

**ORIENTATION TOWARDS THE
INTERNATIONALIZATION:
THE CASE OF THE OLIVE OIL
SECTOR IN ALMERÍA**

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1. BACKGROUND AND OBJECTIVES

From a learning approach we analyze the evolution or changes of the internal organizational structure for some international companies who belong to the Olive Oil sector in Almería. The objective is to analyze its managerial activities, in order to make some proposals about other alternatives and incremental improvements.

Principally, this project has been carried out besides to study such an important business for our region and its particularities in our region thus it is a latest development in a market already full of competitor from other regions. This work analyses the exporting dynamics leaded by Almería's olive oil companies during the latest years, described by means of economic and sectorial conditions.

The weakened Spanish market situation has forced a growing number of companies to almost remove their business from the local market and place them abroad, where they can find attractive opportunities. Nowadays within the international market we can see many companies which have precious little global representation and mainly are focused on specific market niches or segments. In sum, international expansion is based on the capability of the firm to exploit its local advantages in foreign markets. On the contrary, the lack of strategic resources and the uncertainty and complexity of the process make international expansion a difficult goal to achieve. Even though these barriers, over the past few years many companies located in Almería have decided to go abroad in order to improve their business and to compensate the low internal demand. This challenging adaptation is quite interesting regarding to the tough continuous challenges which have been overcome and also the main changes happened within their organizational structure. What is more interesting is the little olive tradition of our region, still relatively young and under-represented nationally which shows good commercial arts performed by our entrepreneurs Almería who at the appropriate time saw a significant business opportunity in the export of this product.

The growth of real flows between countries which characterizes the world economy poses significant challenges and opportunities for businesses. Globalization brings higher international competition on the local market, thus calling into question

the viability of those companies that are not able to afford a high level of economic rivalry. On the other hand, it promotes the innovation, specialization and exploitation of economies of scale, to facilitate contact with potential partners and customers located anywhere in the world.

For the development of this project have been interviewed in depth in order to obtain relevant primary information that could hardly be obtained through secondary sources. To collect all this primary information I have conducted many interviews for every company which I have taken under consideration for this analysis. Given the "private" character of this information, at the interviews were the less structured and aimed than could be possible but also the interviewees were given one questionnaire in order to provide inspiration and conduction towards the desire results. The questions were open-ended and allowed deepen certain aspects relevant to the investigation. In total, five personals interviews (telephone conversation) to international managers have been carried out aimed at companies producing extra virgin olive oil that operate internationally.

The statistical data used in this research comes from a variety of sources that can be divided in two blocks. The first one contains documentation prepared and published by various public major organizations, which identifies the aggregate behavior of the production and export of olive oil in Almería, Andalusia and the whole state. The second block comprises information from companies that have been surveyed for performing the analysis; this information was qualitative, using in-depth interviews as data collection techniques.

2. SECTOR ANALYSIS

2.1. THE FOOD INDUSTRY IN SPAIN

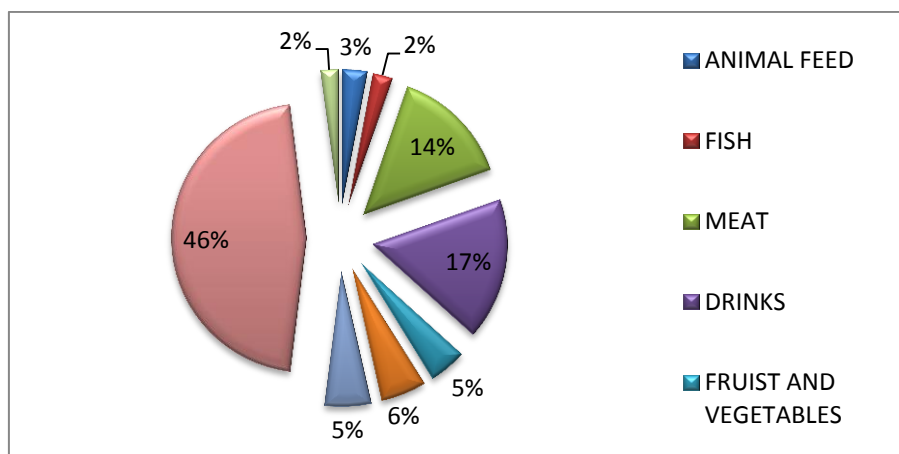
The food industry in Spain involves almost 10% of the GDP national and its selling's takes practically the 25% of the total industry selling's. In this sector there are more than 30,600 companies and the majority of those companies are SMEs with less than 50 employees. Specifically more than the 80% of food companies have less than 10 employees and only the 0.76% of them have more than 200 employees.

