



The agrarian and fisheries sector in Andalusia



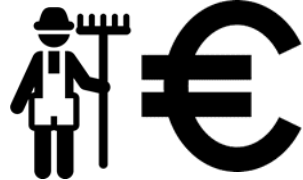
Member State: Spain

Area: 87,597 km² (17% of the Spanish area, 2% of the EU28 area)

Population: 8,405,000 people
(18.0% of the Spanish population and 1.6% of the EU28 total population)



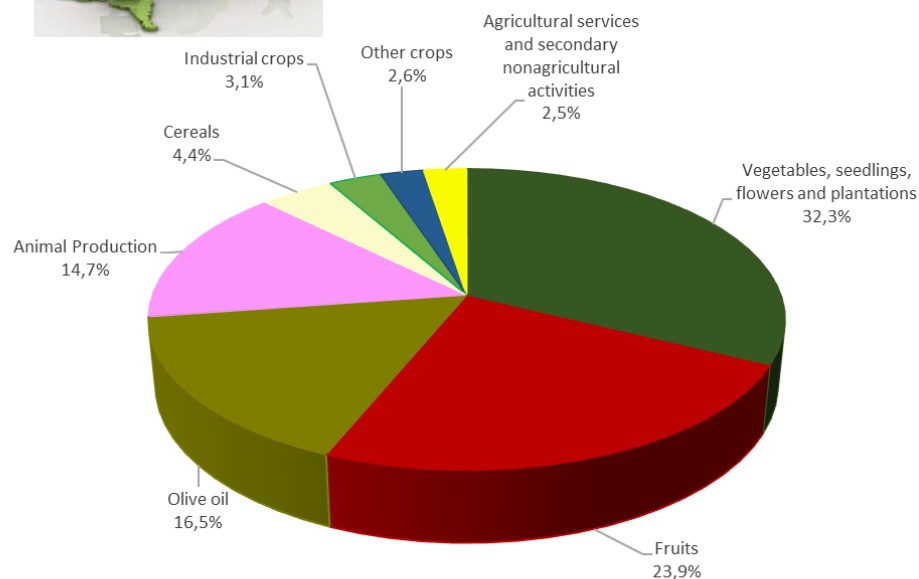
**37% rural
population**



Socio-economic context

Production of the Agricultural Sector (PAS)

