

# **The agrarian and fisheries sector in Andalusia**

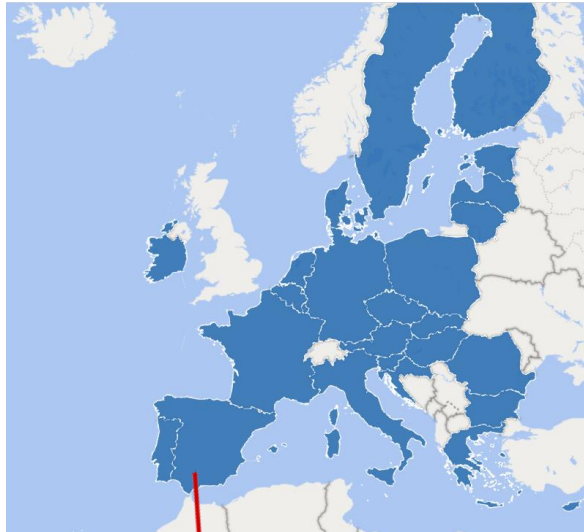
November 2023



# Region of Andalusia

27 EU Member  
States since January  
1, 2021

BASIC DATA



**Member State:** Spain.

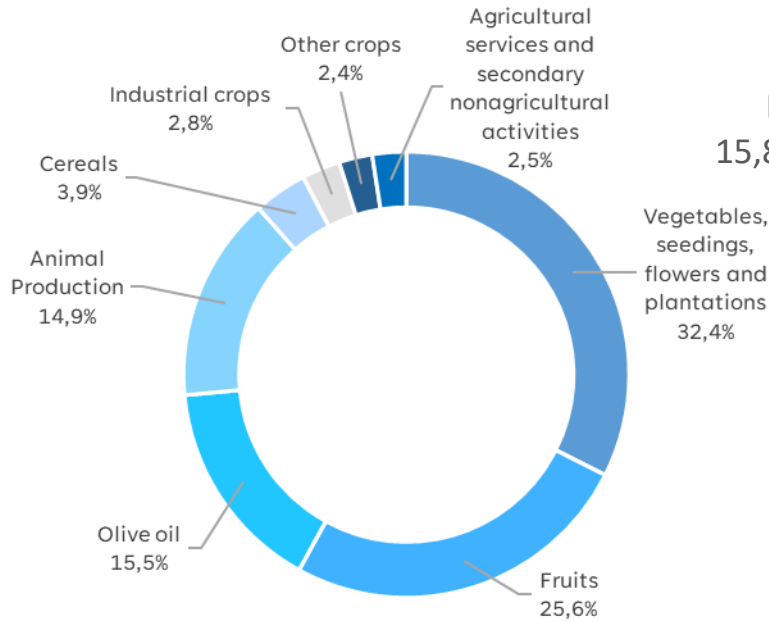
**Area:** 87,597 km<sup>2</sup> (17% of the Spanish area, 2% of the EU area).

**Population:** 8,494,155 people (17.9% of the Spanish population and 1.9% of the EU total population).



# PAS and population working in the agricultural sector

SOCIO-ECONOMIC CONTEXT



Source: CAPADR. Regional Agricultural Accounts.

## Production of the Agricultural Sector (PAS)

Production of the Agricultural Sector in Andalusia was 15,885 millions euros in 2022. This represented 25.1% of the PAS of Spain and 3.0% of the EU27.



## Population working in agricultural sector

In Andalusia: 7.4%.

In Spain: 3.8%.

