



PERSPECTIVAS DE FUTURO DE LA ALMENDRA ESPAÑOLA

II JORNADA TECNICA DEL ALMENDRO

CASPE, 4 DE ABRIL DE 2019



Frutaria
nuts

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Director Frutos Secos Frutaria Agricultura, S.L.

EFFECTIVOS PRODUCTIVOS

PRODUCCION

VARIEDADES

MERCADOS

CONSUMO

PERSPECTIVAS



EFFECTIVOS
PRODUCTIVOS

Distribución de la superficie de estudio de la ESYRCE 2018

Comunidad Autónoma	Superficie Regadío (ha)	Total Superficie cultivo (ha)	Superficie geográfica (ha)	Sup. regadío/Sup. Cultivo (%)	Sup. Regadío/Sup. Geográfica (%)
GALICIA	17.364	369.077	2.957.557	4,70%	0,59%
P.DE ASTURIAS	599	24.954	1.060.354	2,40%	0,06%
CANTABRIA	463	6.987	532.944	6,63%	0,09%
PAIS VASCO	8.305	82.510	723.296	10,07%	1,15%
NAVARRA	101.934	329.004	1.039.038	30,98%	9,81%
LA RIOJA	41.813	157.542	504.503	26,54%	8,29%
ARAGON	408.996	1.791.074	4.772.040	22,84%	8,57%
CATALUÑA	261.440	822.681	3.210.613	31,78%	8,14%
BALEARES	19.753	166.301	499.170	11,88%	3,96%
CASTILLA Y LEON	448.680	3.557.687	9.422.372	12,61%	4,76%
MADRID	20.350	207.181	802.749	9,82%	2,54%
CASTILLA-LA MANCHA	553.969	3.709.967	7.946.100	14,93%	6,97%
C.VALENCIANA	291.798	643.855	2.325.913	45,32%	12,55%
R.DE MURCIA	190.027	474.640	1.131.387	40,04%	16,80%
EXTREMADURA	281.059	1.077.728	4.163.442	26,08%	6,75%
ANDALUCIA	1.102.144	3.548.596	8.758.808	31,06%	12,58%
CANARIAS	25.590	43.907	744.510	58,28%	3,44%
Total general	3.774.286	17.013.689	50.594.796	22,18%	7,46%

EL ALMENDRO REPRESENTA UN 4% DEL TOTAL DE LA SUPERFICIE DE CULTIVO EN NUESTRO PAIS.

Tabla 5: Distribución de la superficie regada por cultivos 2013-2018

CULTIVO	2013 ha	2013%2	2014 ha	2014%2	2015 ha	2015%2	2016 ha2	2016%2	2017 ha	2017%2	2018 ha2	2018%
ACEITUNA DE ALMAZARA	679.341	19,19%	682.689	18,94%	694.650	19,10%	711.589	19,47%	729.107	19,53%	746.324	19,77%
UVA DE TRANSFORMACION	332.418	9,39%	342.074	9,49%	355.332	9,77%	355.562	9,73%	368.100	9,86%	378.021	10,02%
MAIZ	447.804	12,65%	429.456	11,91%	401.588	11,04%	338.880	9,27%	309.752	8,30%	326.447	8,65%
CEBADA DE 2 CARRERAS	205.557	5,81%	218.288	6,05%	220.530	6,06%	214.324	5,86%	236.880	6,34%	210.029	5,56%
TRIGO BLANDO Y SEMIDURO	163.380	4,61%	189.977	5,27%	189.920	5,22%	180.362	4,93%	184.870	4,95%	185.498	4,91%
ALFALFA	156.270	4,41%	163.771	4,54%	169.313	4,66%	170.933	4,68%	167.985	4,50%	159.844	4,24%
BARBECHO REGADIO	80.843	2,28%	91.878	2,55%	93.997	2,58%	103.305	2,83%	106.460	2,85%	141.734	3,76%
NARANJO	146.775	4,15%	142.875	3,96%	138.430	3,81%	135.452	3,71%	134.468	3,60%	139.182	3,69%
ALMENDRO	38.818	1,10%	42.969	1,19%	52.990	1,46%	71.333	1,95%	95.455	2,56%	113.679	3,01%
ARROZ	113.638	3,21%	110.785	3,07%	112.631	3,10%	109.749	3,00%	109.617	2,94%	105.717	2,80%
MANDARINO	101.018	2,85%	100.564	2,79%	102.561	2,82%	101.503	2,78%	99.121	2,65%	97.955	2,60%
MELOCOTONERO Y NECTARINA	77.385	2,19%	78.167	2,17%	77.873	2,14%	78.532	2,15%	76.790	2,06%	72.197	1,91%
HUERTOS FAMILIARES	67.019	1,89%	69.965	1,94%	68.852	1,89%	68.153	1,86%	66.959	1,79%	65.252	1,73%
ALGODON	61.110	1,73%	72.143	2,00%	61.622	1,69%	60.278	1,65%	59.413	1,59%	61.689	1,63%
GIRASOL	55.026	1,55%	42.495	1,18%	43.652	1,20%	49.335	1,35%	59.749	1,60%	54.775	1,45%
HUERTO VACIO	46.951	1,33%	41.008	1,14%	40.153	1,10%	39.901	1,09%	39.054	1,05%	51.233	1,36%
LIMONERO	33.489	0,95%	33.960	0,94%	34.890	0,96%	36.956	1,01%	38.616	1,03%	43.123	1,14%
PRADERAS POLIFITAS	44.885	1,27%	41.578	1,15%	39.452	1,08%	40.102	1,10%	40.826	1,09%	40.447	1,07%
REMOLACHA AZUCARERA	33.938	0,96%	37.220	1,03%	36.888	1,01%	31.996	0,88%	40.391	1,08%	38.657	1,02%
ACEITUNA DE DOBLE APTITU	24.137	0,68%	22.635	0,63%	19.659	0,54%	20.088	0,55%	21.673	0,58%	38.309	1,01%
PATATA	43.325	1,22%	42.748	1,19%	40.351	1,11%	45.521	1,25%	47.818	1,28%	34.349	0,91%
ACEITUNA DE MESA	35.695	1,01%	35.187	0,98%	34.400	0,95%	35.246	0,96%	34.079	0,91%	33.871	0,90%
TOMATE INDUSTRIA	18.947	0,54%	23.356	0,65%	31.731	0,87%	36.095	0,99%	35.844	0,96%	31.335	0,83%
OTROS FORRAJES (CEREAL I	41.254	1,17%	40.971	1,14%	26.096	0,72%	39.244	1,07%	41.891	1,12%	30.666	0,81%
TRIGO DURO	30.933	0,87%	26.274	0,73%	51.074	1,40%	53.021	1,45%	52.016	1,39%	29.228	0,77%
OTROS CULTIVOS E INVERNADEROS	460.602	13,01%	482.087	13,37%	497.884	13,69%	527.959	14,44%	536.762	14,38%	544.723	14,43%
TOTAL	3.540.560	100,00%	3.605.121	100,00%	3.636.519	100,00%	3.655.417	100,00%	3.733.695	100,00%	3.774.286	100,00%