In 2018, represented 24.8% of the PAS of Spain and 3.0% of the EU28



Population working in the agricultural sector

In Andalusia: 8.3%

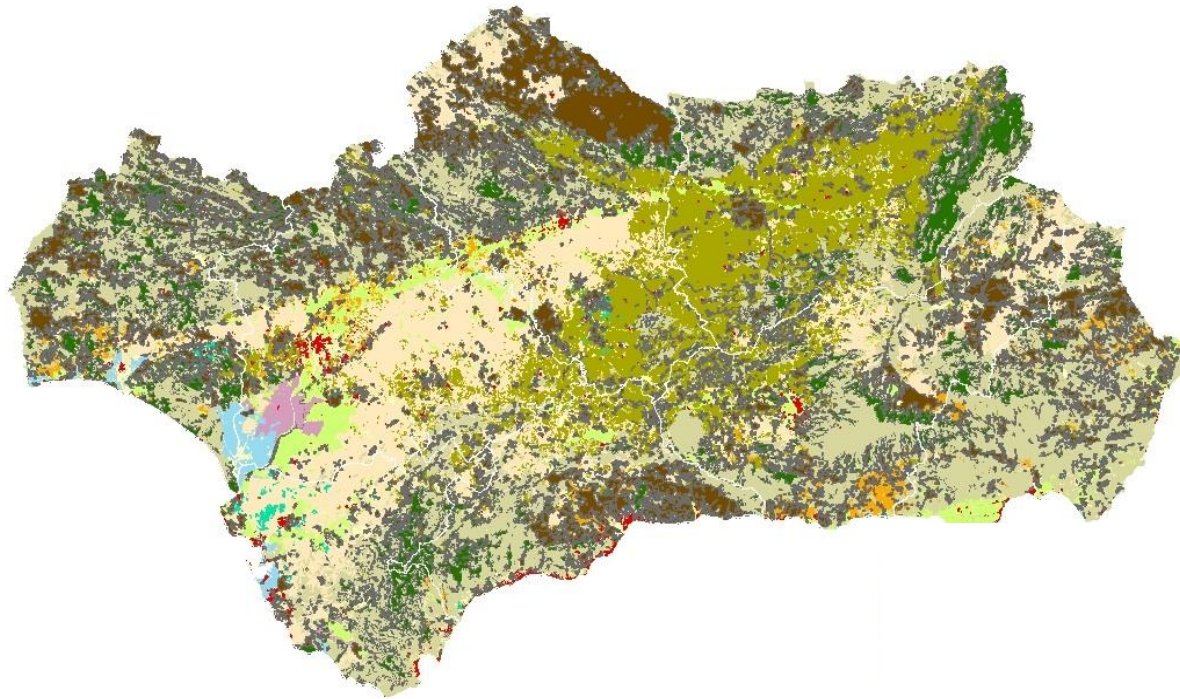
In Spain: 4.2%

In UE28: 4.0%



Agricultural activities are the main source of employment in half of Andalusian municipalities





Map legend

- Heterogeneous agricultural
- Fruit trees
- Rice fields
- Vineyards
- Bushes and the scrubland
- Pastures
- Forests
- Irrigated crops
- Rainfed crops
- Olive groves
- Wet areas
- Urban areas
- Others

Source: Compilation based on cartographic information of the IECA (CAGPDS) for 2014.

Arable land: 35.0%
Grazing land: 25.3%
Other: 39.7%

Andalusian UAA
4.4 Mha



50.2% of the total Andalusian area

Source: 2016 Farms Structure Survey. Spanish National Statistics Institute.

A very diverse agriculture that....