The food industry is undoubtedly a solid sector in Spain, even with this deep crisis that we have been experiencing during the last exercises. Therefore, the crisis has not affected to its development and nowadays it is considered as one of the most important parts of the Spanish economy due to its contribution to the total incomes.

The net sales of products of the food industry amounted to € 83,773 million during 2011 according to the FIAB, the Spanish Food and Drink Industry Federation, up by 1.8 % on the previous year. For the agricultural sector, the value of agricultural production amounted to 41,176.8 million euros (current), 3% more than in the previous year.

The Figure 1 shows the food and drinks distribution according to each subsector in 2011. As we can notice the oil subsector has a relevant importance within our industry food with a 6% and remain outstanding ranking fourth in the general distribution. Undoubtedly, the olive oil represents mostly this percentage although also includes other oils such as sunflower oil, etc.

FIGURE 1. FOOD AND DRINKS SUBSECTORS



Source: FIAB the Spanish Food and Drink Industries' Federation 2011

2.2. HISTORICAL TRADITION BEHIND OLIVE CULTIVATION

Since ancient times and until recent years the olive tree has been characterized by little evolution in cultivation techniques. The traditional olive has been a system in equilibrium from the ecological point of view where the olive was complemented with other crops such as legumes and vines, as well as livestock. The species of animals living in this type of farming systems controlled the occurrence of pests and diseases.

Maintenance of olive was done by the farmers themselves, so that payment, plus animal manure is produced from the remains of pruning olive trees themselves. These features have made the traditional olive cultivation on a sustainable model.

Within the **traditional olive** is usually set two types: **the traditional olive not machinable**, low profitability and the traditional olive machinable, with a higher return than the previous type. The traditional not olive machinable located in areas with steep slopes and an average altitude of 1000 meters. Their farms are hardly machinable due to orographic and climatological situation. They are scattered farms often fall hectare. Its future involves the abandonment of the field, once it is unlikely its suitability for other crop. However, this type of olive is high landscape value and contributes to the maintenance of ecological balance of soils and vegetation.

Regarding the organization of work, it should be noted that the main task is the work of harvesting the olives; it has employed a large number of workers / as. Traditionally, this task is performed manually by what is called the shaking of the olive trees: with wooden sticks. The salary level was extremely low, which made them profitable in monetary terms to onset of mechanization in the 60s. In that decade there were major changes in the regulatory framework of working conditions which resulted in a reduction of the working day or the introduction of additional measures in order to improve working conditions, representing a rising cost of labour cost. The second type of traditional olive is machinable, mostly planted on dry land, but sometimes irrigated. This type of surface has a dimension of between 70-100 of olives trees per hectare and these trees may have 2-3 feet. Furthermore, its vast dimension makes difficulty the mechanization and thus lowers yields. This is offset by a subsidy system of the Common Agricultural Policy of the EU to the / the olive growers / as. It's the usual crop of great tradition olive areas, like much of Jaen, Cordoba, Seville,

Granada, etc. Concerning its economic assessment must distinguish between non-irrigated and irrigated land by presenting a different cost structure and hence returns.

