

The agrarian and fisheries sector in Andalusia

November 2023



Region of Andalusia

BASIC DATA



Member State: Spain.

Area: 8.8 million ha (17% of the Spanish area, 2% of the EU area).

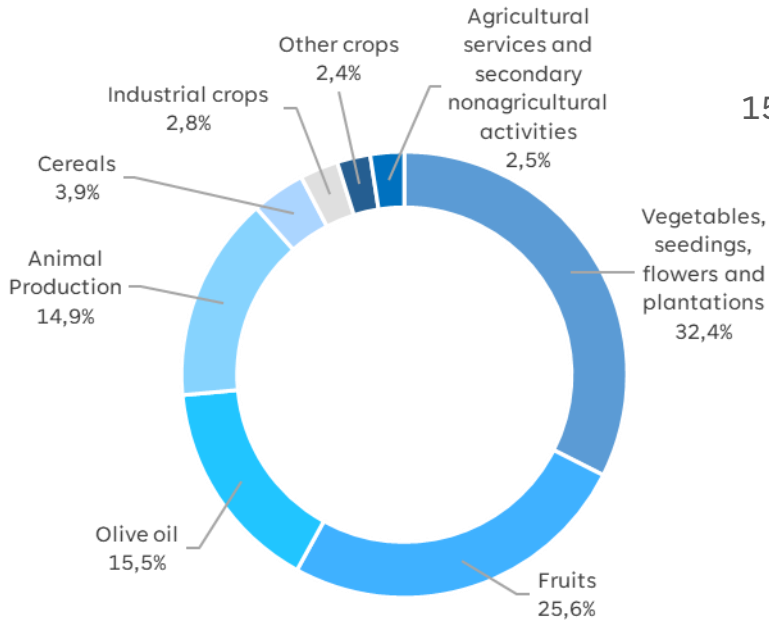
Population: 8.6 million inhabitants (18% of the Spanish population and 2% of the EU total population).





PAS and population working in the agricultural sector

SOCIO-ECONOMIC CONTEXT



Source: CAPADR. Regional Agricultural Accounts.

Production of the Agricultural Sector (PAS)

15,885 millions euros in 2022. This represented 25% 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.



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%)