PERIODO 2013-2018 (6 AÑOS) INCREMENTO DEL ALMENDRO EN REGADIO

34%

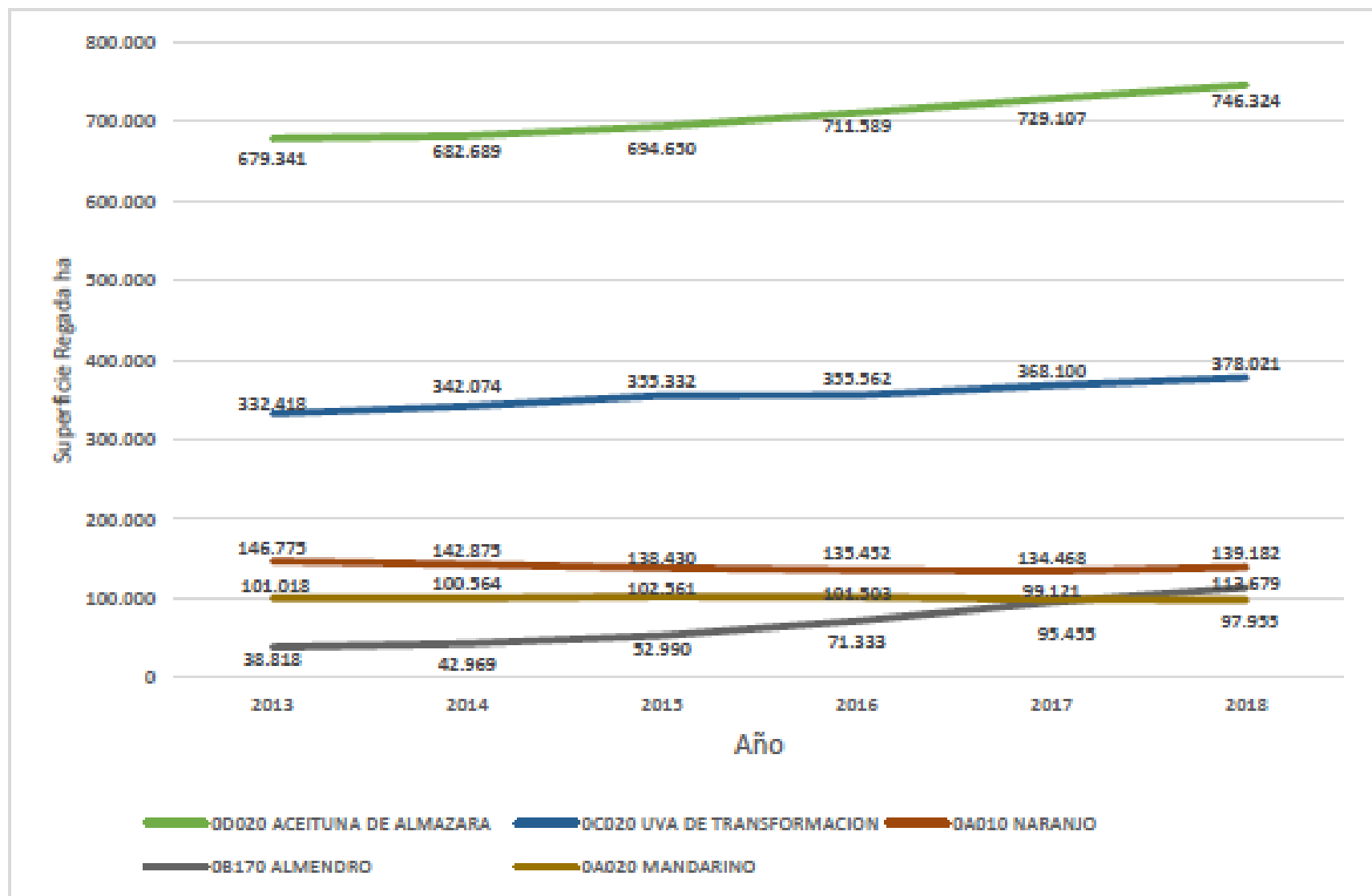
RESULTADOS DE LA ENCUESTA SOBRE SUPERFICIES 2018(ha)^(*)

