



חקלאות ספרד ואירופה לקראת 2020 מגמות ואתגרים בשרשרת השיווק

הרצאה ביום עיון בנושא:

פלפל בערבה בעשור הקרוב, סיכונים והזדמנויות.

תחנת יאיר 30/1/2013, במסגרת אירועי יום פתוח 2013 בערבה

שלמה אורן

TADECSA Spain

EU/Spain Horticulture towards 2020

Trends and challenges in the marketing supply chain

- **EU General**

Farmers ,consumers, supply chain, PAC

- **Almeria Spain General**

Growers, Cooperatives ,mega cooperatives

- **ARRAVA In Spanish eyes....**

products, export companies, possible cooperation





CHRIS
© Original Artist
Reproduction rights obtainable from
www.CartoonStock.com



Crisis

E. Coli 2011: EU vegetable producers hit hard



prices on the rise, vegetable consumption is falling



2012 Business investment rate
down to 19.9% in the euro area
and to 19.6% in the EU27



Farmers' losses per
week (Euros)

Spain:	200m
Italy:	100m
Netherlands:	50m
Germany:	30m
France:	30m
Belgium:	6m
Denmark:	750,000
Lithuania:	150,000



EU Crisess, E Coli ????? EU must eat....



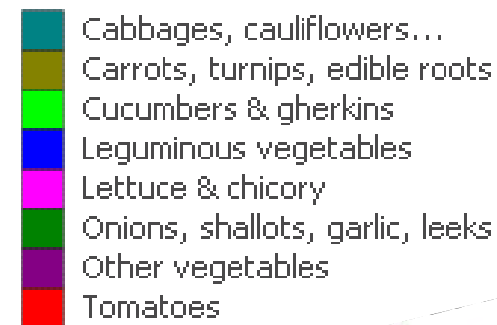
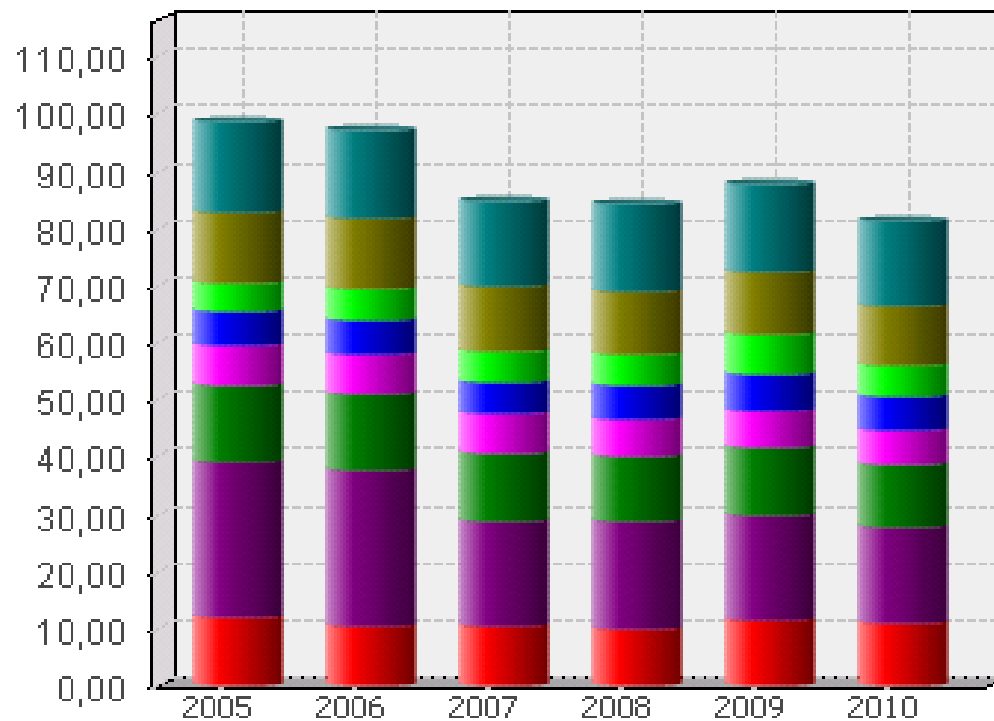
Some eat to live



