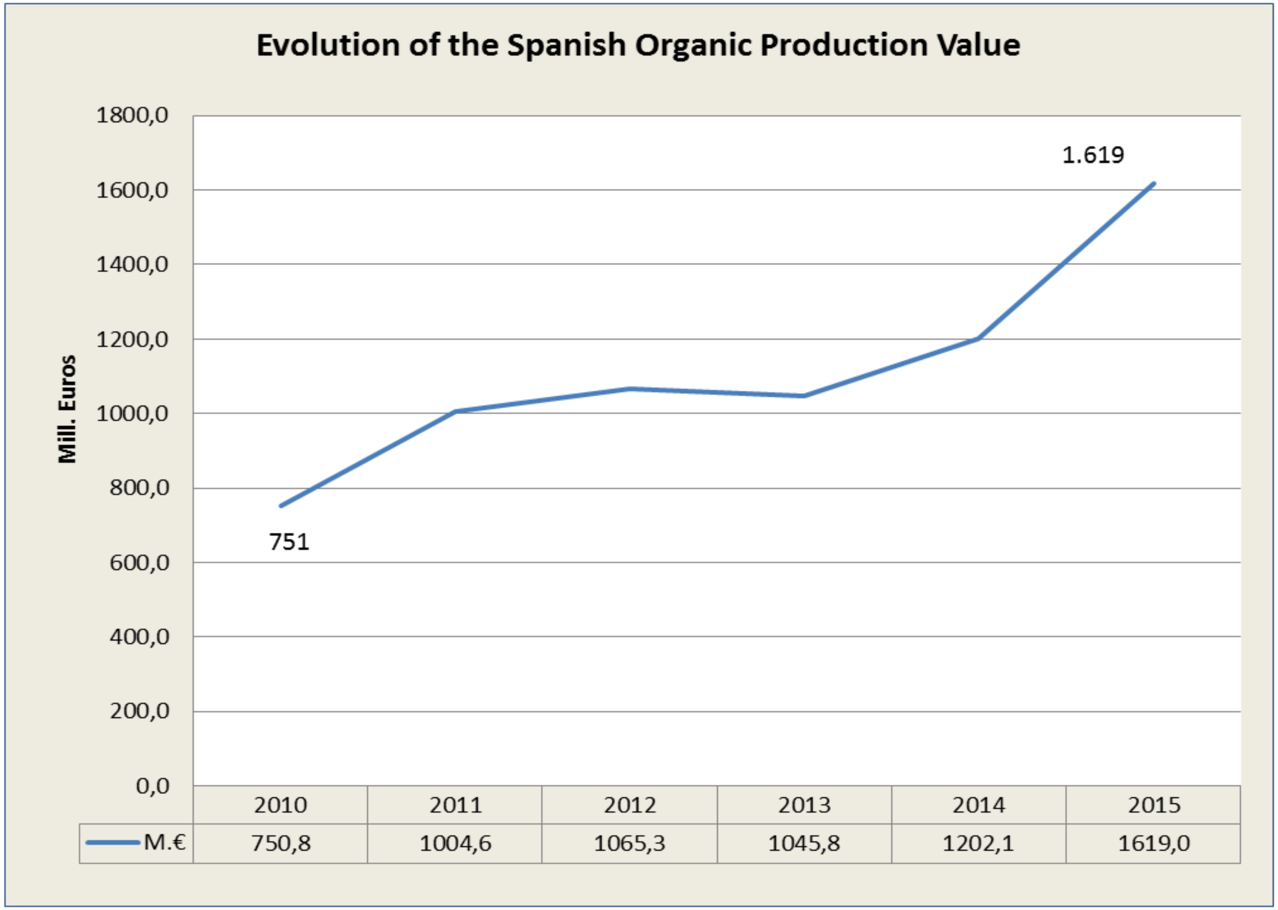
In ten years the surface and operators have doubled. Now it has near 8% of total Useful Agricultural Land of Spain, and we are the 1st of UE and 5th of world.