Thus, in the case of dry farming, it has an average yield of 3,500 kg per hectare olive with a fairly high unit cost of 0.41 € per kilo, and a cost of 2.20 per kilo of oil. Although its cost is substantially lower than for traditional non-machinable olive (0.86 €/kg), profitability remains weak, depending on the subsidy (1.06 €/kg) for a profit of 0, 58 €/kg. For a profit of 20% on costs, the price threshold should be 2.64 € / kg.

The traditional olive machinable under irrigation has an average yield of 6,000 kilograms per hectare olive with a unit cost of 0.37 €/kg, but shows a lower percentage of pruning and maintenance costs relative to dry farming. Also, in its cost structure, 20% is for irrigation, which accounts on average € 434 per hectare.

The low profitability of these models of production is maintained thanks to the aid of the CAP (Common Agricultural Policy of the European Union). It must be pointed that this system was specially promoted after 1986, with the entry of Spain into the European Economic Community. The European action program basically continued with the measures that the Spanish government had previously applied. It promoted the increase in productivity and in particular olive productivity of large farms, on the basis of a direct aid to production, a system of intervention prices and export subsidies.

2.3. OLIVE OIL, GENERAL FEATURES

The olive oil and table olives have a key place in the traditional Mediterranean diet so reputed for its healthiness. The olive's crop is very common in the Mediterranean region due to the importance of olive oil and table olives within the traditional Mediterranean diet which is so famous for its healthiness, thus its unique composition of nutrients and non-nutrients provides significant beneficial effects on the cardiovascular system, the blood lipid profile and reduces oxidative stress.

Due to its important benefits, have been created a lot of alternatives uses:

- Gastronomy: oil as an ingredient priority.
- Culture and Landscape: tourism and routes Olive oil
- Health and beauty: Oil therapy and cosmetics.

In Spain there are more than 260 varieties of olive trees that make both mono-varietal as mixtures that allow, as in the large wine flavors associated complementary qualities and different varieties. This variety of olives produced in Spain is combined with the great variety of existing microclimates throughout the country to produce an extensive variety of oils. For example, the Picual variety of olive, characteristic of the mountainous regions of Granada, produces oils with body, sweet with a light bitter flavor, while the Hojiblanca variety of olives from Málaga produces sweeter oils, with a light spicy flavor.

Taking into account the different kinds of oils which can be found in the market:

- Extra virgin olive oil. The highest quality of olive oil. Its acidity level is less than 1 % and is rich in antioxidants. It is achieved by first cold pressing of freshly picked olives. It is greenish golden to bright green in color and has a strong aroma and taste. High heat cooking inhibits it of nutritional value, flavor and aroma.
- Virgin olive oil: It is slightly inferior to extra virgin olive oil. The main difference between the two oils is that virgin olive oil has an acidity level around 2.0%.
- Olive oil: It is a blend of refined olive oil and extra virgin olive oil. Pure olive oil has the acidity level around 2.0%, but it is very low in nutritional value in comparison to extra virgin olive oil.
- Olive pomace oil. It is very similar to olive oil. When all the oil and water is extracted from olives, there is still some oil residue left that can be extracted from olive pomace. This oil extracted from olive pomace carries none of the nutrition's, taste and aroma of extra virgin olive oil.