In EU27: 3.7%

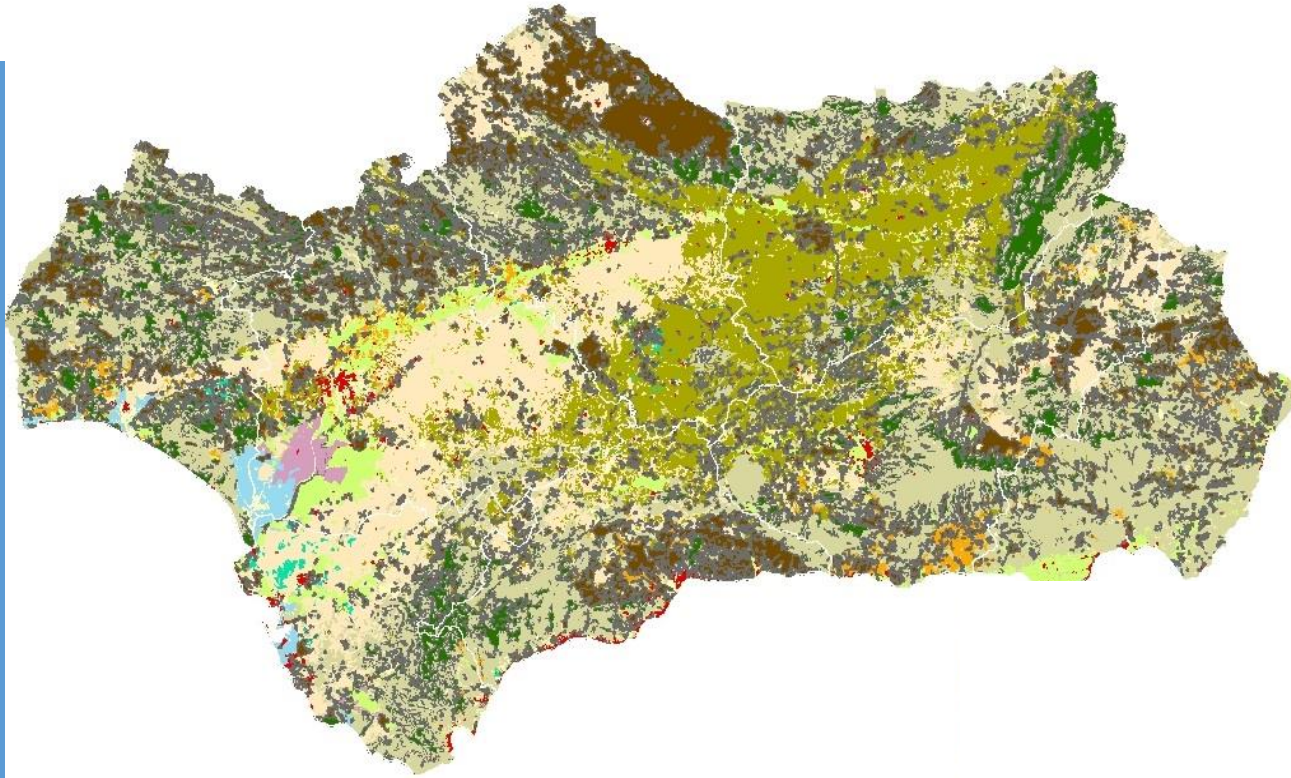


Agricultura activities are the main source of employment in half of Andalusian municipalities.

Source: Eurostat.



# Distribution of cultivation areas



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

Arable land: 33.5%  
Grazing land: 25.9%  
Other: 40.6%



Andalusian UAA  
4.75 Mha



50% of the total Andalusian area.

Source: 2020, Agrarian Census. Spanish National Statistics Institute.





# A very diverse agriculture that .....

Dehesa



Las Campiñas



Olive growing



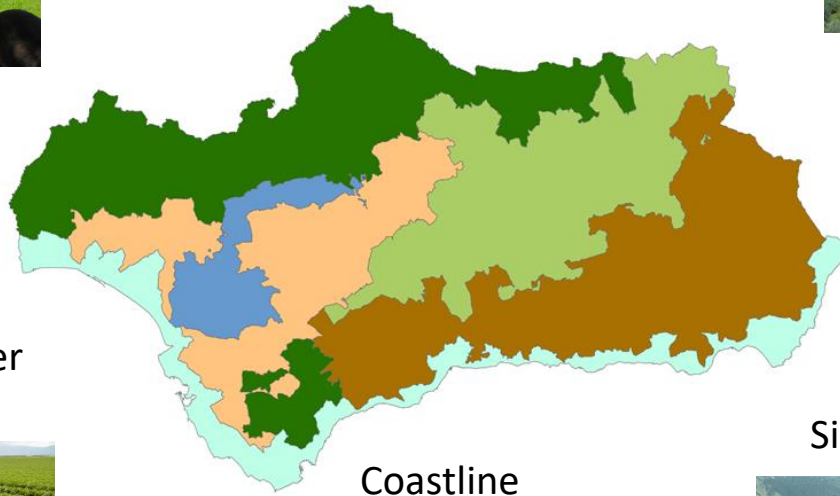
Valley of the river Guadalquivir



Coastline



Sierras Beticas



..... plays an important role in our landscapes



# A very diverse agriculture: La Dehesa





# A very diverse agriculture: Las Campiñas





# A very diverse agriculture: Olive growing





# A very diverse agriculture: Las Sierras Béticas





# A very diverse agriculture: Coastline





# A very diverse agriculture: Valley of the river Guadalquivir





# Olive growing

- 1.64 million hectares (560,000 hectares are irrigated).
- 4,299 M€ is the value of production in 2022 (Olive oil: 2,860 M€; Table olives: 394 M€; Olives processed in the industry: 1,045 M€).
- 27.2% of the Agricultural Production Value in Andalusia.
- Main activity for more than 300 municipalities and 250,000 families.