ESPAÑA

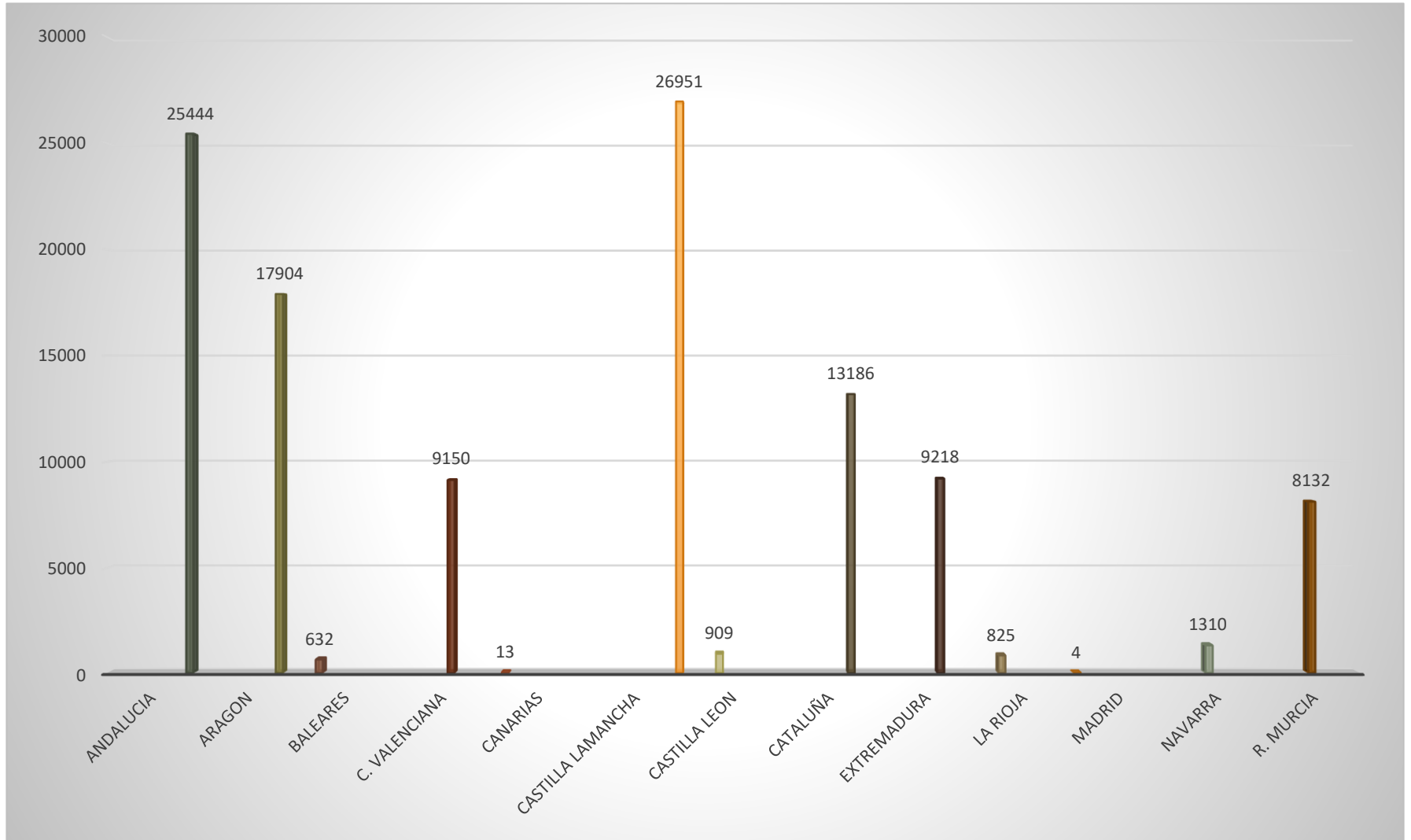
Cultivo o cubierta	Secano	Regadio	Invernadero	Total
BARBECHO	2.887.259			2.887.259
BARBECHO REGADIO		141.734		141.734
BARBECHOS	2.887.259	141.734		3.028.993
NARANJO	10.042	139.182		149.225
MANDARINO	7.528	97.955		105.481
LIMONERO	3.171	43.123		46.294
POMELO	48	1.996		2.042
NARANJO AMARGO	49	386		434
OTROS CITRICOS	12	1.131		1.143
FRUTALES CITRICOS (CI)	20.847	283.773		304.619
MANZANO	12.747	19.751		32.499
PERAL	1.931	17.645		19.575
MEMBRILERO	199	524		723
NISPERO	356	1.440		1.796
ALBARICOQUERO	2.534	21.796		24.330
CEREZO Y GUINDO	19.588	13.792		33.379
MELOCOTONERO Y NECTARINAS	3.874	72.197		76.071
CIRUELO	2.500	10.036		12.535
HIGUERA	17.680	3.526		21.206
CHIRIMOYO	5	2.403		2.408
AGUACATE	810	15.008	10	15.827
CAQUI	619	17.134		17.753
PLATANERA		6.850	3.104	9.953
KIWI	919	830	0	1.750
CHUMBERA	546	269		815
MANGO	434	4.275	269	4.977
GRANADO	293	5.651		5.943
PAPAYA		23	548	571
PIÑA		9	136	145
ALMENDRO	563.650	113.679		677.328
ALMENDRO ABANDONADO	97.493			97.493
ALMENDRO NO COMERCIAL	25.434	711		26.144
NOGAL FRUTO	7.625	6.730		14.356
AVELLANO	8.295	8.121		16.416
CASTAÑO FRUTO	22.795	191		22.986
PISTACHO	15.293	9.670		24.963
FRAMBUESO		1.264	1.783	3.046
OTROS FRUTALES	955	2.164	2.958	6.076
FRUTALES NO CITRICOS (FR)	806.574	355.684	8.807	1.171.066
UVA DE MESA BLANCA SIN SEMILLA	147	1.475		1.622
UVA DE MESA BLANCA CON SEMILLA	1.469	4.997		6.465
UVA DE MESA ROJA SIN SEMILLA	9	3.533		3.542
UVA DE MESA ROJA CON SEMILLA	635	1.528		2.163
UVA DE TRANSFORMACION	582.737	378.021		960.758
VINEDO (VI)	584.997	389.553		974.550
ACEITUNA DE MESA	42.685	33.871		76.556
ACEITUNA DE DOBLE APTITUD	72.367	38.309		110.676
ACEITUNA DE ALMAZARA	1.763.888	746.324		2.510.213
OLIVAR (OL)	1.878.941	818.505		2.697.445

ACTUALMENTE EL ALMENDRO EN REGADIO REPRESENTA EL 17% DEL TOTAL DE LAS HAS

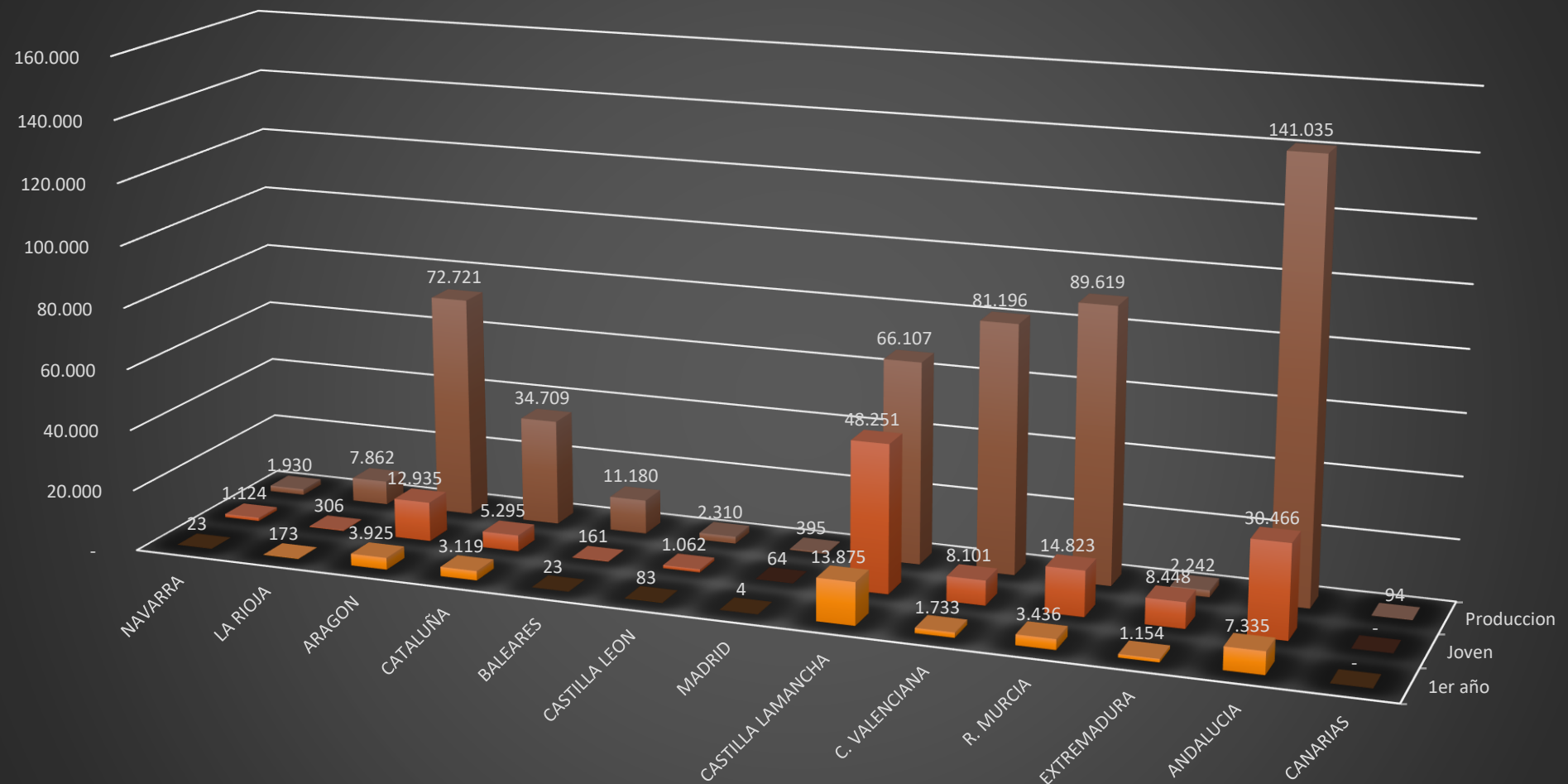
Gráfico 6: Evolución de la superficie regada de Cultivos Leñosos