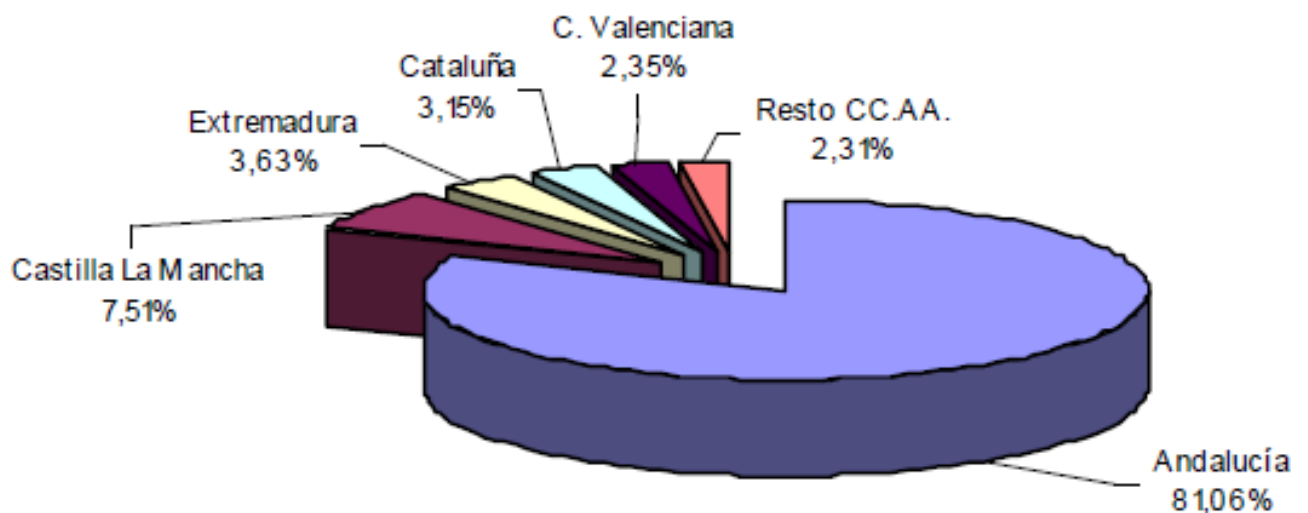
This project is focused on the extra virgin olive oil, mainly, due to its importance in our target market (Almería).

By other hand, Spanish olive oil is subject to a strict quality control. Producers themselves carry out analysis in their own laboratories, and Spanish authorities take

samples from each batch and analyzed to verify that all fits quality requirements set by the European Union.

On account of its exceptional geographical and the course of its history, Spain is the world's top producer and exporter of olive oil and table olives; in addition it has the largest olive orchard acreage. After cereals, olive's crop is the second largest crop in Spain and its production potential is estimated at over one and half millions Ton of olive oil. By other hand, this sector is quite concentrated in several regions (34 of the country's 50 provinces), especially in Andalusia, where around the 81.6% of olive oil is produced. Without forgetting the strong concentration in the southern half of the peninsula, there are other regions at a great distance such as Castile-La Mancha (7.5%), Extremadura (3.63%) and Catalonia (3.15%). This fact is demonstrated in both Figures below (Figure 2 and 3).

FIGURE 2. OLIVE OIL PRODUCTION BY REGION



Source: ICEX – Instituto Español de Comercio Exterior, 2012

FIGURE 3. NUMBER OF OLIVES AND HECTARES BY REGION

REGIONS	Olive´s number	Hectares	%
Andalucía	174.788.000	1.515.320	60,38
Extremadura	29.602.000	255.310	10,17
Castilla La Mancha	36.263.000	397.173	15,83
Cataluña	14.307.000	116.112	4,63
Comunidad Valenciana	10.963.000	91.701	3,65
Aragón	5.889.000	57.346	2,28
Resto	10.884.000	76.715	3,06
TOTAL	282.696.000	2.509.677	100

Source: Ministry of Agriculture, food and environment 2011

The primary macro magnitudes used for characterising and assessing Spanish olive production are as follows:

- ✓ Olive growing area: 2,456,719 ha
 - Mill olives: 2,359,480 ha
 - Table olives: 97,239 ha
 - Unirrigated land: 1,941,252 ha
 - Irrigated land: 515,467 ha
- ✓ Number of olive trees: 282,696,000
 - Mill olive trees: 264,321,000
 - Table olive: 18,375,000
- ✓ Direct employment: 32,000,000 days paid work
 - Harvest: 16,650,000 days paid work
 - Other tasks: 15,350,000 days paid work

From an economical point of view, Regarding to the Olive oil produced in 2011/2012 amounted to 1.6071 million tons, representing a production record for Spain and above at over 200,000 tons from the previous season. In addition, the following Figure 4 shows the progressive growth since 2005 of the olive production.