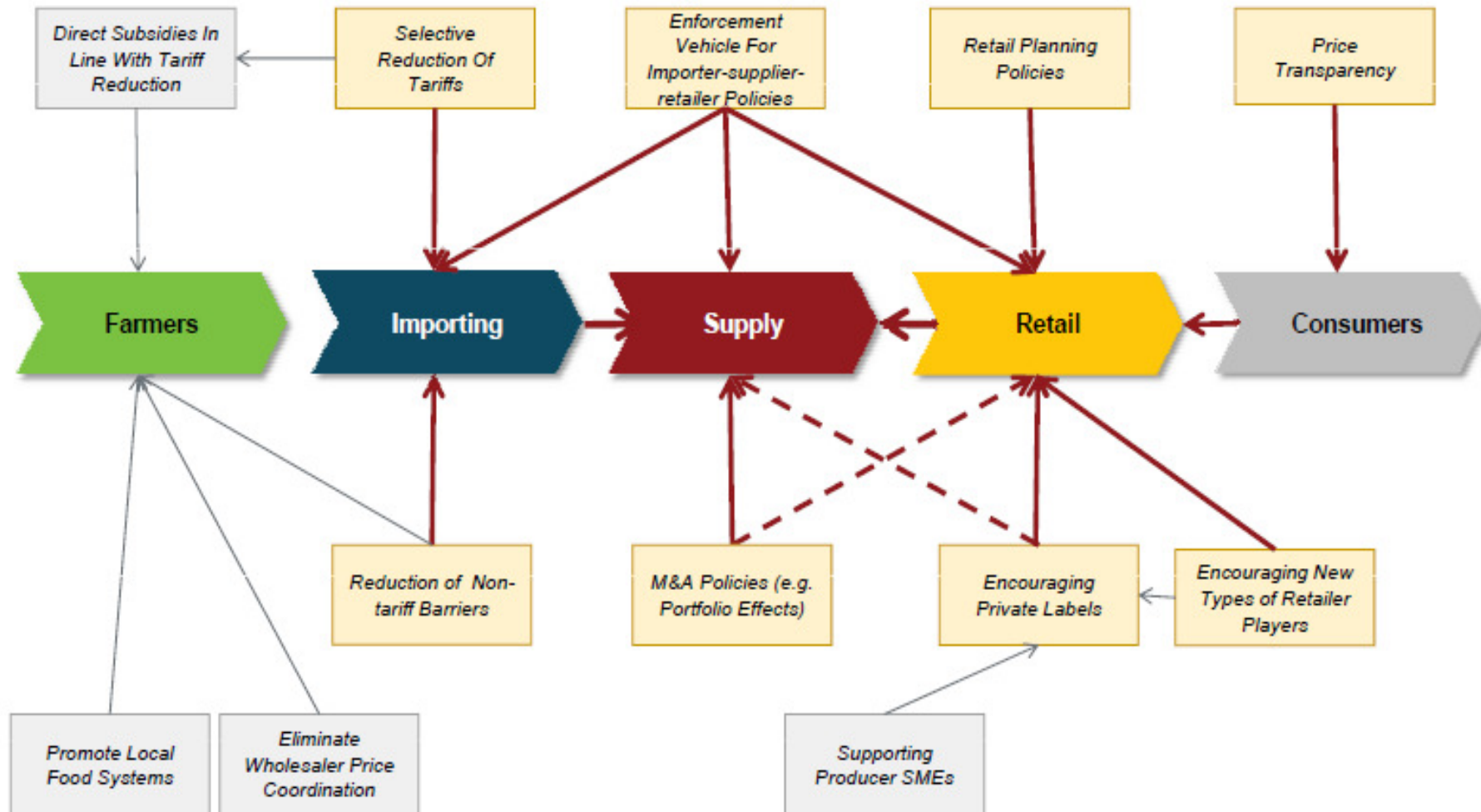
Some Live to eat



EU-27 Gross per capita vegetable consumption (in kg)/year



EU produce supply chain



EU supply chain Dynamics

Growers ,Consumers, Supply chain, CAP

a) **Growers** - insufficient price level, Increased price fluctuations, High risk, Crop insurance, EU 3ed countries agreements.