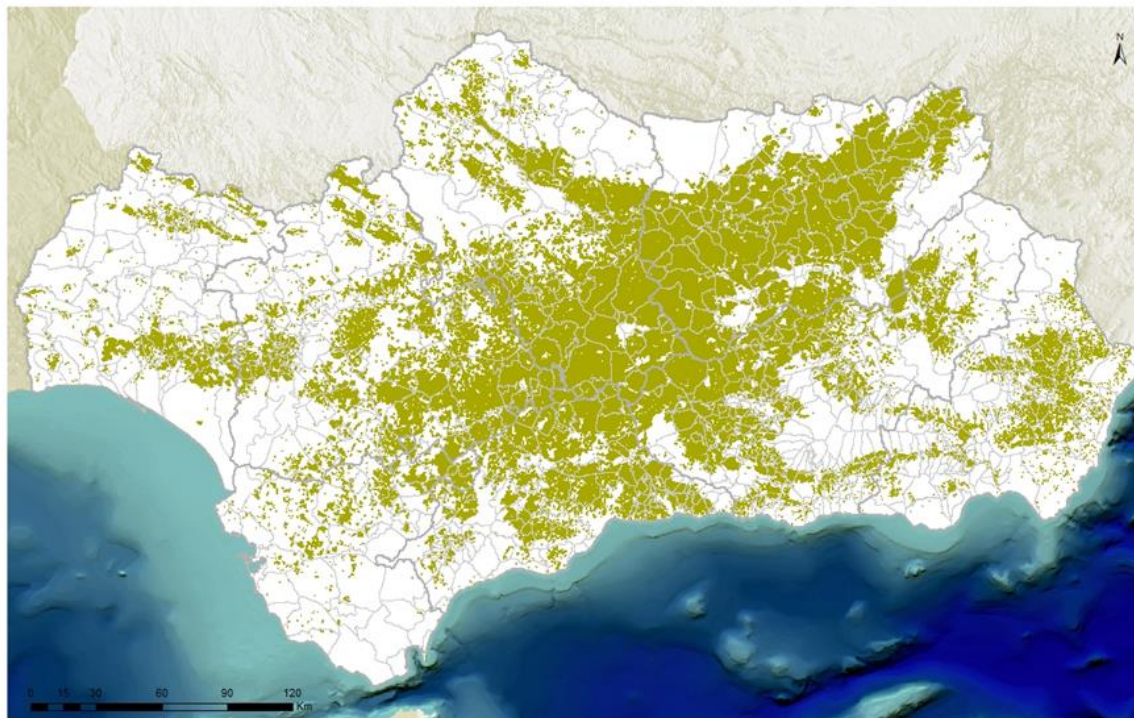
## Agricultural season 2021/22

1,115,432 tonnes of olive oil...

...almost 34% of the total world production

545,311 tonnes of table olives...

...almost 19% of the total world production



28% of the Andalusian agri-food exports:

- 2,894 million € of olive oil (21%).
- 525 million € of table olives (4%).







# Fruits and vegetables

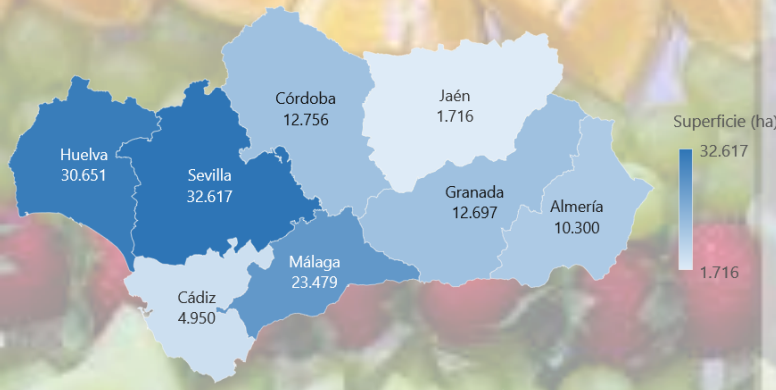
THE MOST IMPORTANT SUB-SECTORS

## Fruits

151,802 ha y 2.37 million tonnes

35% of the value of the Spanish production of fruits in the same year.