But 77% are in the South (Andalucia, Castilla-La Mancha, Extremadura and Murcia)



GOBIERNO DE ESPAÑA | MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

SPANISH ORGANIC PRODUCTION VALUE (AT SOURCE)



In 2015 we have 5.825 Food Industry in Orgacnic Sector, +75% in 5 years, (41% in the world now more than 65.000 Millions €/year).
Spain is the 4th of UE and 5th of the world

In 5 years we increase production value more than the double

ORGANIC PRODUCTION VALUE (AT SOURCE) IN 2015: 1.619 Million euros (35% more than 2014)

GOBIERNO DE ESPAÑA | MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

SPECIFIC WEIGHT OF THE ORGANIC PLANT ORIGIN PRODUCTION VERSUS ORGANIC ANIMAL ORIGIN PRODUCTION

EVOLUTION OF THE SPECIFIC WEIGHT OF THE ORGANIC PRODUCTION OF PLAN AND ANIMAL ORIGIN

% of the organic production value at source	2015	2014	2013	2015/2013 (%)
Plant Origin	83,9%	82,4%	86,7%	-3,2%
Animal Origin	16,1%	17,6%	13,3%	+21%
TOTAL VALUE	100,0%	100,0%	100,0%	

7.553 animal origin units

GREAT ASYMMETRY IN FAVOR OF PLANT ORIGIN PRODUCTION.

GOBIERNO DE ESPAÑA
MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

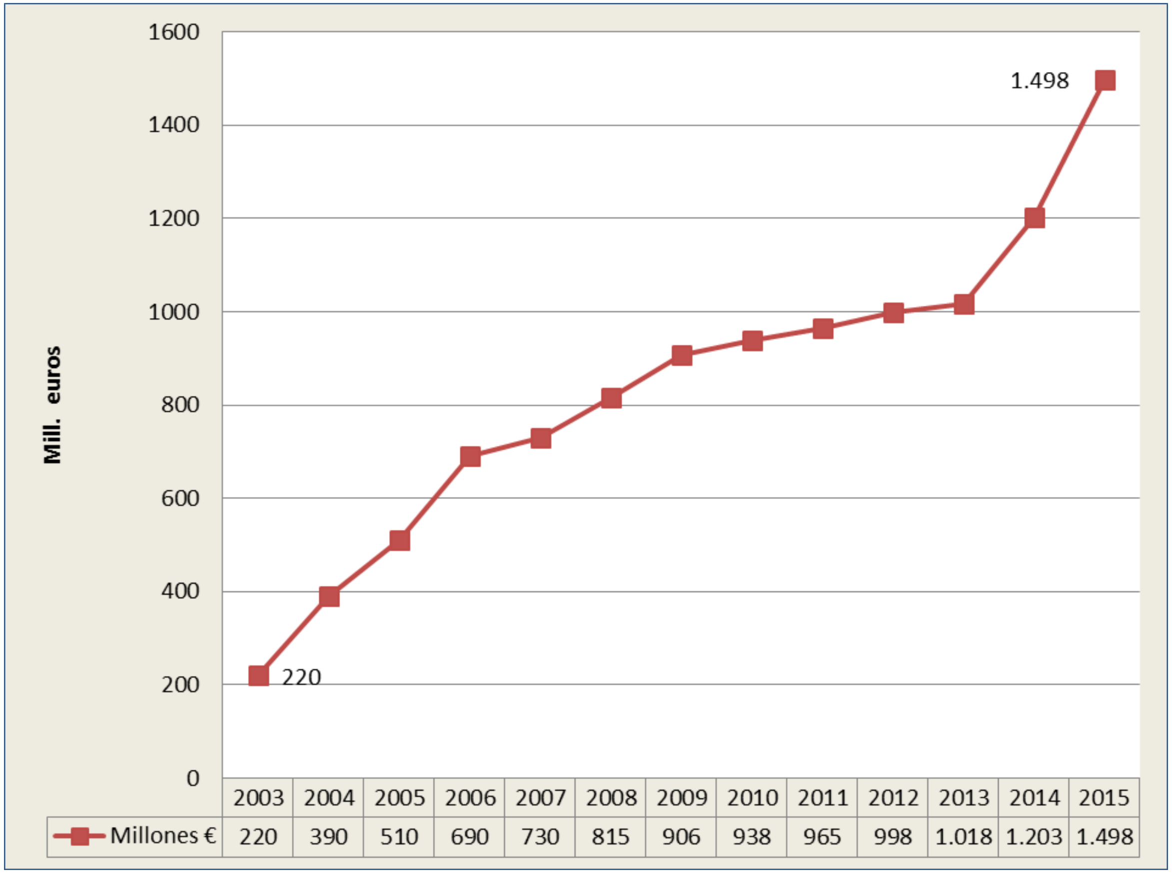
ECONOMIC VALUE OF THE MAIN ORGANIC PRODUCTIONS (2015)