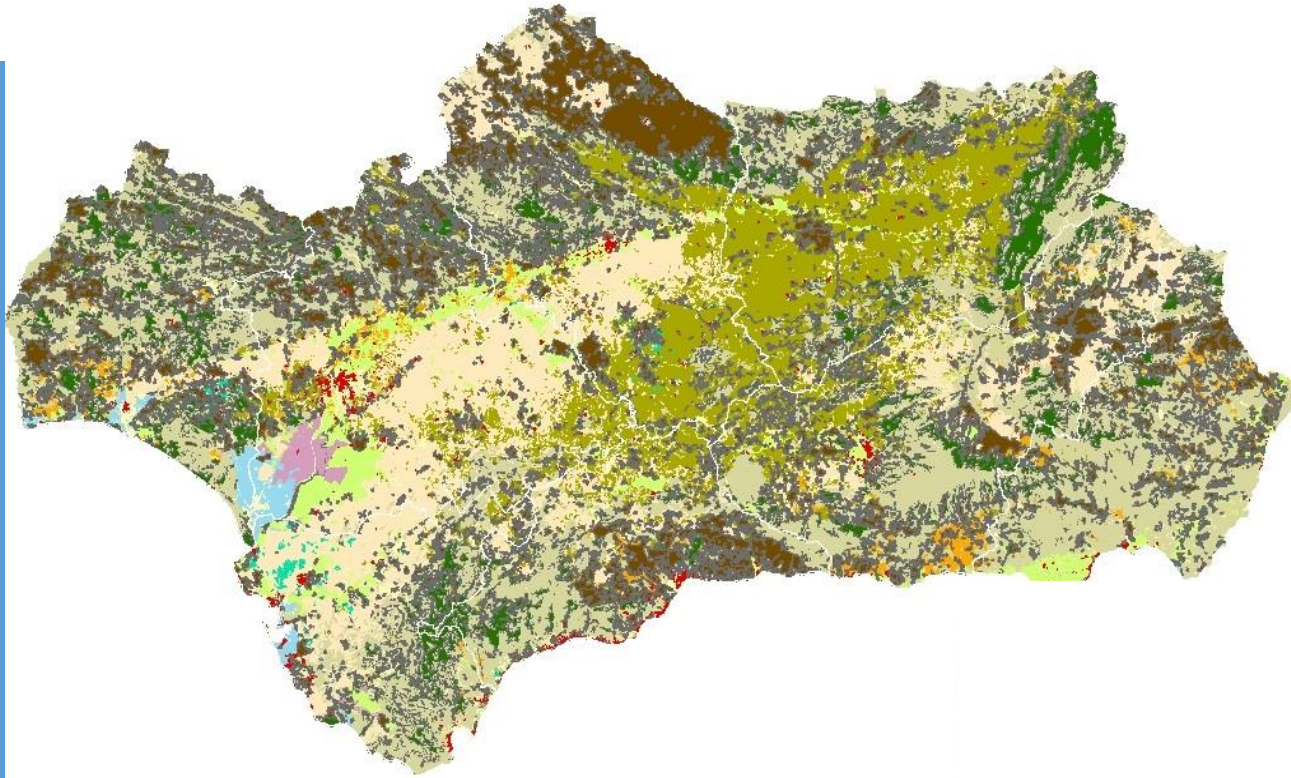
Extra-community destinations

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





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



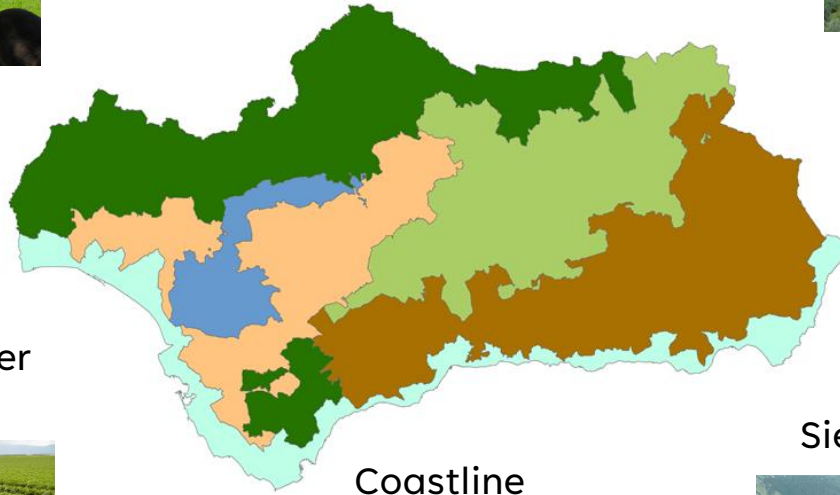
Valley of the river Guadalquivir



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



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 → 57.7% of the Spanish organic livestock farms.

Main productive orientation: → Beef cattle (52%).

3,353 agroindustries.

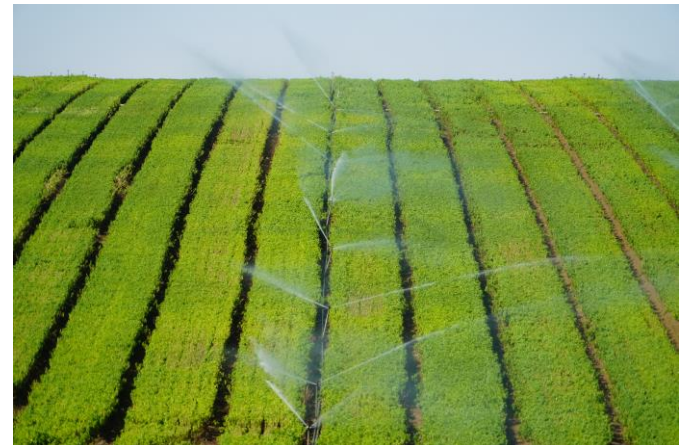




The importance of irrigation in Andalusia

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.



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 SECTOR

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.



30 DENOMINACIONES DE ORIGEN PROTEGIDAS (DOP)

VINOS (8) <ul style="list-style-type: none"> ✓ Condado de Huelva ✓ Granada ✓ Jerez-Xérès-Sherry ✓ Lebrija ✓ Málaga ✓ Montilla-Moriles ✓ Manzanilla-Sanlúcar de Barrameda ✓ Sierras de Málaga 	ACEITE DE OLIVA V.E. (12) <ul style="list-style-type: none"> ✓ Aceite de Lucena ✓ Antequera ✓ Baena ✓ Estepa ✓ 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) <ul style="list-style-type: none"> ✓ Jabugo* ✓ Los Pedroches
FRUTAS Y HORTALIZAS (1) <ul style="list-style-type: none"> ✓ Chirimoya de la Costa Tropical de Granada-Málaga 		VINAGRES (3) <ul style="list-style-type: none"> ✓ Condado de Huelva ✓ Jerez ✓ Montilla-Moriles
		OTROS PRODUCTOS (4) <ul style="list-style-type: none"> ✓ Aceituna Aloreña de Málaga ✓ Miel de Granada ✓ Miel de Málaga** ✓ Pasas de Málaga



34 INDICACIONES GEOGRÁFICAS PROTEGIDAS (IGP)

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

* De ámbito sup autonómico.

** Solicitados, no registrados.



3 ETGs

(Especialidad Tradicional Garantizada)



(Indicaciones geográficas - IGBE, IGPVA)

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

Spanish CAP Strategic Plan 2023-2027

Design:

- Pilar I: National Level
- Pilar II (Rural Development): Regional Level

Main interventions:

- Direct Payments: 4,900 M€/ year (1.450 M€ Andalucía)
- Interventions in certain sectors: 450 M€/ year (150 M€ in Andalucía)
- Rural Development interventions: 1.750 M€/ year (300 M€ in Andalucía)

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Spanish CAP Strategic Plan 2023-2027

Regional Interventions	Budget (millions €)	%
Environmental commitments	226	16%
Organic farming	227	16%
Natural constraints	70	5%
Investments in farms	146	10%
Investments in agro-industry	164	11%
Investments in irrigation	54	4%
Investments in rural areas	39	3%
Investments in forestry	151	10%
Setting-up of young farmers	130	9%
LEADER	170	12%
Promotion	15	1%
EIP Operational Groups	18	1%
Knowledge exchange	13	1%
Advisory services	33	2%
Total	1.456	

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