### Area (ha)



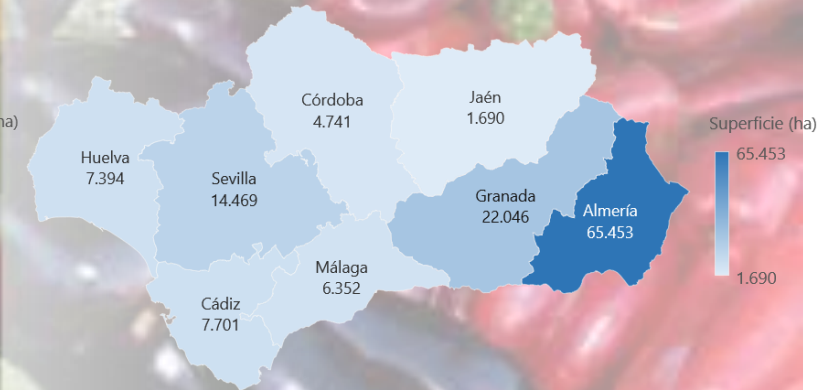
Con tecnología de Bing  
© GeoNames, TomTom

## Vegetables

121,805 ha y 6.05 million tonnes

53% of the value of the Spanish production of vegetables in the same year.

### Area (ha)



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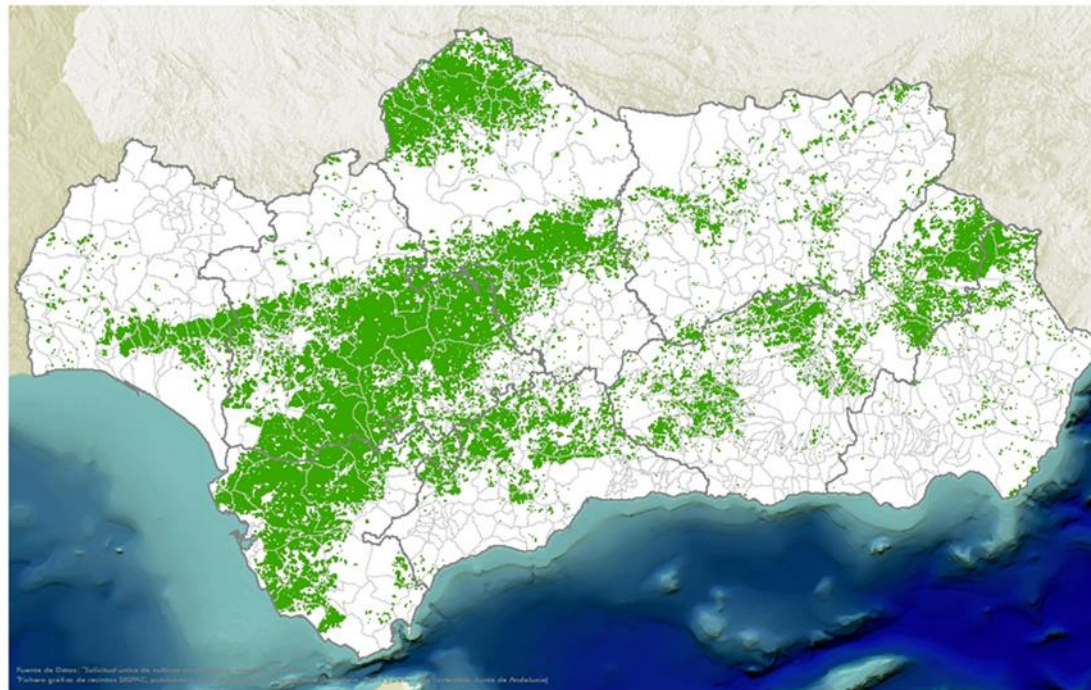


# Cereals, oilseeds and protein crops

887,585 hectares and 1.86 million tonnes in 2022.

Cereals (not including rice) represented 64% of this surface, oilseeds: 29% and protein crops: 7%.

Wheat: 56% of the cultivated area of cereals.