ECONOMIC VALUE OF THE MAIN ORGANIC PRODUCTIONS (2015)

Products lines (% vs total sector production)	Production value at source 2015 (Mill €)	% Total value production at source
1. Olive Oil (10,8%)	442,9	27,4%
2. Fresh vegetables and potatoes (2,4%)	226,7	14,0%
3. Meat and meat products (0,6%)	206,8	12,8%
4. Wine (8,6%)	198,6	12,3%
5. Fruits, except nuts (2,4%)	169,1	10,4%
6. Nuts (14,4%)	105,0	6,5%
7. Cereals	53,9	3,3%
8. Pulses (3,3%)	21,7	1,3%
9. Raw mil (all species)	17,7	1,1%
10. Aquiculture	16,3	1,0%
11. Fodder	15,6	1,0%
12. Eggs (0,5%)	13,3	0,8%
13. Industrial crops	5,4	0,3%
14. Honey (2,7%)	3,7	0,2%
15. Other products of plant and animal origin	122,3	7,6%
TOTAL PRODUCTION AT SOURCE VALUE 2015	**1.619,0**	**100,0%**

GOBIERNO DE ESPAÑA
MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

EVOLUTION OF ORGANIC FOOD CONSUMPTION IN THE INTERNAL MARKET



Spain is the 10th country of organic consumption and 6th of UE

ORGANIC FOOD SPANISH CONSUMPTION(2015): 1.498 Mill. Euro (24,5% increase and 18,2% 2014 vs 2013)

Conventional foods consumption increase +1% in 2015

GOBIERNO DE ESPAÑA
MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

ORGANIC FOOD *per capita* CONSUMPTION IN SPAIN

Evolution of per capita consumption of organic food (shopping basket of households and on-premises channel included)

Year	per capita consumtion of organic food (€/inhabitant/year)	per capita consumtion of non organic food (€/inhabitant/year)
2011	20,61	2.178,4
2012	21,34	2.152,6
2013	21,85	2.173,2
2014	25,89	2.110,5
2015	32,27	2.133,5
Δ/∇ 2015/2011 (%)	**56,6%**	**-2,1%**

Germany 97€
France 73€
Italy 38€
UK 36€
Sweden 145€

% ORGANIC PROD./NON ORGANIC PROD. (2015): 1,51%

GOBIERNO DE ESPAÑA | MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

COMPOSITION OF THE ORGANIC SHOPPING BASKET

Composition of the shopping basket in organic and non organic food.