Dehesa



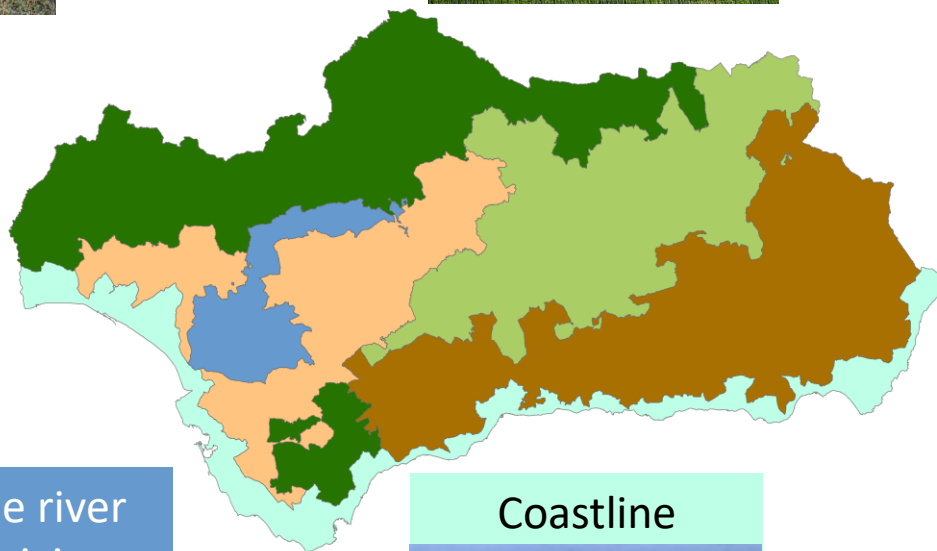
Las Campiñas



Olive growing



Andalusian farming systems



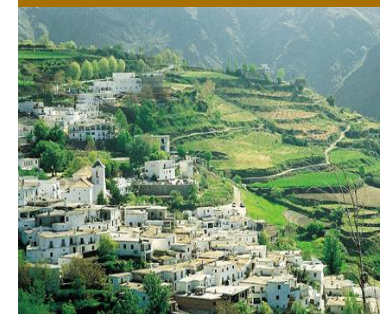
Valley of the river Guadalquivir



Coastline



Sierras Béticas



...plays an important role in our landscapes

A very diverse agriculture: Dehesa



A very diverse agriculture: Las Campiñas



A very diverse agriculture: Olive growing



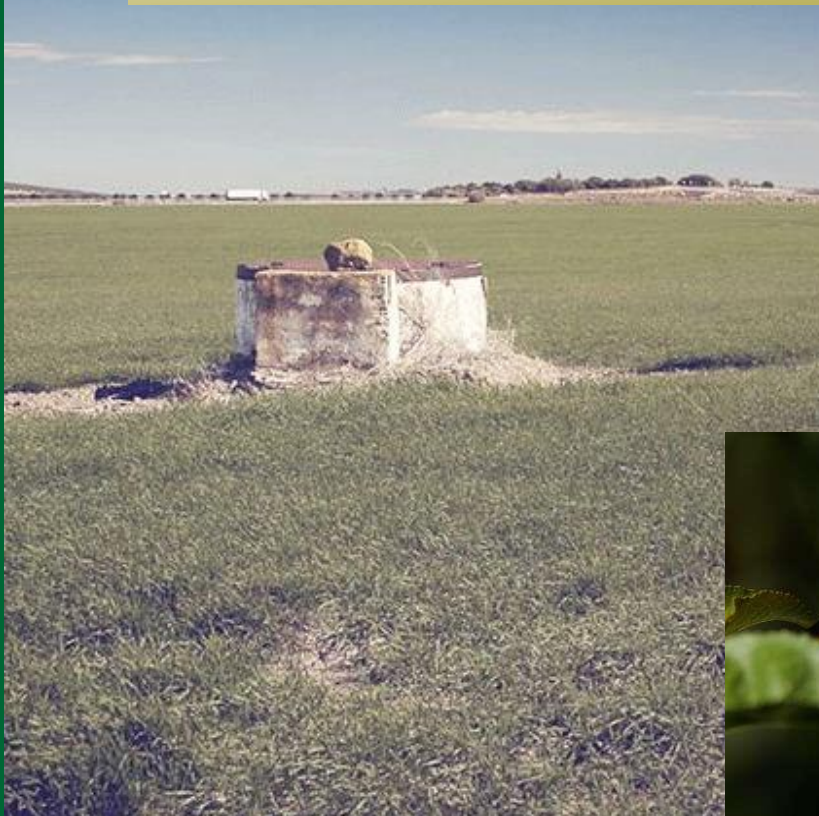
A very diverse agriculture: Sierras Béticas



A very diverse agriculture: Coastline



A very diverse agriculture: Valley of the river Guadalquivir





Olive growing

- 1.5 million hectares
- 30% of the Andalusian agrarian area
- 60% of the Spanish olive growing area
- 1,965 M€ is the value of production

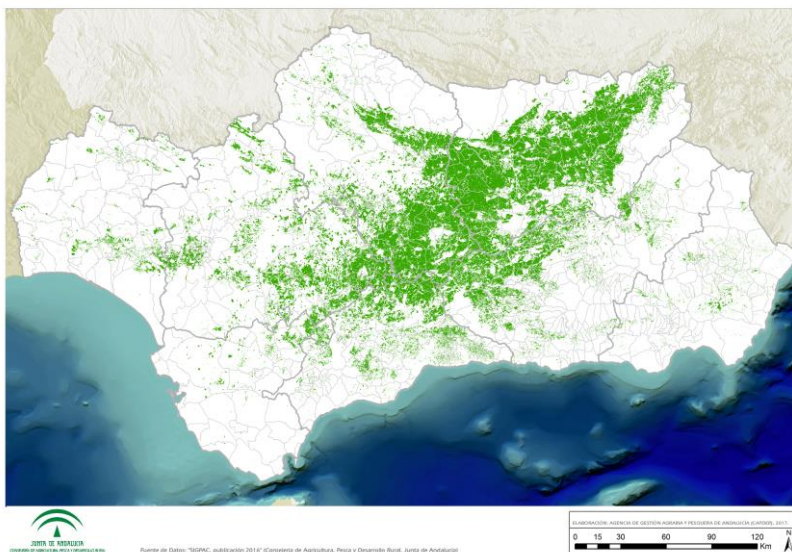


1,200,000 tonnes of
olive oil

...almost 40% of the
total world production

380,000 tonnes of
table olives...

...almost 20% of the
total world production



28% of the Andalusian agri-food exports:

- 1,200 million € of olive oil (21%)
- 420 million € of table olives (7%)