b) **Retailers** - sales controlled by fewer ,growing bargaining power;
M&A.



c) **Consumers** - increasing demand for services and convenience in food purchasing and preparation, taste, variety, food safety and quality;



d) **Multinational investments in agribusiness** (often developing countries).
upgrading of communication, information technology and transport, enabling fresh products to be transported from many origins are suppliers to the EU market.

e) **CAP-** Common Agricultural Policy – EU long-term policies, strategies, subsidies;

GLOBAL

ECOHAL

AENOR

EUREP-GAP

GLOBALGAP

QUALITY & SAFETY

THE FARMER'S CHOICE

BRITISH PRODUCE

CONSORTIUM

PRODUCTION INTEGRADA

NATURANE

PRIMOR

UNE

Quality control
EU food standards

CAP Recommends:

Growers needs bargaining power

How ??? By :

- Growers concentration
- Adding value to the produce
- Importance of volume to supplier
- Differentiation of produce, innovation
- Use of substitute input, advanced package
- Partnerships between producers and trade
- Marketing, origin branding and labeling of the produce





SOCIALESWEB
ARTE

NASA - Almería Spain

La superficie total de invernaderos **35.000 has.**

La superficie total de pimiento california plantada en campaña 11/12
ha podido alcanzar las **7.000 has.**

4.000 has las variedades más extendidas son Melchor (Zeraim), Gozil y Elvis)



Provincia de Almeria



• 35-40.000 hectáreas de invernaderos
• 4 R&D Centers



82 cooperativas de Almería
16.000 agricultores

• PIB (GDP) Per capita España 2012 24.000 €
• PIB(GDP) Per capita Almeria 2012 25.500 € !!!
• CAJAMAR – Banco de y para los agricultores



AVANC CAMPAÑA HORTÍCOLA 2011/2012 Sep 2011 – Jun 2012

Total Hortaliza

Valor pagado al agricultor: 1.623 M€ (+7,6%)

Valor comercialización : 2.336 M€ (+13,1%)



PIMIENTO:

Más producción, descenso en valor

Producción: 512.945 t (+9,1%)

Valor al agricultor: 345 M€ (-16,8%)