HAS DE ALMENDRO EN REGADIO X CCAA



TOTAL HAS X CCAA X EDAD DE LA PLANTACION



2017 ALMOND ACREAGE BY COUNTY, BY YEAR PLANTED (Continued) ^{1/}

County	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Acres standing in 2017 ^{2/}		
															Bearing	Non-bearing	Total
Butte	1,535	1,339	1,381	470	611	910	1,464	949	760	332	489	441	794	489	29,915	1,723	31,638
Calaveras	0	0	0	0	0	0	0	0	0	0	0	0	0	0	11	0	11
Colusa	2,682	5,196	3,642	2,027	1,112	2,421	1,094	2,039	985	1,043	1,146	1,588	953	776	41,712	3,316	45,028
Contra Costa	0	0	1	0	0	0	0	0	0	0	0	13	0	40	14	53	67
Fresno	7,646	11,636	11,308	5,017	4,384	3,459	3,851	5,236	4,272	4,299	6,583	8,599	6,098	5,099	114,715	19,797	134,512
Glenn	1,976	1,665	2,979	982	1,188	1,558	823	693	722	901	766	611	936	754	35,148	2,301	37,449
Kern	12,292	20,353	14,423	4,280	5,861	3,827	3,620	6,182	3,619	4,854	4,204	3,955	4,590	4,206	138,080	12,751	150,832
Kings	447	590	1,254	388	807	590	444	245	107	281	284	2,096	718	320	7,712	3,133	10,845
Madera	4,949	4,946	6,407	7,093	6,135	7,343	3,362	3,361	3,566	4,247	4,171	3,353	3,849	2,519	88,218	9,720	97,938
Merced	5,447	6,197	7,123	4,843	4,280	3,071	3,233	2,800	3,511	2,673	3,875	3,930	2,334	3,313	99,177	9,576	108,753
Placer	0	0	0	0	0	0	0	22	0	0	0	0	0	0	46	0	46
Riverside	0	0	0	0	230	0	0	0	0	0	0	0	0	0	230	0	230
Sacramento	0	0	0	0	25	0	0	0	0	0	15	65	253	0	48	318	366
San Joaquin	1,693	1,778	1,359	1,547	1,735	1,194	1,027	1,780	1,533	2,036	1,729	1,808	1,282	1,184	37,376	4,273	41,650
San Luis Obisp	5	0	0	0	0	0	0	0	0	0	0	0	0	0	712	0	712
Santa Clara	0	0	0	0	47	0	0	0	0	0	0	0	0	0	47	0	47
Solano	72	258	298	57	32	144	51	55	32	190	491	391	74	250	3,129	715	3,845
Stanislaus	4,923	9,551	5,373	3,973	5,609	4,247	3,946	3,467	3,981	4,016	3,687	3,257	1,937	2,456	108,720	7,650	116,370
Sutter	238	419	431	181	121	87	277	119	61	52	132	319	37	22	4,579	378	4,957
Tehama	514	364	404	208	136	266	772	180	354	18	371	205	543	459	7,992	1,206	9,198
Tulare	1,175	3,357	2,775	1,305	1,457	1,044	2,037	1,621	1,192	1,269	1,697	2,187	2,053	701	27,723	4,940	32,663
Yolo	1,362	456	513	352	433	474	494	780	501	636	722	1,264	631	113	10,927	2,007	12,934
Yuba	81	0	110	0	19	0	6	30	0	0	25	45	0	23	777	68	844
All Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	4
State Total	47,035	68,104	59,781	32,700	34,222	30,634	26,500	29,560	25,197	26,846	30,386	34,124	27,079	22,722	757,011	83,925	840,936

^{1/} Totals may not add due to rounding.

^{2/} Shaded area represents non-bearing years, 2015-2017.



PRODUCCION DE ALMENDRA

FRUTOS SECOS

ALMENDRO: Análisis provincial de superficie, rendimiento y producción, 2017

Provincias y Comunidades Autónomas	Superficie en plantación regular (hectáreas)					Arboles diseminados (número)	Rendimiento			Producción (con cáscara) (toneladas)		
	Total			En producción			Superficie en producción (kg/ha)		Arboles sembrados (kg/árbol)	En plantación regular	Árboles diseminados	Producción Total
	Secano	Regadío	Total	Secano	Regadío		Secano	Regadío				
PAÍS VASCO	75	-	75	75	-	12.915	850	-	4	63	52	115
NAVARRA	1.998	1.663	3.661	1.946	1.288	4.112	204	2.014	4	2.991	16	3.007
LA RIOJA	8.890	761	9.651	5.462	593	-	352	1.193	-	2.631	-	2.631
ARAGÓN	60.295	12.167	72.462	56.674	9.654	-	525	2.252	-	51.479	-	51.479
CATALUÑA	31.060	7.931	38.991	29.205	7.359	-	361	962	-	17.635	-	17.635
BALEARES	23.822	210	24.032	19.417	210	-	280	810	-	5.607	-	5.607
CASTILLA Y LEÓN	1.646	299	1.945	1.335	25	30.685	401	1.316	-	568	4	572
MADRID	840	-	840	540	-	24.550	830	-	2	453	49	502
CASTILLA-LA MANCHA	96.671	17.838	114.509	65.451	9.329	215.657	199	705	3	19.584	687	20.271
C. VALENCIANA	78.959	12.332	91.291	75.711	10.189	21.100	362	1.505	5	42.747	106	42.853
R. DE MURCIA	69.463	6.900	76.363	64.333	6.355	-	317	1.510	-	29.990	-	29.990
EXTREMADURA	4.300	3.638	7.938	2.421	583	-	598	2.790	-	3.074	-	3.074
ANDALUCÍA	168.905	22.737	191.642	145.052	12.360	52.971	295	2.800	1	77.472	53	77.525
CANARIAS	149	13	162	149	9	203.128	201	1.000	1	39	203	242
ESPAÑA	547.073	86.489	633.562	467.771	57.954	565.118	330	1.727	2	254.333	1.170	255.503

LOS DATOS ESTADISTICOS DE 2017 NOS OFRECEN LA SIGUIENTE MEDIA DE PRODUCCION:

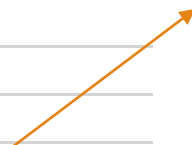
SECANO: $330\text{KG/CASCARA} \times 25\% \text{Rto grano} = 82,5\text{Kg/grano}$

REGADIO: $1.727\text{KG/CASCARA} \times 30\% \text{Rto grano} = 518,1\text{Kg/grano}$