Products lines	Specific weight in value of the composition of the shopping basket	
	Organic food	Non organic food
1. Vegetables, potatoes and their processed products	16,0%	11,4%
2. Fresh fruit and their processed products	15,0%	9,5%
3. Cereals (including rice) and cereal products (bread, pasta, etc)	12,6%	10,7%
4. Meat and meat products	10,0%	21,8%
5. Wines, biers and other beverages	9,0%	3,1%
6. Oils and fats	8,8%	2,2%
7. Nuts and nuts products	4,0%	1,4%
8. Milk and milk products	4,0%	12,4%
9. Pulses and preserved pulses	2,0%	0,3%
10. Eggs and eggs products	1,3%	1,2%
11. Aquaculture and preserved fishPesca y acuicultura y sus conservas	1,2%	13,4%
12. Honey and honey products	1,0%	0,5%
13. Other products of plant origin	13,5%	7,4%
14. Other products of animal origin	1,6%	4,6%
TOTAL	**100,0%**	**99,9%**

Fresh 65% and Procesed foods 35%

SALES OF ORGANIC FOODS. SEGMENTATION BY CHANNELS

Sales of organic products. Segmentation by channels		
	Market shares (%)	
	Ranges	
TOTAL DISTRIBUTION	**100%**	
SPECIALIST CHANNEL	**63%**	**73%**
Organic supermarket Organic traditional shop	40%	45%
Organic food consumption groups	14%	16%
Organic food direct marketing/ on-line	7%	9%
Organic on-premises channel	2%	3%
NON ORGANIC CHANNEL	**27%**	**37%**
Non organic hypermarket	14%	18%
Discount	4%	7%
Non organic supermarket	7%	8%
Non organic traditional shop	2%	4%

Increasing in Hyper and Discount non organic.
Not in supermarket (Mercadona)

THE ORGANIC FOOD DISTRIBUTION MODEL IN SPAIN IS SLIGHTLY DIFFERENT FROM OTHERS: SIGNIFICATIVE PRESENCE IN SPECIALIST CHANNEL

