

Spain: Citrus juice industry worth over 250 million Euro

The latest figures about the performance of Spain's traditional citrus juicing sector reveal great results: 200 million Euro in exports and about 50 million Euro in the domestic market, according to sources from the Spanish Association of Juice and Concentrates Industry (AIZCE).

Meanwhile, the figures supplied by the European Fruit Juice Association (AIJN) reveal that, over the last five years, the consumption of fruit juices and nectars in the European Union has fallen from 10,810 million litres in 2011 to 9,630 million litres in 2015, although the difference between last year and the previous one was only of - 0.73%. Without a doubt, the leadership of orange juice is still unquestionable: it accounts for 37% of the total.

The giants of the sector

The processing industry for oranges, mandarins and, to a much lesser extent, lemons, is considered a key part of the sector, especially in the Region of Valencia, which is mostly focused on the marketing of fresh juice.

Zuvamesa, based in Sagunto, belongs to an association of 55 exporters, while Agriconsa is a subsidiary of Anecoop, a second grade cooperative whose main purpose is also the marketing of oranges and mandarins. Between the two they account for around 40% of Spain's citrus juice production. Other important names in the industry are García Carrión, which has a plant with a similar capacity to that of Zuvamesa, and two more in Jumilla and Andarax, the Antonio Muñoz Company group (AMC Group), based in Murcia, or Zumos Palma, based in Palma del Río, Córdoba, as well as Nufri and Indulleida (both in Catalonia). All of them, together with the almost fifty packaging companies, make up a flourishing processing sector which is currently undergoing many changes.

The activity of these plants is strategic, because they serve to give a use to the volumes that fail to meet the commercial requirements for the fresh market. The Committee of Citrus Management (CGC) has already warned that the current season was going to be marked by the predominance of small calibres, so it is more than foreseeable that the figures achieved by the juicing industry will increase this campaign. And according to their figures, there is room to do so. In the 2015/2016 season, 813,000 tonnes were processed into juice; a small volume compared to previous campaigns; a result also of a very small harvest. This season, more than 1 million tonnes will likely be processed, which is a more normal figure.

All in all, "we will have to see what response the industry and the market give us, because not all calibres and qualities are suitable for being processed and there are a lot of oranges and clementines that do not meet the right conditions for juice production," concludes García.

But perhaps a fundamental aspect has been the consolidation of a key strategy for the Spanish sector: the differentiation of "pure juice" with labelling that identifies it as "100% squeezed." This is a product characterised by containing no added sugar, water or preservatives, which undergoes just a pasteurization treatment and cold storage. "This is the segment that the consumer perceives to be of premium quality, closer to actual fresh juice, and this type of juice is also the one preferred by the Spanish industry," affirms the director of AIZCE.

Prospects of greater demand

European statistics also show a positive performance of "100% squeezed" juice. Again according to AIJN, the total volume of juices marketed in the EU in 2015 stood at 6,142 million litres, of which 31.4% corresponded to this type of juice and the other 68.6% to juices from concentrate. But if we analyse the development of these two products from the year 2013 to 2015, we can see that fresh juice has grown by 5.3% over the last three years and, on the contrary, juice from concentrate has recorded a 9.2% drop in consumption.

As a result of this increased demand and the greater margin for fresh juice, over the last decade (2005-2015), Brazil, which is estimated to produce almost 8 out of 10 glasses of juice consumed in the world, has reduced its exports of juice from concentrate from one million tonnes in 2005 to just over 500,000 in 2015, while increasing its shipments of "not from concentrate" juice from 410,000 tonnes in 2005 to 1.1 million tonnes in 2015.

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