FIGURE 4. OLIVE PRODUCTION (TABLE AND OIL-PRESS)

	2003	2004	2005	2006	2007	2008	2009	2010
Total	7,553.6	5,200	4,021.7	5,679	6,140.3	5,405.3	6,972.1	7,197.6
Table olives	498.5	455.4	375.4	395.7	438.6	396.4	489.4	515.6
Oil-press olives	7055.1	4,744.6	3,646.3	5,283.3	5,701.7	5,008.9	6,482.7	6,682

Units: Thousands of tonnes

Source: Ministry of Agriculture, food and environment 2011

The olive Spanish sector presents is really complex because of its value chain in which base we can find more than 2 million of agricultural exploitations are centered preferably on olive-growing. The second level contains the mills in which around 947 are cooperatives according to the Olive oil Agency 25, October.

Structurally speaking, Spain's olive oil sector is organized in highly stratified operational levels of activity, which are very specialized and efficient although the functional relations between immediate levels are difficult and complex. A process of gradual concentration is observed in the links in the chain: while the production sector is very fragmented and displays poor management and negotiating capacity, the distribution sector is becoming more and more concentrated.

The processing and distribution sector is concentrated in few companies, and the large-scale distribution is taking most of olive oil sales to household consumers, meaning that the remaining distribution channels are being pushed into the background.

Consequently, the primary olive sector operates in a generic strategic frame in quasi-perfect competitiveness, whereas the refiner-processor and the distributor work in an ever more concentrated environment, which grants them a significant market power. The pressure posed by the reduction of trade margins in large-scale distribution is getting to the lowest links of the chain, and making it difficult for the extraction industry and olive producers.

If we try to separate the final manufacturing from the final total sales of the food industry, mainly it stands out the contribution of the olive oil sub industry. In general terms, the food sector sets intensive connections with the agricultural sector, and therefore it sets a parallel operational system.

The main working areas of this industry are:

- The mills which are dedicated to obtaining extra virgin olive oil.
- The refiners which are focus on the olive oil refining.
- The packing manufactures which are dedicated to the olive oil packing.
- Packing plants “Entamadoras” olive table industry, which are dedicated to the olive gathering and packing.

From the legal viewpoint, olive oil mills in Spain are primarily of two types:

1. Cooperatives or agricultural partnerships: these crush the olives for their members and account for 55% of the total. In the 2007/08 season they produced approximately 70% of all the oil made.
2. Privately owned mills (sole proprietors or corporate entities): factories or companies which crush olives for olive growers under contract and account for 45% of Spain's mills and 30% of the oil produced.

2.4. MARKET BACKGROUND

It should be noted that, in recent years, the sector has undergone a series of changes that relate to the emergence of the new olive growing, characterized by intensive use of the factors of land and water, as well as a significant decrease in the production costs.

The development of this olive growing worldwide, notably influenced by the low prices, which negatively impacts margins agriculture. Thus, changes that occur in the market are a new requirement reformulation also how to produce in the processing industry. In this sense, it has created an industry with a structure that allows more easily meet these requirements, using the oil processing cooperatives (mills).

On the other hand, the gradual removal of subsidies on production by the Community authorities through the CAP (Common Agricultural Policy) is negatively affecting the sector, so the margins reductions are exacerbated too. Thus, new strategies are needed to try to valorize the resulting production by linking with a territory or creating a quality brand. If we consider that the majority of the production of olive oil bulk oil corresponds with strategies and development of the area will involve improving production quality and, above all, the incorporation in the production chain of cooperative marketing and marketing departments that respond or even be able to create a new demand for quality oil, all of which will involve the introduction of changes in the way work is organized in the main centers of production, this is, farmers cooperatives for the production of oil.