**RESUMEN DE LOS AVANCES DE SUPERFICIES Y PRODUCCIONES AGRÍCOLAS
 TOTALES NACIONALES A ENERO 2019**

CULTIVOS	PRODUCCIONES (Miles de Toneladas)			
		DEFINIT.	PROVIS.	AVANCE
	MES (1)	2017	2018	2019
FRUTALES				
manzana sidra	11	91,3	77,8	
manzana de mesa	11	495,7	515,6	
manzana total		587,0	593,4	
pera total	11	361,0	336,5	
albaricoque	11	162,9	183,9	
cereza y guinda	11	114,4	110,2	
melocotón (12)	9	1.081,2	811,1	
ciruela	11	172,3	147,7	
plátano	11	421,3	387,5	
higo	10	36,4	45,7	
kiwi	12	21,5	26,4	
aguacate	1	92,9	92,1	
nectarina	10	718,5	565,9	
nuez (13)	11	15,7	16,8	
castaña	12	156,2	158,3	
frambuesa	6	43,5	35,0	
almendra (13)	11	243,9	316,6	
avellana (13)	11	10,5	4,9	
(13) TM/CÁSCARA				

26%Rto
82.000Tm





Almond Board of California Almond Board
Quality Control Receipts Report
Industry Summary
August 1, 2017 through July 31, 2018

Variety Name	From ABC Form 1 Total Receipts	From USDA Inspection Certificates		% of Total Receipts	% Rejects
		Total Receipts	Total Inedibles		
Aldrich	71,880,726	71,298,971	1,945,960	3.18%	2.73%
Avalon	6,978,773	6,930,659	387,660	0.31%	5.59%
Butte	93,886,142	94,756,339	1,505,364	4.15%	1.59%
Butte/Padre	244,435,855	243,452,254	3,216,213	10.81%	1.32%
Carmel	133,528,575	131,795,696	3,317,144	5.91%	2.52%
Carrion	376,825	315,162	6,843	0.02%	2.17%
Folsom	1,423,402	1,419,532	28,035	0.06%	1.97%
Fritz	107,806,185	107,642,159	2,907,864	4.77%	2.70%
Hash	10,454,910	4,014,106	408,105	0.46%	10.17%
Independence	57,396,455	57,710,276	1,363,951	2.54%	2.36%
Livingston	5,497,755	5,452,877	154,135	0.24%	2.83%
Marcona	2,121,283	2,099,702	34,482	0.09%	1.64%
Merced	17,065	48,621	896	0.00%	1.84%
Mission	10,921,576	11,150,905	95,155	0.48%	0.85%
Mixed	37,082,333	49,681,430	4,080,320	1.64%	8.21%
Mono	198,745	201,141	11,528	0.01%	5.73%
Monterey	365,850,004	365,591,091	10,245,328	16.18%	2.80%
Morley	534,245	599,581	8,092	0.02%	1.35%
Neplus	765,403	721,760	37,132	0.03%	5.14%
Nonpareil	918,493,847	921,558,812	21,259,629	40.63%	2.31%
Padre	33,656,580	33,755,757	224,190	1.49%	0.66%
Peerless	4,034,578	4,013,201	42,785	0.18%	1.07%
Price	20,738,455	19,579,548	384,865	0.92%	1.97%
Ruby	2,331,874	2,329,740	40,614	0.10%	1.74%
Savana	280,864	136,739	3,176	0.01%	2.32%
Sonora	31,499,807	30,579,662	1,081,416	1.39%	3.54%
Supareil	4,052,589	4,037,234	95,259	0.18%	2.36%
Thompson	509,136	209,542	6,702	0.02%	3.20%
Tokyo	380,013	374,886	5,582	0.02%	1.49%
Winters	9,405,649	9,396,628	387,362	0.42%	4.12%
Wood Colony	82,321,002	81,336,101	1,498,884	3.64%	1.84%
Major Varieties Sub Total	2,258,860,651	2,262,190,112	54,784,671	99.93%	2.42%
Minor Varieties Sub Total	1,615,560	1,469,800	49,834	0.07%	3.39%
Grand Total All Varieties	2,260,476,211	2,263,659,912	54,834,505	100.00%	2.42%

This report is subject to further verification of handler's receipts
and further reconciliation of USDA Incoming Certificates

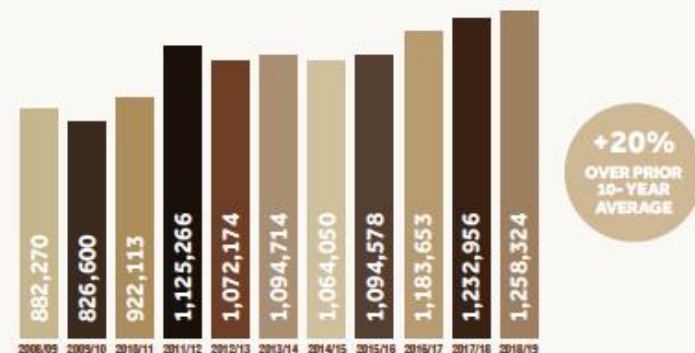
ALMONDS

PRODUCTION

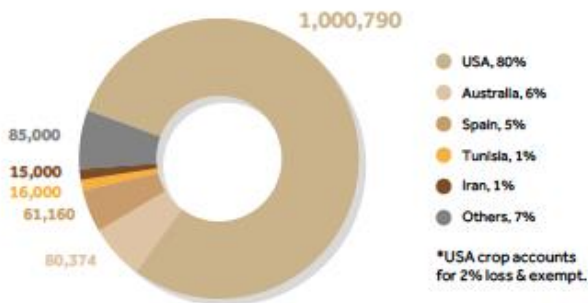
Almond production continues to grow year on year. During the 2018/2019 season the almond world crop was increased by 2% from the prior season and 20% from the previous 10-year average, amounting to over 1.25 million metric tons (kernel basis).

Representing 80% of the world share in 2018/19, the USA keeps leading the world production, followed by Australia and Spain with 6% and 5%, respectively. The Australian crop has been steadily increasing during the last decade and it is now 33% above the prior 10-year average. In turn, Spanish crop has significantly risen from last season, up 15% from around 53,000 metric tons to over 61,000 MT.

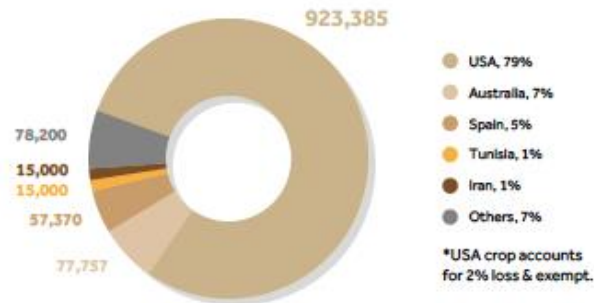
WORLD ALMOND PRODUCTION
Kernel Basis (Metric Tons)



2018/19 ALMOND PRODUCTION
Kernel Basis (Metric Tons)



5-YEAR AVERAGE ALMOND PRODUCTION
Kernel Basis (Metric Tons)





VARIETADES DE ALMENDRA

VARIETADES DE ALMENDRA CULTIVADAS EN ESPAÑA

ANTOÑETA

ATOCHA

AYLES

BERTINA

BELONA

BLANQUERNA

CAMBRA

CARTAYERA

CRISTOMORTO

COLORADA

CONSTANTI

D. LARGUETA

D. ROJO

ESPERANZA

FELISIA

FERRAGNES

FERRADUEL

FILIPPO CEO

FRANCOLI

GARRIGUES

GLORIETA

GENCO

GUARA

JORDANA

JORDI

LAURANNE

MAKAKO

MANDELINÉ

MARCONA

MARDIA

MARINADA

MARTA

MASBOVERA

MONCAYO

PENTA

PERALEJA

PESTAÑETA

PLANETA

RAMILLETE

ROF

RUMBETA

SOLETA

STELIETTE

TARDONA

TUONO

VAIRO

VIALFAS

VIVOT

.....