Fruits and vegetables

124,921 ha and 2.64 million tonnes

37.7% of the value of the Spanish production of fruits in the same year

119,741 ha and 6.01 million tonnes

49.8% of the value of the Spanish production of vegetables in the same year

76% of the Spanish area cultivated with vegetables grown in greenhouses



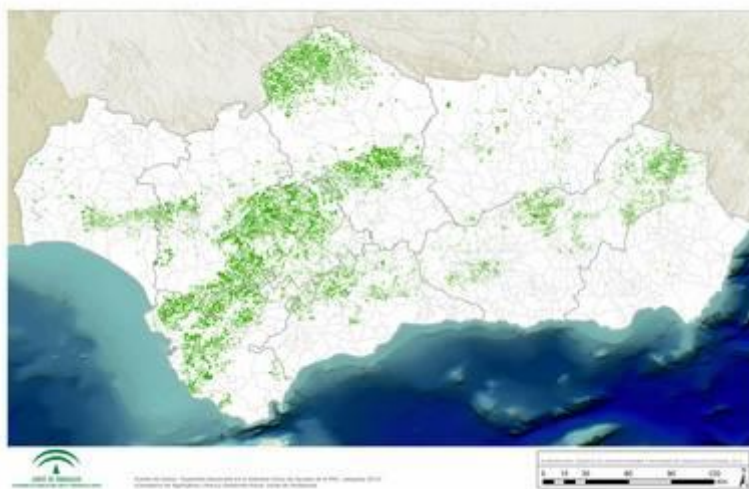
Cereals, oilseeds and protein crops

1 million hectares and 3.38 million tonnes
Cereals (not including rice) represented 66.5% of this surface, oilseeds:
22.3% and protein crops: 11.1%

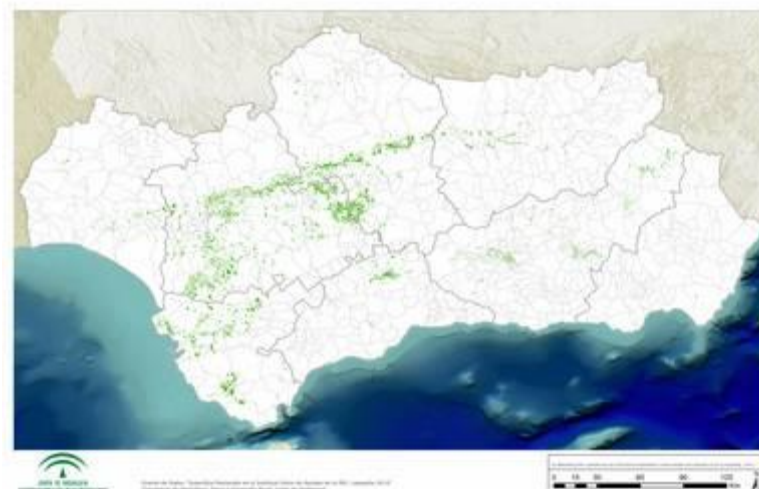


Wheat: 60% of the cultivated area of cereals

Rain-fed cereals



Irrigated cereals



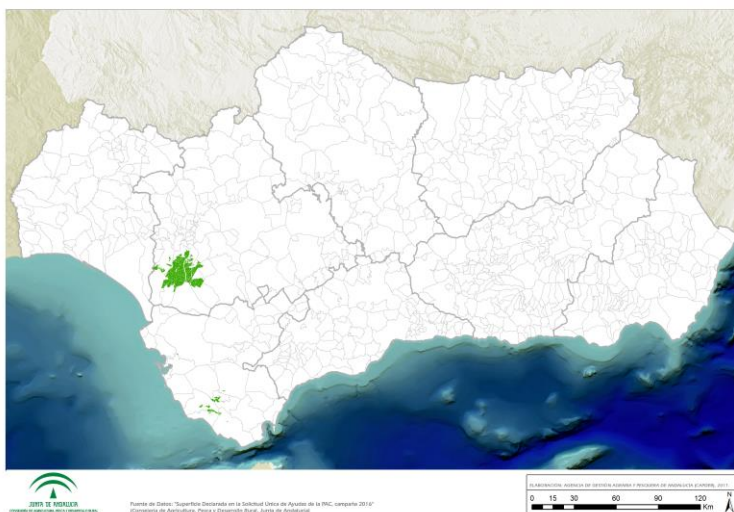


The most important sub-sectors

Rice

40,000 hectares and 370,000 tonnes

This Andalusian area, represented about 37% of the Spanish area and 9% of the Community area in which these crops are grown.