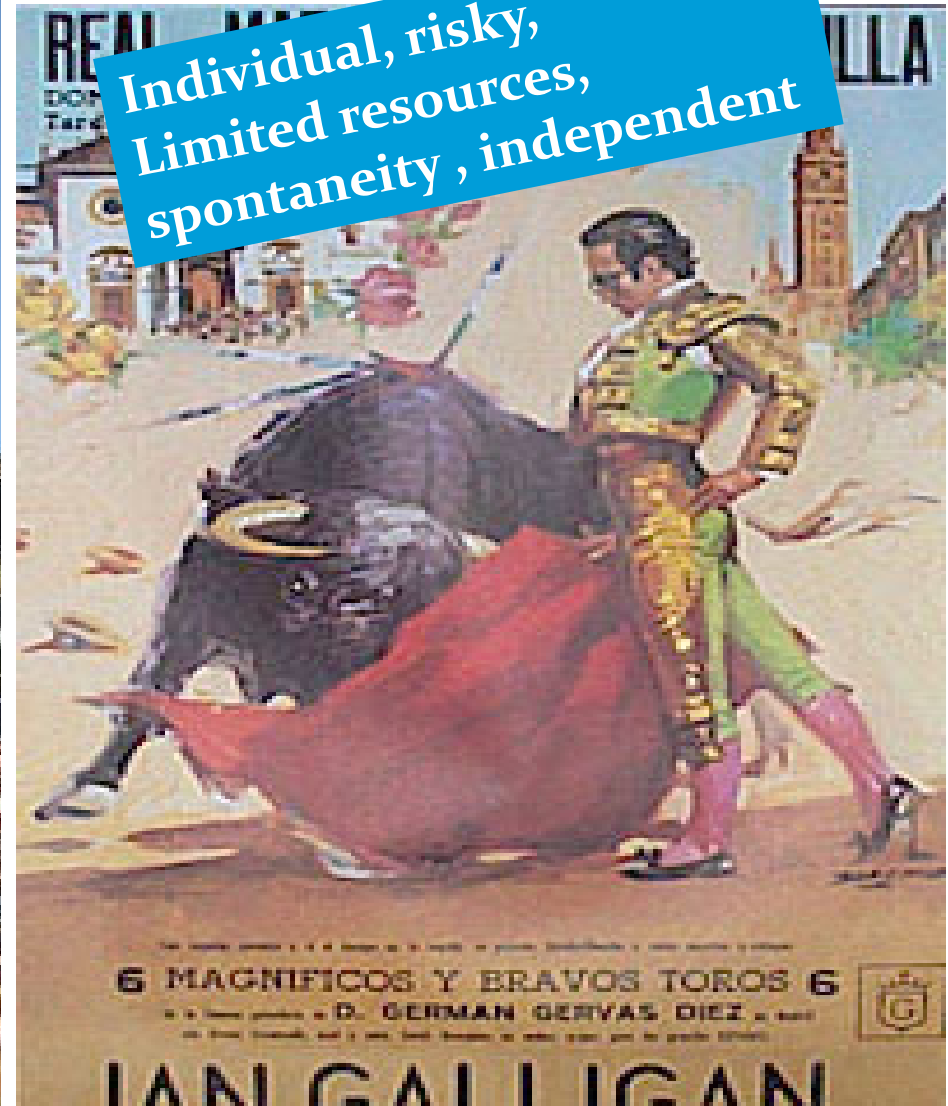


Spanish mega cooperatives “model”

planning, united, organised,
powerful, risk sharing,
commitment !!!



Individual, risky,
Limited resources,
spontaneity, independent





Spanish Mega Cooperatives



business vision and key to success :

- Leader:** in size, image and profitability
- Management:** a model of business excellence
- Quality:** higher control of products and services
- Added value:** satisfying customers and members
- commitment:** transparency vis-à-vis members
- Information technology:** business intelligence
- Innovation :** pioneers and creative
- Efficient logistics :** quick response
- Agro techniques ,genetics, R&D :** at front line
- Trade alliances:** markets knowledge

UNICA

GROUP

- 1.500 growers
- 1.800 hectares
- 6 coops, 6 packing houses
- 180 M kilos,
- 170 M€
- 2.000 workers at packing houses
- 6.500 greenhouse workers



Unica Products & Brands

<p>Berenjena Larga Aubergine</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Judía Larga Long Helda Bean</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Calabacín Zucchini</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Pepino Almería / Midi Cucumber / Midi</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Espárrago Asparagus</p>  <p>DISPONIBILIDAD AVAILABILITY M A M J</p>	<p>Alcachofa Artichoke</p>  <p>DISPONIBILIDAD AVAILABILITY O C T M J J S O N</p>	<p>Pimiento Italiano Italian Pepper</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Pimiento California Bell Pepper Rojo Red Verde Green Amarillo Yellow</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Pimiento Dulce Sweet Pepper PALERMO KAPYA Amarillo Yellow - Naranja Orange - Rojo Red</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>
<p>Pimiento Picante Chilli Pepper Rojo Red - Verde Green - Amarillo Yellow</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Gama Snack Snack Assortment Cherry Pepino Mini Mini Cucumber Pimiento Dulce sin Semillas Sweet & Seedless Pepper Pimiento Sweet Bite Sweet Bite Pepper Amarillo Yellow - Naranja Orange - Rojo Red</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Cherry Pera Sabor Tasty Cherry Plum Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Cherry Rama Cherry Vine Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Cocktail Cocktail Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate de Enristrar Garland Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Kumato Kumato Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Suelto Loose Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Rama Vine Tomato</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>
<p>Tomate Pera Suelto/Rama Loose Plum Tomato/Vine</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Tomate Cherry Pera Rama Cherry Vine Plum Tomato Mini San Marzano</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Sandía Negra sin Semillas Seedless Watermelon</p>  <p>DISPONIBILIDAD AVAILABILITY M J</p>	<p>Sandía Blanca sin Semillas Seedless Watermelon</p>  <p>DISPONIBILIDAD AVAILABILITY M J</p>	<p>Sandía Mini sin Semillas Mini Seedless Watermelon</p>  <p>DISPONIBILIDAD AVAILABILITY A M J</p>	<p>Melón Amarillo Yellow Melon</p>  <p>DISPONIBILIDAD AVAILABILITY M J</p>	<p>Melón Galia Galia Melon</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Fresa Strawberry</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>	<p>Gazpacho Cold Vegetable Soup</p>  <p>DISPONIBILIDAD AVAILABILITY E J F M A M J J A S O N D</p>