Only in 20% of shops the citicens can buy organic food products

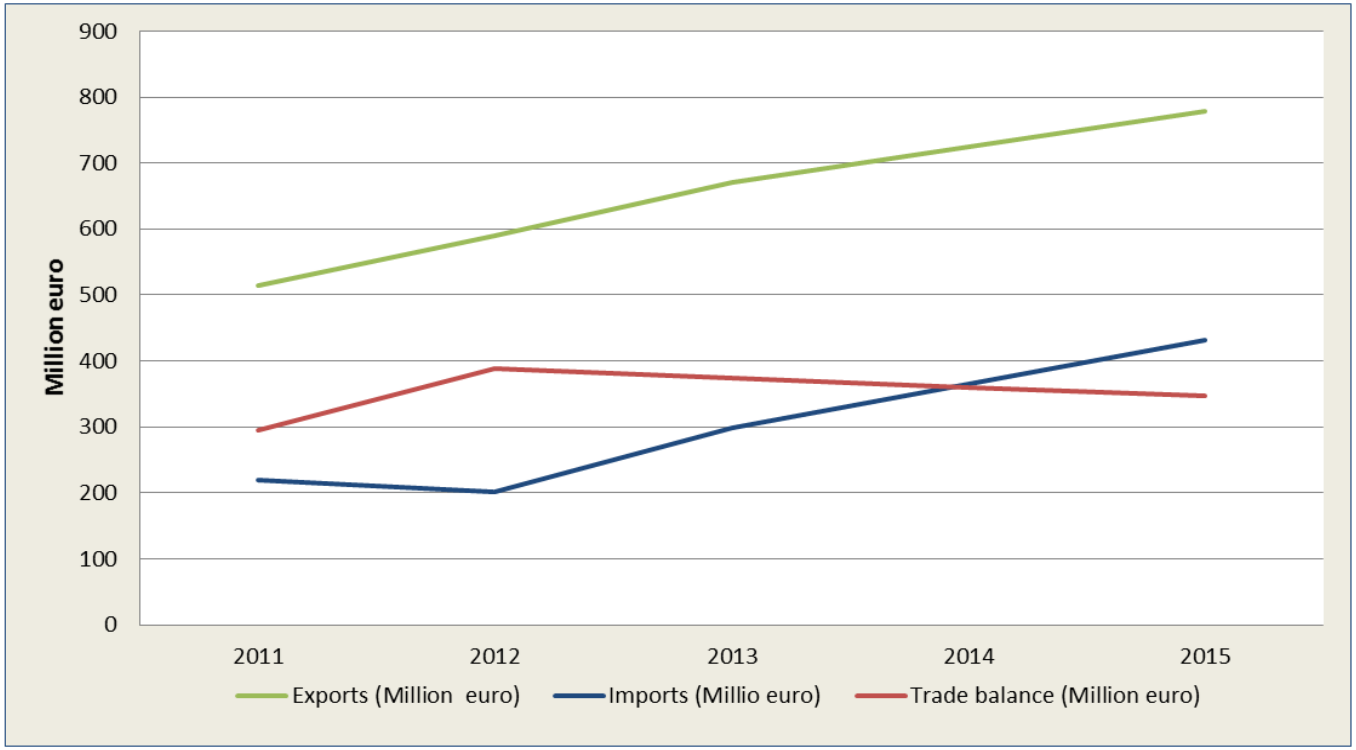
EVOLUTION OF ORGANIC FOOD FOREIGN TRADE

Evolution of the Spanish organic food foreign trade

Year	Exports (Million euro)	Imports (Millio euro)	Trade balance (Million euro)	Percentage cover import/export
2011	514,5	219,0	295,5	234,9%
2012	590,0	201,0	389,0	293,5%
2013	671,5	298,0	373,5	225,3%
2014	724,0	365,0	359,0	198,4%
2015	778,0	431,0	347,0	180,5%

Total Spain agrifood exports in 2015 was 44.065 M€. (organic agrifood was 1,8%)

Export increasing 51% en 5 years (Total Spain agrifood export increasing 29%)



Spain is the 4th world export country of organic foods and 3rd of UE after Italy and Netherland. The main goods are Olive oil (1st), Wine (1st), Fruits, Vegetables and Pulses.

GOBIERNO DE ESPAÑA
MINISTERIO DE AGRICULTURA Y PESCA, ALIMENTACIÓN Y MEDIO AMBIENTE

STRUCTURE OF ORGANIC FOOD FOREIGN TRADE

Organic food export structure

Products lines	% sobre el total de exportaciones	
1. Wine, bier,cider and other alcoholic drinks	22%	95%
2. fruits and fruits products (nuts included)	22%	
3. Fresh vegetables, potatoes, pulses and derivates.	22%	
4. Olive oil	20%	
5. Other products of plant origin (cereals included)	9%	
6. Meat and meat products	3%	5%
7. Other products animal origin	2%	
TOTAL	**100%**	**100%**

Destinations : 90%UE, 10% TTCC

Organic food import structure

Cereals and feed

Products lines	% /Total Imports (aprox.)
Cereals products and soya products (drinks, pasta, flour,sauces,rice, soups, condiments, seeds, spices, etc)	25 - 30%
Seasonal fruits and vegetables, tropical/exotic fruit (and derivates and jams)	5 - 10%
Baby foods, dietary products, nutraceutics and energy drinks	15 - 20%
Dairy products and dairy drinks	5 - 8%
Prepared dishes, special preserves, snacks, etc	5 - 8%
Coffee and tea, infusions, cocoa-derived products, confectionery and sweeteners	10 - 15%
Other organic products of plant and animal origin	1 - 5%
Animal feed, and bulk and raw materials for use in organic holdings and industries	20 - 25%
TOTAL	**100%**

Strategic lines 2014-2017:

1. Support for the consolidation of ecological production
2. Promotion of domestic consumption and marketing
3. Boosting the sectorial structure and professionalization

Thank you
Merci beaucoup

mapama.gob.es