Fuente de Datos: "Análisis sectorial de cultivos agrícolas en Aragón"  
"Informe global de recursos SIOAC" publicado por el Observatorio de Estadística de Aragón



THE MOST IMPORTANT SUB-SECTORS

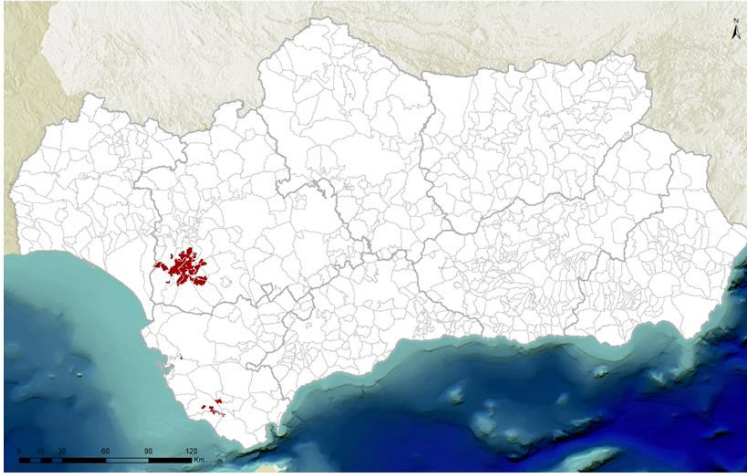




# Rice

12,695 hectares and 89,279 tonnes en 2022. The Andalusian area of rice represented about 23% of the Spanish area and 3.5% of UE27 area in which these crops are grown.

THE MOST IMPORTANT SUB-SECTORS





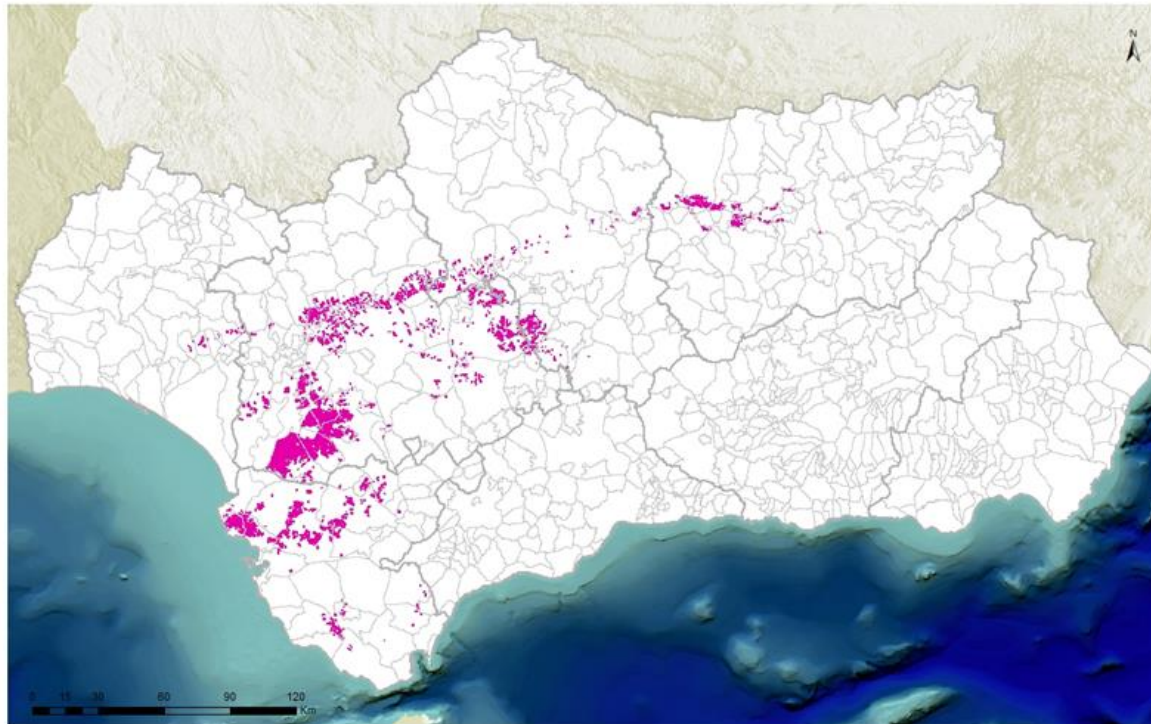
# Cotton

51,808 hectares and 122.49 million kg en 2022.

The Andalusian surface of cotton represented 100% of the national cotton surface, and 18% of EU27 cotton surface in 2022.



THE MOST IMPORTANT SUB-SECTORS





# Organic Production

1.35 million hectares → 47.9% of the Spanish organic farming area.

Main crops: olive groves and cereals and pulses.



5,421 organic livestock farms

→ 7.7% of the Spanish organic livestock farms.