According to recent analysis MFAO which is the official exchange, regulated by the Spanish financial authorities (the CNMV), to trade futures contracts on olive oil, the olive oil sector in Spain is facing an atypical year (2013) in which the fall in production is having a strong impact on world markets. The situation is that in the market there is less oil available at a price higher than in past campaigns. Circumstances are having a noticeable effect on sales of our oil to Italy, which have plummeted. Regarding to data prepared by the Agency for Olive Oil, which far this season (until June 2013) Alpine country sales totaled 108,600 tons, a far cry from the 248,800 tons in the corresponding month last year.

In this scenario, consumers from new countries are bearing the weight of our exports, thus in those markets, the consumers are assuming without any problems the increase in prices of the product in origin that are occurring this season. In fact, by market, Olive Oils of Spain are paid between 20 and 30 % higher than a year ago.

Thus, in many of these markets has not only maintained the level of sales of other years, but have increased sharply. In this regard it should be noted that the prize goes to China among our customers, exceeding for the first time the 10,000 tons of olive oils from Spain in a semester. According to China Customs, until June China bought 10,302 tons, which means an increased over the same period of 2012 of 27.50%. Such growth allows Spain to increase its market share in that market to nearly 58%. The value of sales grew by 57.55%.

Also it was very positive sales developments in Japan. A market has also overcome the barrier of 10,000 tons in the first half of 2013, representing growth of over 25 % in volume and 48.21 % in value, gained more than four points of share in the Japanese market.

FIGURE 5. GEOGRAPHIC DISTRIBUTION OF OLIVE OIL PRODUCTION (Mill Metric Tons)
GEOGRAPHIC COMPARATIVE OF OLIVE OIL PRODUCTION

GEOGRAPHIC DISTRIBUTION OF OLIVE OIL PRODUCTION (Mill Metric Tons)	
AREA	11/12
WORLD	3.098
U.E.	2.180,5
SPAIN	1.614
ANDALUSIA	1.363
JAEN	682
GEOGRAPHIC COMPARATIVE OF OLIVE OIL PRODUCTION	
U.E./WORLD	70%
SPAIN/U.E.	74%
ANDALUSIA/SPAIN	84%
JAEN/ANDALUSIA	50%

Source: COI. AAO.

According to the Figure 5, we see that even enduring difficult campaigns, currently is more than evident the superiority of Spain with respect to each of its competing countries. If we look at the olive oil consume, Italy leads global oil consumption to 710,000 tons (average of the last five years), so it produces less than it

consumes. For its part, Spain is the second largest consumer, with some 544 000 tons per year, less than the produced volume, which explains our surplus position and dependent on exports to place domestic production, as opposed to the insufficient Italian production which makes need to buy oil to meet the consumption exceeds production.

2.5. BUSINESS STRUCTURE

The basic primary structure Olive Oil Sector relies on a powerful production system that has grown strongly in the last 20 years:

The cultivated area counts 2.58 million hectares (71.73% of rainfed and 28.27% of irrigated). The total area accounts for 5.1% of the total acreage of Spain, according to results from the survey on surfaces 2011 of the Ministry of Agriculture, Food and Environment. The olive crop is the second largest after cereals and it is present in 34 of the 50 Spanish provinces, Andalusia representing 60,385 of the total area of existing olive grove in Spain.

The traditional olive (80-120 olive trees/ha) rainfed occupies the largest area and although irrigation has increased in recent years has been implementing a new olive growing very intensive which requires better quality soils, irrigation and high mechanization , which translates into higher productivity and lower production costs and provides a significant increase in current production potential.