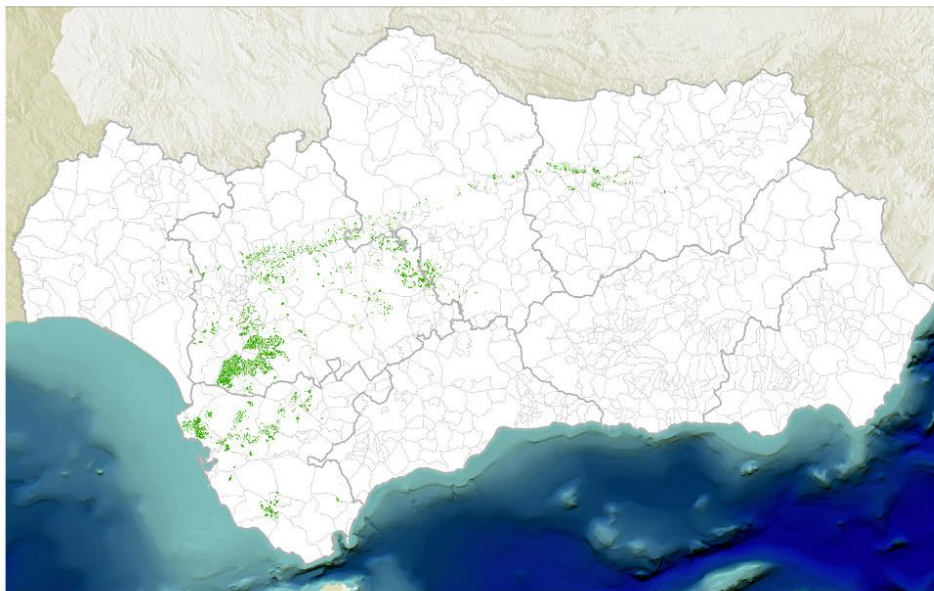


The most important sub-sectors

Cotton

65,000 hectares and 213 million of kg

The Andalusian surface of cotton represented 80% of the national cotton surface, and 19% of EU28 cotton surface in 2018.



Fuente de Datos: "Superficie Declarada en la Solicitud Única de Ayudas de la PAC, campaña 2018"
(Consejería de Agricultura, Pesca y Desarrollo Rural, Junta de Andalucía)



Source: CAGPDS.



Organic production

The value of the Andalusian organic production 442 M€ → 37% of the Spanish organic production

About 1 Mha → 46.8% of the Spanish organic farming area
Main crops: olive groves and cereals and pulses



4,576 organic livestock farms → 62% of the Spanish organic livestock farms
Main productive orientation → 49% beef cattle

2,458 agroindustries



Source: CAGPDS.



The importance of irrigation in Andalusia

18% of the cultivated area is irrigated
It generates 64% of the production of the agricultural sector
It provides 63% of the agricultural employment