UNICA

FRESHQUITA
mini
FRESHQUITA

UNICA BIO



SOOL PASHION



Anecoop



36 - Anecoop's years of experience in the market
79 member cooperatives with thousands of associated farmers
8 international companies and 4 branch offices in Spain
57 - countries we export to
659,281 tonnes marketed in the 2010-2011 campaign
€482 million turnover in 2010-2011

Today Anecoop is :

- Mediterranean's leading fruit and vegetable producer
- Spanish leader in marketing fruit, vegetables and salad stuffs
- world's leading citrus fruit exporter and second largest marketer
- Europe's top watermelon and kaki (Afarsemon...) supplier.





More than 20 years bringing colour and flavour to Europe

BOUQUET seedless watermelons have been Europe's leading brand for more than 20 years. Bouquet comes in a family of four varieties: striped, red, yellow and mini watermelons in addition to standard red watermelons with their dark green skin for more traditional consumers. Seedless and versatile... Watermelons which surprise consumers time after time with their flavour, colour and freshness. Check out our latest innovation in watermelons: our BIO range, Anecoop's organic watermelons in their modern packaging which cater to the latest market trends. Pure colour and flavour. Welcome to Anecoop.



BOUQUET

Growing the future



Anecoop

www.anecoop.com

Anecoop, S. Coop., Monforte, 1 - Entlo. 46010 Valencia • Spain
Tel: +34 963 938 500 • Fax: +34 963 938 510 • e-mail: info@anecoop.com



ARAVA In Spanish eyes....



those were the days my friend....



Days that **AGREXCO** and **Carmel** refers to :
quality, innovation, excellence....





And today's....
What is going on
down there in the Arava ????

400 growers
57 export companies.....!





W.W.W.

What – Exporting 140.000 tm of Arava produce, demands the use of industrial approach, in addition to faming methodology.

- if it was possible to incorporate 1700 a very individual Spanish growers under UNICA, **there must be a way to incorporate the 400 Arava skilled growers under 2 or 3 corporations !!!**

Whom – the Arava local institutions, outside consultancy and management company (TADECSA Spain ?), possible cooperation with UNICA Spain and or others.

When – as soon the Arava local institutions calls for.



סיפור אפריקני עתיק

כל בוקר באפריקה מתעורר הצבי והוא יודע שהוא צריך לרוץ יותר מהר מהאריה הכי מהיר, אחרת הוא יהיה לטרף.

כל בוקר באפריקה מתעורר האריה והוא יודע שהוא צריך להיות יותר מהיר מהצבי הכי איטי, אחרת הוא יגווע ברעב.

הלקח: לא חשוב אם אתה אריה או צבי, כאשר השמש זורחת באפריקה, נגזר עליך לרוץ.....

בקיצור, לא משנה אם אתה חקלאי בערבה או באלמריה כאשר השמש זורחת, נגזר עליך להיות במתח.....



- Gracias
- Thanks
- תודה



Prepared by S.Oren
TADExA LTD

SPAIN ESPAÑA