Main productive orientation:

→ Beef cattle (52%).

3,353 agroindustries.

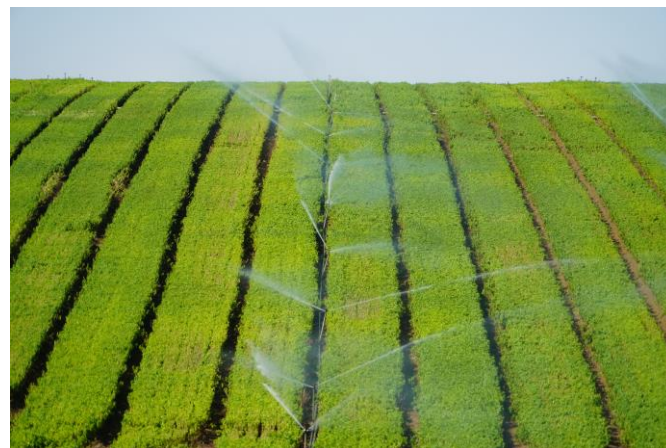




# The importance of irrigation in Andalusia

IRRIGATED AGRICULTURE

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







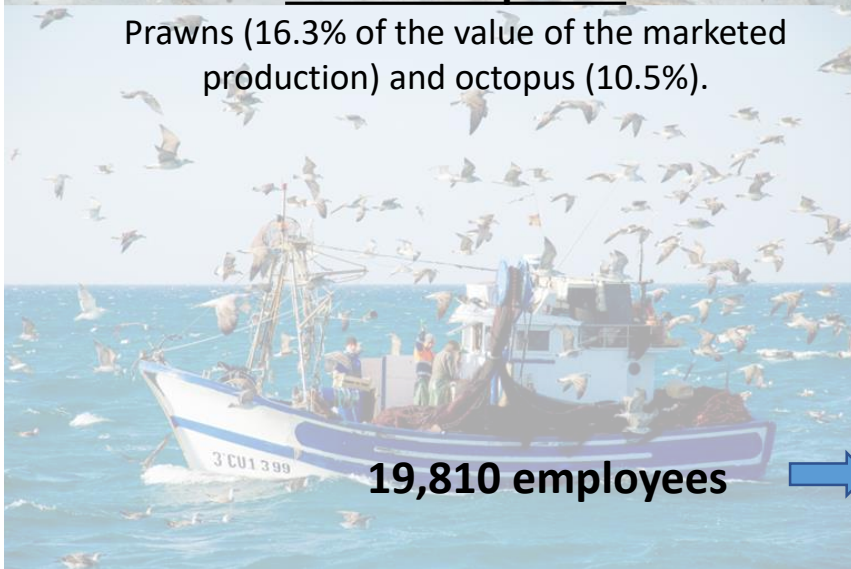
# Fisheries in Andalusia

FISHERIES SECTOR



## Main fish species

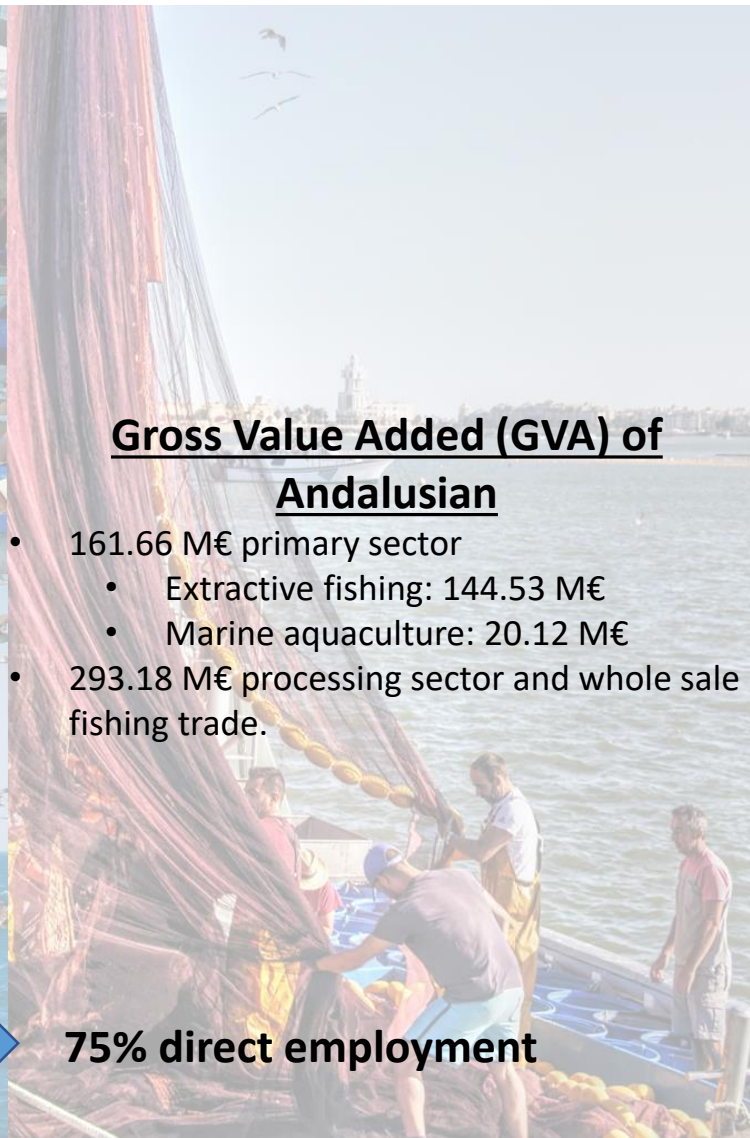
Prawns (16.3% of the value of the marketed production) and octopus (10.5%).