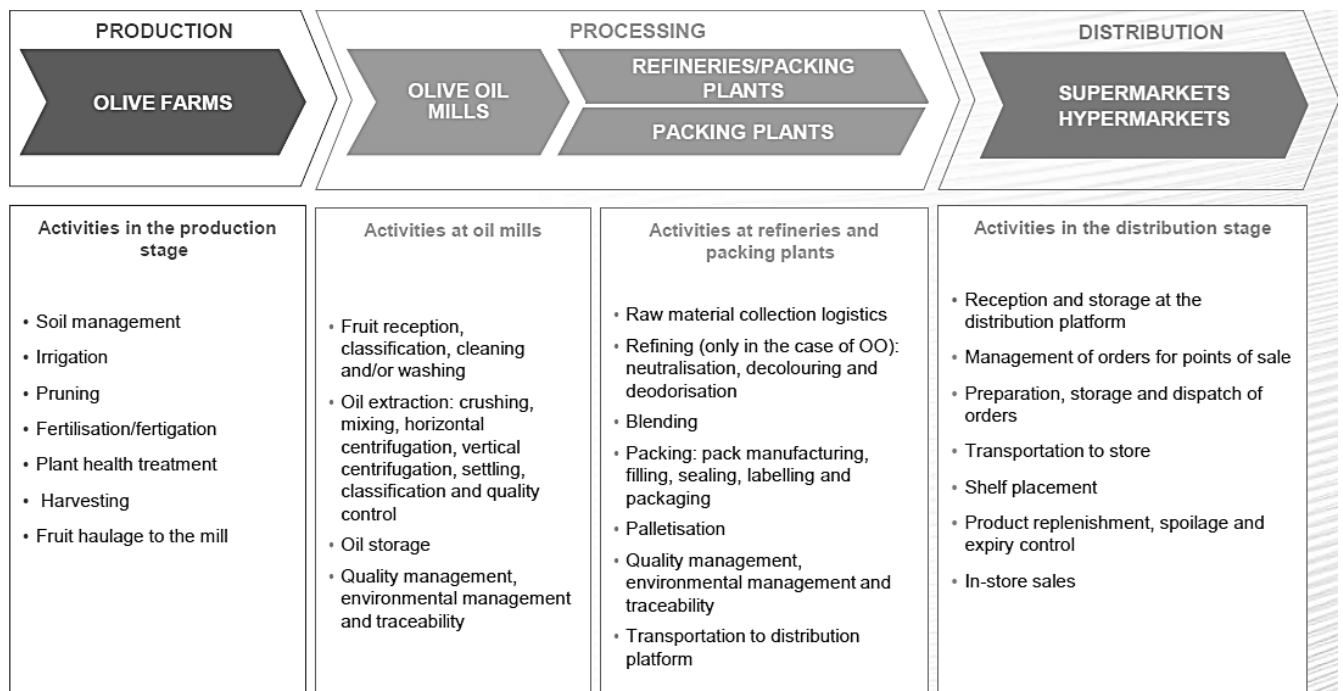
The transforming industry structure of this sector includes about 2,000 companies and cooperatives:

In the 2010/2011 campaign, the number of cooperative mills was 947 of a total of 1,744 mills and the production of the cooperative mills that developed their business was 945,000. The cooperative's mills production was 1,389,648.4 tonnes and 730 cooperative mills developed packaging activity.

The mills have experienced a high degree of capitalization, incorporating new technologies (processes, equipment and materials) that have resulted in significant improvements in the average quality of the oils and the elimination of the environmental impact discharges. The total olive production in Spain, 96% goes to the production of oil and the remaining 4% to the different varieties of table.