ALMOND ACREAGE AS OF 2017 - VARIETIES AND AGE GROUPS - STATE SUMMARY

ACREAGE PLANTED DURING YEARS SHOWN AND STANDING IN 2017 (Continued) ^{1/}

Variety	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Acres standing in 2017 ^{2/}		
															Bearing	Non-bearing	Total
Aldrich	1,781	2,272	1,504	639	1,080	1,300	1,372	1,348	1,349	1,663	1,543	1,684	1,129	910	23,648	3,723	27,371
Avalon	393	409	431	134	76	152	64	120	17	0	12	28	5	2	3,260	35	3,295
Bennett	0	0	0	0	44	0	0	27	0	0	0	0	17	159	71	176	247
Butte	3,701	8,288	8,162	4,784	4,082	1,694	732	511	485	604	540	430	832	558	79,256	1,821	81,076
Carmel	4,715	4,026	3,606	1,969	1,516	1,930	1,439	1,281	1,221	1,365	1,059	1,060	430	607	73,257	2,097	75,353
Drake	0	0	0	0	0	0	0	0	0	0	0	0	0	0	129	0	129
Folsom	0	0	56	10	19	28	142	291	54	123	0	0	1	0	728	1	729
Fritz	3,381	5,095	4,219	2,561	1,731	1,418	1,407	1,210	940	895	428	545	174	280	39,100	998	40,098
Hashem	40	22	12	0	0	0	0	0	20	0	19	0	0	0	370	0	370
Independence	44	0	104	9	40	206	502	1,498	1,844	2,193	3,068	6,565	6,256	5,302	9,895	18,123	28,018
Kapareil	0	0	0	0	0	0	0	0	0	0	0	0	0	0	223	0	223
Livingston	39	45	131	113	217	5	0	0	0	8	33	2	1	0	1,978	3	1,981
Marchini	41	0	976	0	0	0	0	0	13	0	0	0	0	0	1,253	0	1,253
Marcona	0	42	12	10	0	25	0	0	0	60	0	0	0	0	149	0	149
Merced	7	0	0	0	0	1	0	0	0	0	0	0	0	0	391	0	391
Mission (Texas)	50	105	207	76	1	135	69	14	16	137	23	21	50	63	9,790	134	9,924
Mono	0	0	0	0	0	1	0	0	0	0	1	0	0	0	148	0	148
Monterey	7,776	11,521	9,988	5,696	6,333	6,763	4,703	6,125	4,588	4,592	5,722	5,719	4,588	3,026	100,544	13,333	113,877
Morley	0	0	0	0	0	0	9	0	0	0	0	44	0	0	318	44	362
Ne Plus Ultra	47	6	18	2	47	60	260	20	72	16	71	0	5	9	1,901	14	1,915
Nonpareil	20,555	25,939	20,395	10,302	12,744	13,518	12,003	13,402	11,677	11,796	13,408	13,905	10,854	8,235	292,250	32,993	325,243
Padre	2,179	6,668	6,996	4,319	3,221	1,082	482	247	230	288	168	156	338	322	51,750	816	52,566
Peerless	66	94	51	58	73	107	72	179	56	33	57	42	16	10	4,361	67	4,428
Price Cluster	351	679	508	458	624	194	290	364	124	262	175	103	51	147	13,203	302	13,504
Ruby	10	77	5	9	0	1	9	0	0	2	1	0	0	47	1,864	47	1,911
Savana	0	0	0	0	0	0	0	0	0	0	0	0	0	0	321	0	321
Shasta	0	0	0	1	0	0	0	0	0	0	0	30	495	871	1	1,396	1,397
Sonora	477	887	246	147	562	157	637	584	351	387	349	408	257	184	15,852	849	16,701
Supareil	0	2	0	0	0	50	248	185	152	143	495	889	269	117	1,312	1,255	2,568
Thompson	0	0	1	0	0	16	0	0	0	0	0	0	0	0	597	0	597
Tokyo	31	13	3	0	0	0	0	0	0	0	0	0	0	0	306	0	306
Winters	459	672	655	201	483	386	418	167	81	70	188	298	120	49	4,118	467	4,585
Wood Colony	747	1,032	1,258	523	939	1,247	1,042	1,889	1,424	2,147	2,697	1,970	1,070	839	19,786	3,878	23,663
All Others	146	230	241	681	390	158	600	301	483	63	329	244	123	988	4,889	1,355	6,244
State Total	47,035	68,104	59,781	32,700	34,222	30,634	26,500	29,560	25,197	26,846	30,386	34,124	27,079	22,722	757,011	83,925	840,936

^{1/} Totals may not add due to rounding.

^{2/} Shaded area represents non-bearing years, 2015-2017.

ALDRICH		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, good shell integrity, fair suture opening							
	CLASSIFICATION California type, Carmel type	CHARACTERISTICS Long and flat						

BUTTE		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Semi-hard shell, light color, smooth surface, low suture opening							
	CLASSIFICATION California type, Mission type	CHARACTERISTICS Short and plump/round						

CARMEL		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, good shell integrity, fair suture opening							
	CLASSIFICATION California type	CHARACTERISTICS Long and flat						

FRITZ		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Semi-hard shell, good shell integrity, low suture opening							
	CLASSIFICATION California type, Mission type	CHARACTERISTICS Short and plump/round						

INDEPENDENCE		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, light color, high suture opening							
	CLASSIFICATION Nonpareil type, California type	CHARACTERISTICS Long and flat						

MARCONA		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Hard shell, very thick, dark color, no suture opening							
	CLASSIFICATION Mission type, Other type	CHARACTERISTICS Short and plump						

MONTEREY		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Hard shell, smooth surface, low suture opening							
	CLASSIFICATION California type	CHARACTERISTICS Long and flat						

NONPAREIL		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, light color, high suture opening							
	CLASSIFICATION Nonpareil type	CHARACTERISTICS Long and flat						

PADRE		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Hard shell, good shell integrity, no suture opening							
	CLASSIFICATION California type, Mission type	CHARACTERISTICS Short and plump/round						

FRICE		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, dark brown color, rough surface, high suture opening							
	CLASSIFICATION California type	CHARACTERISTICS Long and flat						

SONORA		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, dark brown color, rough surface, high suture opening							
	CLASSIFICATION California type, Nonpareil type	CHARACTERISTICS Long and flat						

WOOD COLONY		18/20	20/22	23/25	25/27	27/30	30/32	32/34
	SHELL Soft shell, good shell integrity, fair suture opening							
	CLASSIFICATION California type, Carmel type	CHARACTERISTICS Long and flat						



MERCADOS

INDUSTRIA

TURRONEROS, CHOCOLATEROS, TOSTADORES
DEMANDAN PRODUCTO HOMOGENEO
CONSUMO ESTACIONAL
CONTRATOS DE SUMINISTRO PARA LA CAMPAÑA



DISTRIBUCION

MAYORISTAS

DISTRIBUYEN EL PRODUCTO A MINORISTAS O ENVASADORES
PRECIOS COMPETITIVOS
PEDIDOS CADA VEZ MÁS PEQUEÑOS. STOCK O.