19,810 employees



75% direct employment



## Gross Value Added (GVA) of Andalusian

- 161.66 M€ primary sector
  - Extractive fishing: 144.53 M€
  - Marine aquaculture: 20.12 M€
- 293.18 M€ processing sector and whole sale fishing trade.



# The Agri-food sector in Andalusia

THE AGRI-FOOD SECTOR



61,946 employees



Leader at national level with 5,589 agri-food industries







# Quality designations

The agri-food production marketed under quality designations

567.05 million €

## 69 quality designations



28.9% of the total production value under quality designations and 26 quality designations.



40.3% of the total production value under quality designations and 12 quality designations.

THE AGRI-FOOD SECTOR



## 30 DENOMINACIONES DE ORIGEN PROTEGIDAS (DOP)

<b>VINOS (8)</b> <ul style="list-style-type: none"> <li>✓ Condado de Huelva</li> <li>✓ Granada</li> <li>✓ Jerez-Xérès-Sherry</li> <li>✓ Lebrija</li> <li>✓ Málaga</li> <li>✓ Montilla-Moriles</li> <li>✓ Manzanilla-Sanlúcar de Barrameda</li> <li>✓ Sierras de Málaga</li> </ul>	<b>ACEITE DE OLIVA V.E. (12)</b> <ul style="list-style-type: none"> <li>✓ Aceite de Lucena</li> <li>✓ Antequera</li> <li>✓ Baena</li> <li>✓ Estepa</li> <li>✓ Montes de Granada</li> <li>✓ Montoro-Adamuz</li> <li>✓ Poniente de Granada</li> <li>✓ Priego de Córdoba</li> <li>✓ Sierra de Cádiz</li> <li>✓ Sierra de Cazorla</li> <li>✓ Sierra de Segura</li> <li>✓ Sierra Mágina</li> </ul>	<b>JAMONES Y PALETAS (2)</b> <ul style="list-style-type: none"> <li>✓ Jabugo*</li> <li>✓ Los Pedroches</li> </ul>
<b>FRUTAS Y HORTALIZAS (1)</b> <ul style="list-style-type: none"> <li>✓ Chirimoya de la Costa Tropical de Granada-Málaga</li> </ul>		<b>VINAGRES (3)</b> <ul style="list-style-type: none"> <li>✓ Condado de Huelva</li> <li>✓ Jerez</li> <li>✓ Montilla-Moriles</li> </ul>
		<b>OTROS PRODUCTOS (4)</b> <ul style="list-style-type: none"> <li>✓ Aceituna Aloreña de Málaga</li> <li>✓ Miel de Granada</li> <li>✓ Miel de Málaga**</li> <li>✓ Pasas de Málaga</li> </ul>