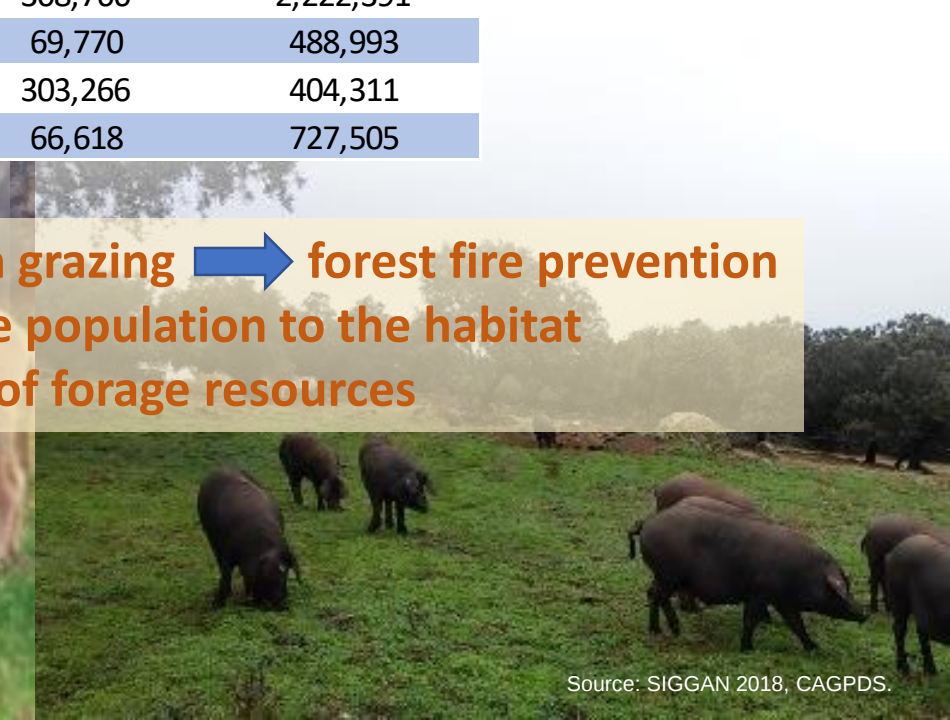
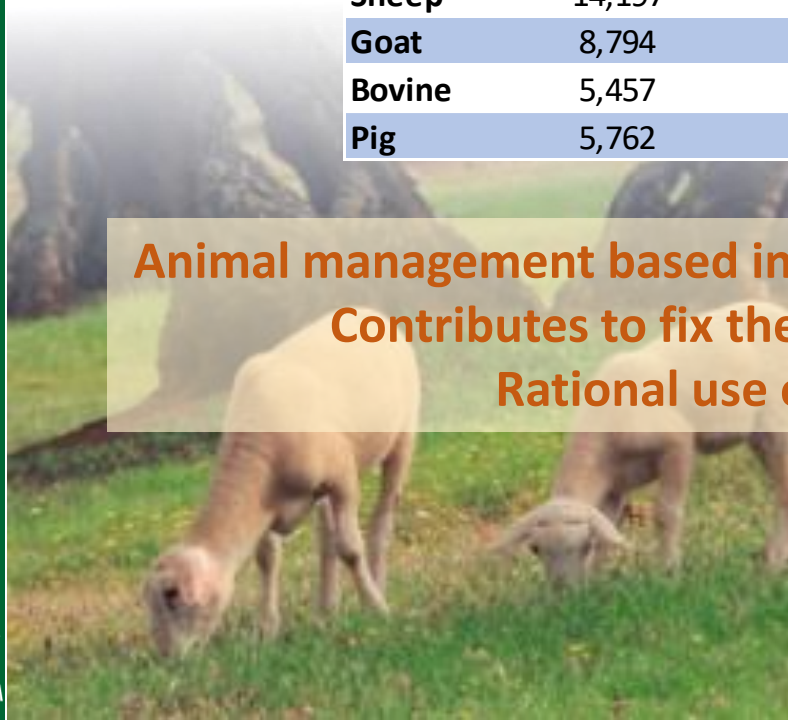


Extensive livestock farms



	Number of farms	Census of livestock units	Number of livestock
Sheep	14,197	308,766	2,222,391
Goat	8,794	69,770	488,993
Bovine	5,457	303,266	404,311
Pig	5,762	66,618	727,505

Animal management based in grazing → forest fire prevention
Contributes to fix the population to the habitat
Rational use of forage resources



The current situation of Fisheries in Andalusia



Gross Value Added (GVA) of Andalusian Fisheries

- 136.55 M€ primary sector
 - Extractive fishing: 111.71 M€
 - Marine aquaculture: 24.84 M€
- 251.59 M€ processing sector and whole sale fishing trade

Main fish species

- marketed: prawns
- in the fattening phase: Sea bass



16.808 employees → 55.5% direct employment



The Agri-food sector



Gross Value Added of the Andalusian agri-food industry

18% of the total GVA of the Andalusian industry

49,000 employees



Leader at national level with 6,113 agri-food industries



Source: CAGPDS.



The Agri-food sector in Andalusia. Quality designations

The agri-food production marketed under quality designations
602 million €



3.6% of the agri-food production value

64 quality designations



32% of the total production value under quality designations and 25 quality designations



34% of the total production value under quality designations and 12 quality designations

Fuente: CAGPDS.

Calidad



29 DOPs

(Denominación de Origen Protegida)

VINOS (8)

- ✓ Condado de Huelva
- ✓ Jerez-Xerés-Sherry
- ✓ Montilla-Moriles
- ✓ Manzanilla-Sanlúcar de Barrameda
- ✓ Málaga
- ✓ Sierras de Málaga
- ✓ Granada
- ✓ Lebrija

ACEITE DE OLIVA V.E. (12)

- ✓ Antequera
- ✓ Baena
- ✓ Estepa
- ✓ Aceite de Lucena
- ✓ Montes de Granada
- ✓ Montoro-Adamuz
- ✓ Poniente de Granada
- ✓ Priego de Córdoba
- ✓ Sierra de Cádiz
- ✓ Sierra de Cazorla
- ✓ Sierra de Segura
- ✓ Sierra Mágina

JAMONES Y PALETAS (2)

- ✓ Jabugo*
- ✓ Los Pedroches

VINAGRES (3)