MINORISTAS

DISTRIBUYEN EL PRODUCTO A OBRADORES, REPOSTEROS, ETC
PRIMAN LA CALIDAD
PRIMAN EL ORIGEN
CONSUMO MUY ESTACIONAL



GRAN DISTRIBUCION

GRANDES CADENAS DE LA DISTRIBUCION
CONTRATOS MUY EXIGENTES
FIJACION DE PRECIOS A L/P
GARANTIA DE SUMINSTRO
PRODUCTO HOMOGENEO
GRANDES CONSUMOS ANUALES





CONSUMO

CONSUMO PAIS 2013-2018

Domestic Consumption	2013/14	2014/15	2015/16	2016/17	2017/18	Oct 2018/19	% sobre 6 años
European Union	323.800	308.700	346.700	374.700	392.800	403.500	25%
United States	305.580	274.851	283.064	337.345	366.314	384.146	26%
China	67.700	57.800	87.500	107.200	125.000	113.000	67%
India	56.300	64.800	84.900	90.000	91.500	107.500	91%
Japan	36.200	38.100	29.300	31.500	37.000	42.000	16%
United Arab Emirates	54.800	61.500	35.000	36.500	38.400	42.000	-23%
Canada	33.700	35.000	32.800	35.500	35.600	40.000	19%
Turkey	33.200	30.800	28.300	35.200	33.800	30.000	-10%
Korea South	25.800	25.800	22.100	25.600	24.100	28.000	9%
Australia	20.800	25.000	28.300	30.200	28.100	24.400	17%
Other	92.000	75.300	73.800	90.400	83.200	107.700	17%
Total	1.049.880	997.651	1.051.764	1.194.145	1.255.814	1.322.246	26%
% s/año anterior		-4,97%	5,42%	13,54%	5,16%	5,29%	

PR Campaign Model



Consumer Education Program: Sharing More Nutritional Benefits

Almonds: an amazing food

- Global cultural heritage
- Nutrient rich
- Substantiated health
- Convenient
- Portable
- An ingredient and a snack
- Tasty and crunchy
- Versatile