## 34 INDICACIONES GEOGRÁFICAS PROTEGIDAS (IGP)

<b>VINOS (16)</b> <ul style="list-style-type: none"> <li>✓ Altiplano Sierra Nevada</li> <li>✓ Bailén</li> <li>✓ Cádiz</li> <li>✓ Córdoba</li> <li>✓ Cumbres de Guadalfeo</li> <li>✓ Desierto de Almería</li> <li>✓ Laderas del Genil</li> <li>✓ Lujar Alpujarra</li> <li>✓ Los Palacios</li> <li>✓ Norte de Almería</li> <li>✓ Ribera del Andarax</li> <li>✓ Sierra Norte de Sevilla</li> <li>✓ Sierra Sur Jaén</li> <li>✓ Sierra de Las Estancias y Los Filabres</li> <li>✓ Torreperogil</li> <li>✓ Villaviciosa Córdoba</li> </ul>	<b>FRUTAS Y HORTALIZAS (2)</b> <ul style="list-style-type: none"> <li>✓ Espárrago de Huétor-Tajar</li> <li>✓ Tomate La Cañada</li> </ul>	<b>PRODUCTOS PESQUEROS (4)</b> <ul style="list-style-type: none"> <li>✓ Caballa de Andalucía</li> <li>✓ Melva de Andalucía</li> <li>✓ Mojama de Barbate</li> <li>✓ Mojama de Isla Cristina</li> </ul>
	<b>PANADERÍA Y REPOSTERÍA (5)</b> <ul style="list-style-type: none"> <li>✓ Alfajor de Medina Sidonia</li> <li>✓ Mantecados de Estepa</li> <li>✓ Polvorones de Estepa</li> <li>✓ Pan de Alfacar</li> <li>✓ Mollete de Antequera</li> </ul>	<b>ACEITUNAS (2)</b> <ul style="list-style-type: none"> <li>✓ Aceituna manzanilla de Sevilla**</li> <li>✓ Aceituna gordal de Sevilla**</li> </ul>
	<b>JAMONES, PALETAS, CARNES (2)</b> <ul style="list-style-type: none"> <li>✓ Jamón de Trevélez</li> <li>✓ Jamón de Serón</li> <li>✓ Cordero Segureño*</li> </ul>	<b>OTROS PRODUCTOS (2)</b> <ul style="list-style-type: none"> <li>✓ Garbanzo de Escacena</li> <li>✓ Aceite de Jaén</li> </ul>

\* De ámbito supratonómico.

\*\* Solicitados, no registrados.



## 3 ETGs

(Especialidad Tradicional Garantizada)



(Indicaciones geográficas - IGBE, IGPVA)

<b>BEBIDAS ESPIRITUOSAS (1) IGBE</b> <ul style="list-style-type: none"> <li>✓ Brandy de Jerez</li> </ul>	<b>VINO AROMATIZADO (1) IGPVA</b> <ul style="list-style-type: none"> <li>✓ Vino Naranja del Condado de Huelva</li> </ul>
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### JAMONES Y PALETAS (1)

- ✓ Jamón Serrano

### PANADERÍA Y REPOSTERÍA (1)

- ✓ Tarta de aceite de Castilleja de la Cuesta

### OTROS PRODUCTOS (1)

- ✓ Leche certificada de granja

# Agri-food balance of trade in Andalusia

Exports 2022

**14,227 M€**

Most important products:  
Olive oil, fruits and vegetables.



Imports 2022

**7,522 M€**

Most important products:  
Fats, animal or vegetable oils and  
fish and sea food.

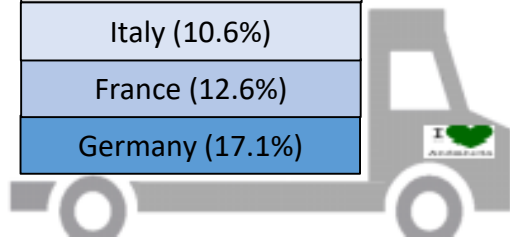


Main sectors	Trade balance (M€)
Fresh vegetables	3,653
Olive oil	1,701
Fresh fruits	2,050
Processed fruits and vegetables	670

**UE27 is the main destination and supplier**

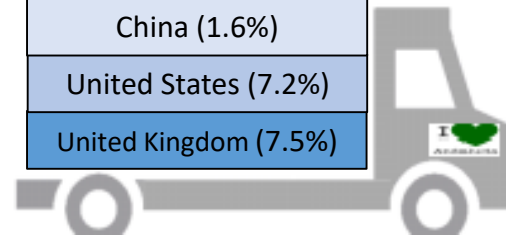
## Intra-community destinations

The Netherlands (6.9%)
Portugal (8.2%)
Italy (10.6%)
France (12.6%)
Germany (17.1%)



## Extra-community destinations

Japan (1.1%)
Switzerland (1.2%)
China (1.6%)
United States (7.2%)
United Kingdom (7.5%)



AGRI-FOOD BALANCE OF TRADE





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