- ✓ Condado de Huelva
- ✓ Jerez
- ✓ Montilla-Moriles

OTROS PRODUCTOS (3)

- ✓ Aceituna Aloreña de Málaga
- ✓ Pasas de Málaga
- ✓ Miel de Granada

FRUTAS Y HORTALIZAS (1)

- ✓ Chirimoya de la Costa Tropical de Granada-Málaga



30 IGPs

(Indicación Geográfica Protegida)

VINOS (16)

- ✓ Altiplano Sierra Nevada
- ✓ Bailén
- ✓ Cádiz
- ✓ Córdoba
- ✓ Cumbres de Guadalfeo
- ✓ Laderas del Genil
- ✓ Laujar Alpujarra
- ✓ Los Palacios
- ✓ Ribera del Andarax
- ✓ Sierra Norte de Sevilla
- ✓ Sierra Sur Jaén
- ✓ S. Estancias y Filabres
- ✓ Torreperegil
- ✓ Desierto de Almería
- ✓ Norte de Almería
- ✓ Villaviciosa Córdoba

FRUTAS Y HORTALIZAS (2)

- ✓ Espárrago de Huétor-Tajar
- ✓ Tomate La Cañada

PANADERÍA Y REPOSTERÍA (4)

- ✓ Alfajor de Medina Sidonia
- ✓ Mantecados de Estepa
- ✓ Polvorones de Estepa
- ✓ Pan de Alfacar

JAMONES Y PALETAS (2)

- ✓ Jamón de Trevélez
- ✓ Jamón de Serón

OTROS PRODUCTOS (6)

- ✓ Caballa de Andalucía
- ✓ Melva de Andalucía
- ✓ Mojama de Barbate
- ✓ Mojama de Isla Cristina
- ✓ Garbanzo de Escacena
- ✓ Cordero Segureño*

Nuevas solicitudes en proceso de reconocimiento:

- ✓ IGP Aceituna manzanilla de Sevilla
- ✓ IGP Aceituna gordal de Sevilla
- ✓ IGP Mollete de Antequera
- ✓ IGP Aceite de Jaén

* De ámbito supraautonómico

(Especialidad Tradicional Garantizada)

3 ETGs

JAMONES Y PALETAS (1)

- ✓ Jamón Serrano

PANADERÍA Y REPOSTERÍA (1)

- ✓ Torta de aceite de Castilleja de la Cuesta

OTROS PRODUCTOS (1)

- ✓ Leche certificada de granja

(Indicación Geográfica)



BEBIDAS ESPIRITUOSAS (1)

- ✓ Brandy de Jerez

VINO AROMATIZADO (1)

- ✓ Vino Naranja del Condado de Huelva



Agri-food balance of trade

Exports 2018

10,744 M€

Most important products:

- Olive oil
- Fruits and Vegetables
- Olives



Imports 2018

4,434 M€

Most important products:

- Fats, animal or vegetable oil
- Fish and sea food
- Fruits and nuts
- Grain

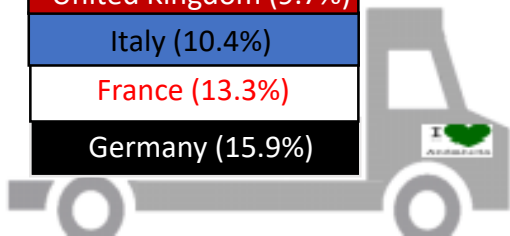


Main sectors	Trade balance (M€)
Fresh vegetables	2,703
Olive oil	1,779
Fresh fruits	1,826
Processed fruits and vegetables	618

The EU is the main destination and supplier

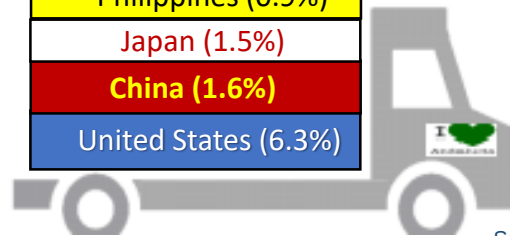
Intra-community destinations

Netherlands (6.7%)
Portugal (7.9%)
United Kingdom (9.7%)
Italy (10.4%)
France (13.3%)
Germany (15.9%)



Extra-community destinations

Switzerland (0.9%)
Philippines (0.9%)
Japan (1.5%)
China (1.6%)
United States (6.3%)





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