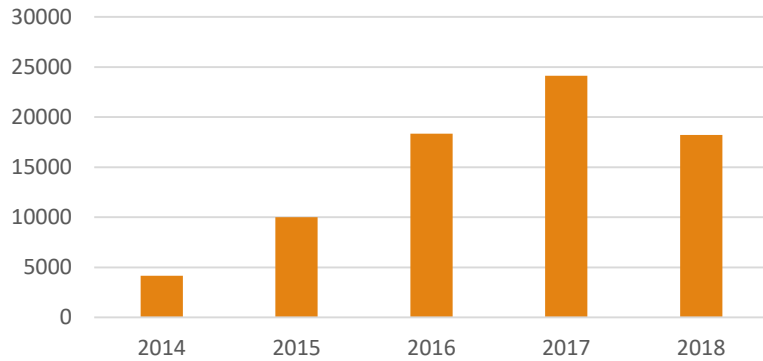


PERSPECTIVAS

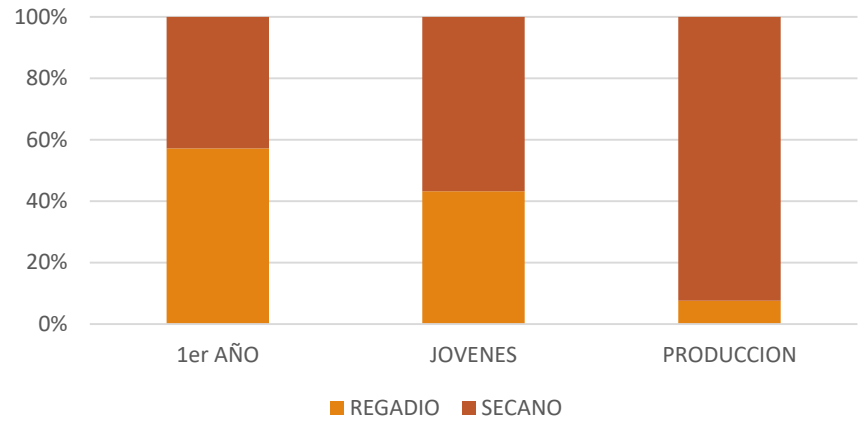


EFFECTIVOS PRODUCTIVOS

NUEVAS HAS REGADIO

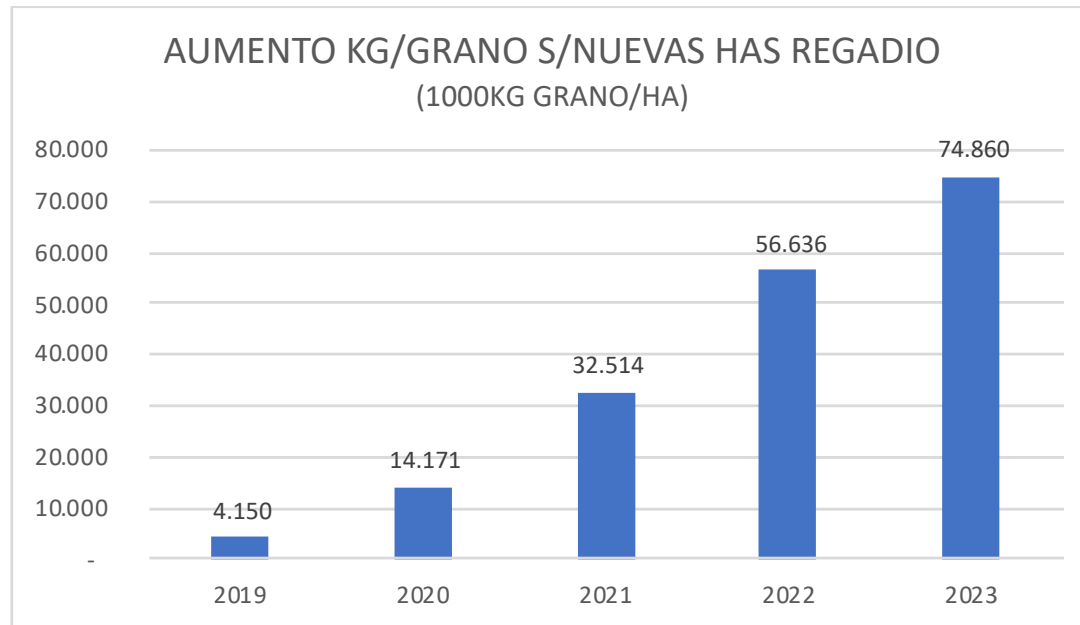


HAS REGADIO S/AÑO PLANTACION



NUEVOS REGADIOS MAYORES PLANTACIONES DE ALMENDRO

PRODUCCION ALMENDRA GRANO



FALTA INFORMACION

VARIEDADES

VARIEDADES DE ALMENDRA



CONDICIONES ORGANOLEPTICAS

MAYORES PRODUCCIONES

MEJORA EN LA PERCEPCIÓN VISUAL



EXCESO DE VARIEDADES

DESCRIPCION TIPOLOGIA DE LA ALMENDRA ESPAÑOLA

NO HOMOGENEIDAD DEL FRUTO

MERCADO



.- INFORMACION DEL MERCADO DE ALMENDRA ESPAÑOLA

- STOCK
- COSECHA ENTRADA
- VENTA EFECTUADA
 - MERCADO DOMESTICO
 - EXPORTACION
- CONTRATOS DE VENTA

.- PRECIOS POR DEBAJO DE LA ALMENDRA AMERICANA / AUSTRALIANA
PARA PODER VOLVER A METER NUESTRO PRODUCTO A LOS CLIENTES



FALTA TODO POR HACER

OTROS SECTORES (ACEITE, VINO, LECHE, ETC) YA LO ESTAN HACIENDO

CONSUMO



CRECIMIENTO CONSTANTE (5% ANUAL)

FUERTE POTENCIAL DE CRECIMIENTO

SUPER ALIMENTO

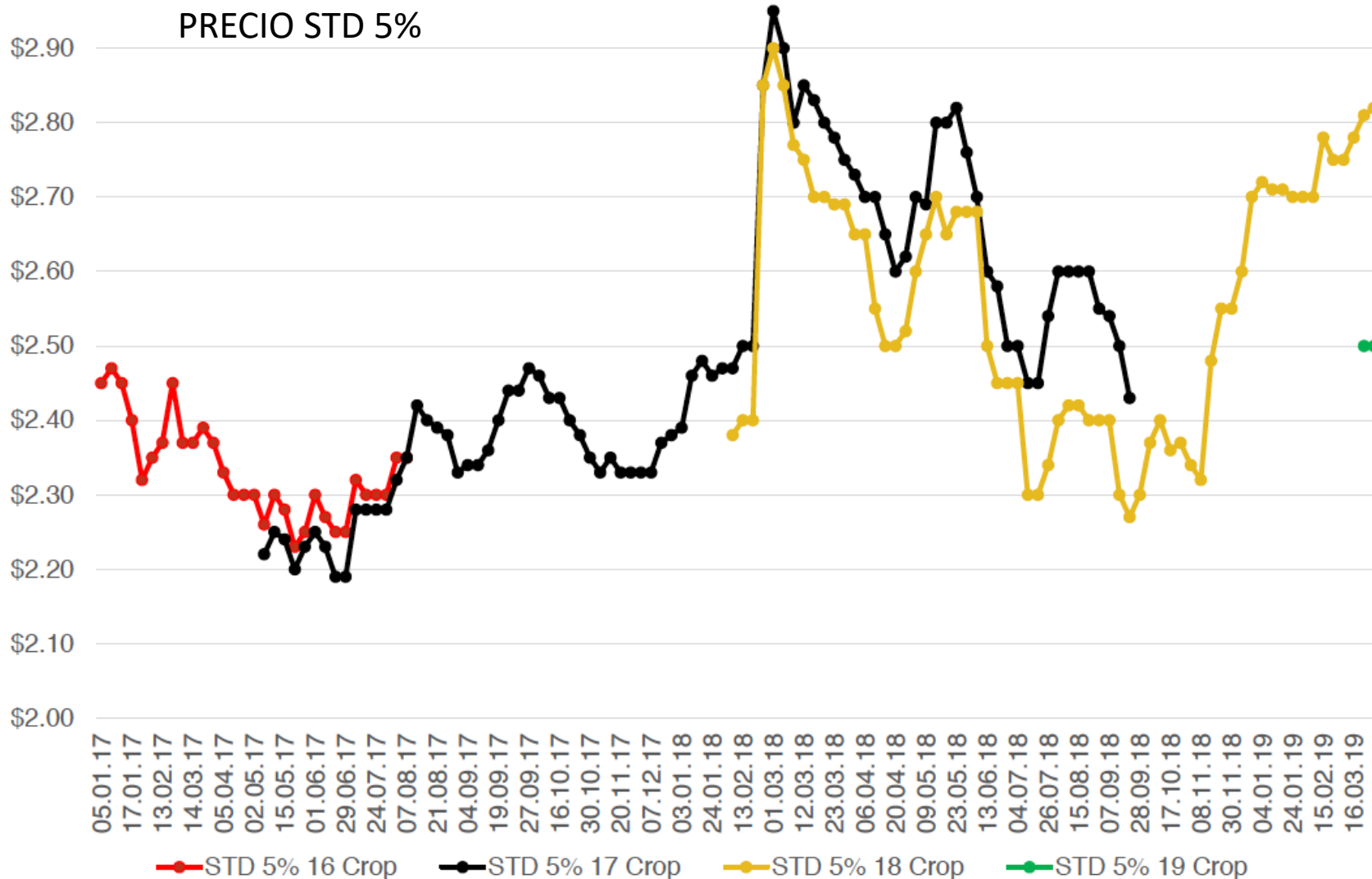


PROMOCION COMERCIAL

MARKETING

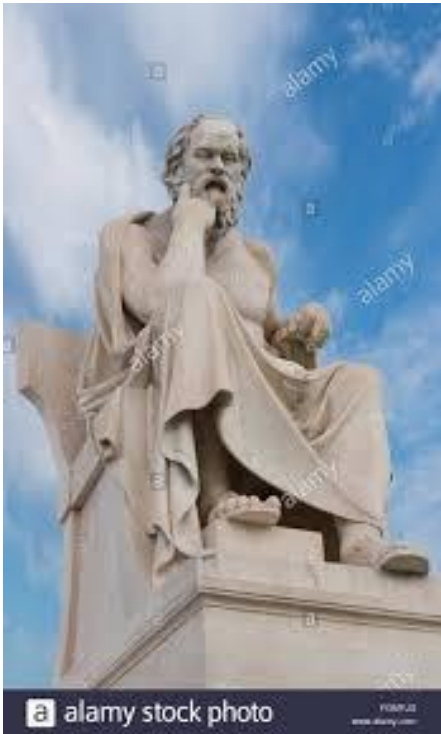
COMUNICACIÓN

INFORMACION DE MERCADO (DÍA 4 DE ABRIL DE 2019)



PARA TERMINAR.....

LES INVITO A REFLEXIONAR SOBRE LO EXPUESTO EN MI PRESENTACIÓN CON ESTA CITA:



“El comercio no trata sobre mercancías, trata sobre información. Las mercancías se sientan en el almacén hasta que la información las mueve.”

C. J. Cherryh

MUCHAS GRACIAS

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