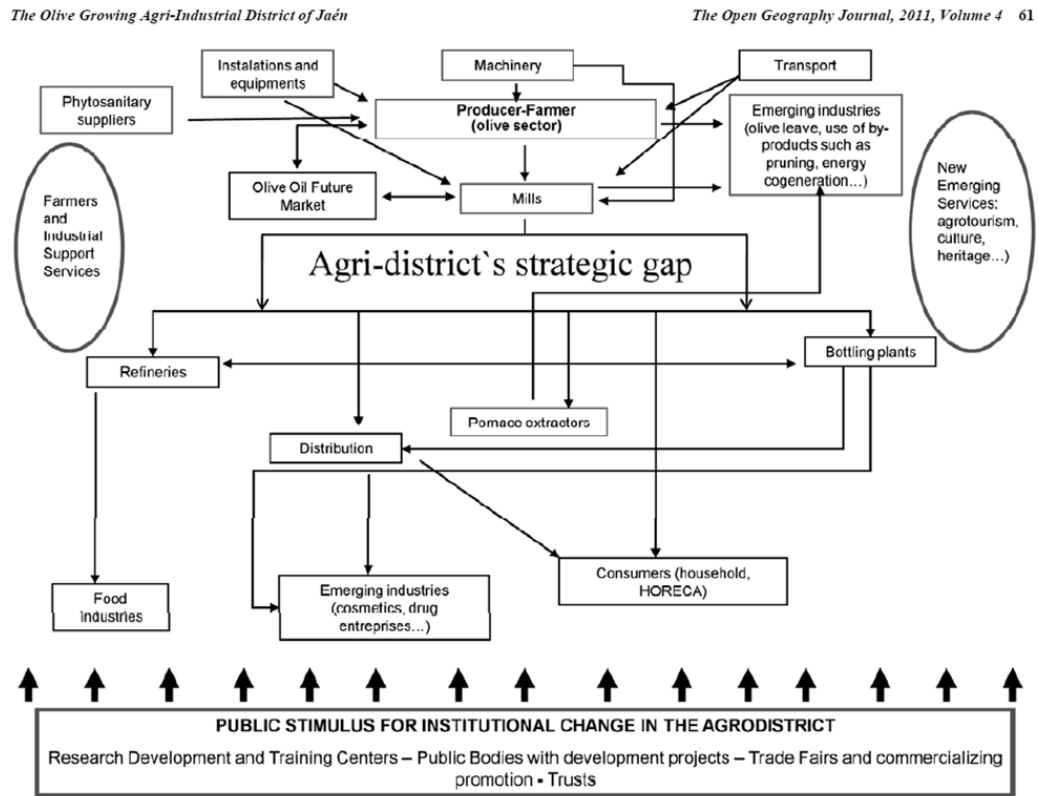
In Figure 6 you can see the summary of the general olive oil sector and the different activities for every player within the value chain.

FIGURE 6. GENERAL OLIVE OIL SECTOR (Description of activities)



Source: Ministry of Environment, Rural and Marine Affairs Spain. the Olive oil Agency (2012)

FIGURE 7. DIAGRAM OF THE OLIVE OILS CLUSTER



Source: Rodriguez-Cohard y Parras. *The Open Geography Journal* (2011)

In Figure 7 we outline the complex network of commercial exchanges or channels, by means of which the organizations and agents that make up the olive oils cluster inter-relate. As we can see, alongside the primary sector/olive oils sector, and moving up the value chain, are a series of industries that are inter-connected whilst having different characteristics. Furthermore, some of these organizations cover several functions within the production-consumption chain.

For several years, we have witnessed diversification within the cluster, with new players who, attracted by the increased demand for products related to the Mediterranean diet and the use of olive oils, are establishing new 'emerging activities' which are having a noticeable influence on the agri-district. Hence we can speak of concentric diversification operating in four directions:

1. Food industries
2. Cosmetic and even pharmaceutical industries that are using olive oils in developing their products as a result of the widespread recognition of the health benefits of consuming olive oils.
3. Industries operating on the back of by-products and waste products from the olive grove and olive oils, thanks to which such products increase in value.
4. Services related to positively valuing olive-growing heritage, from an environmental and cultural perspective. Tourism, gastronomy and educational leisure activities can provide the agri-district with a new profit dimension of high value-added, within a long-term strategy.

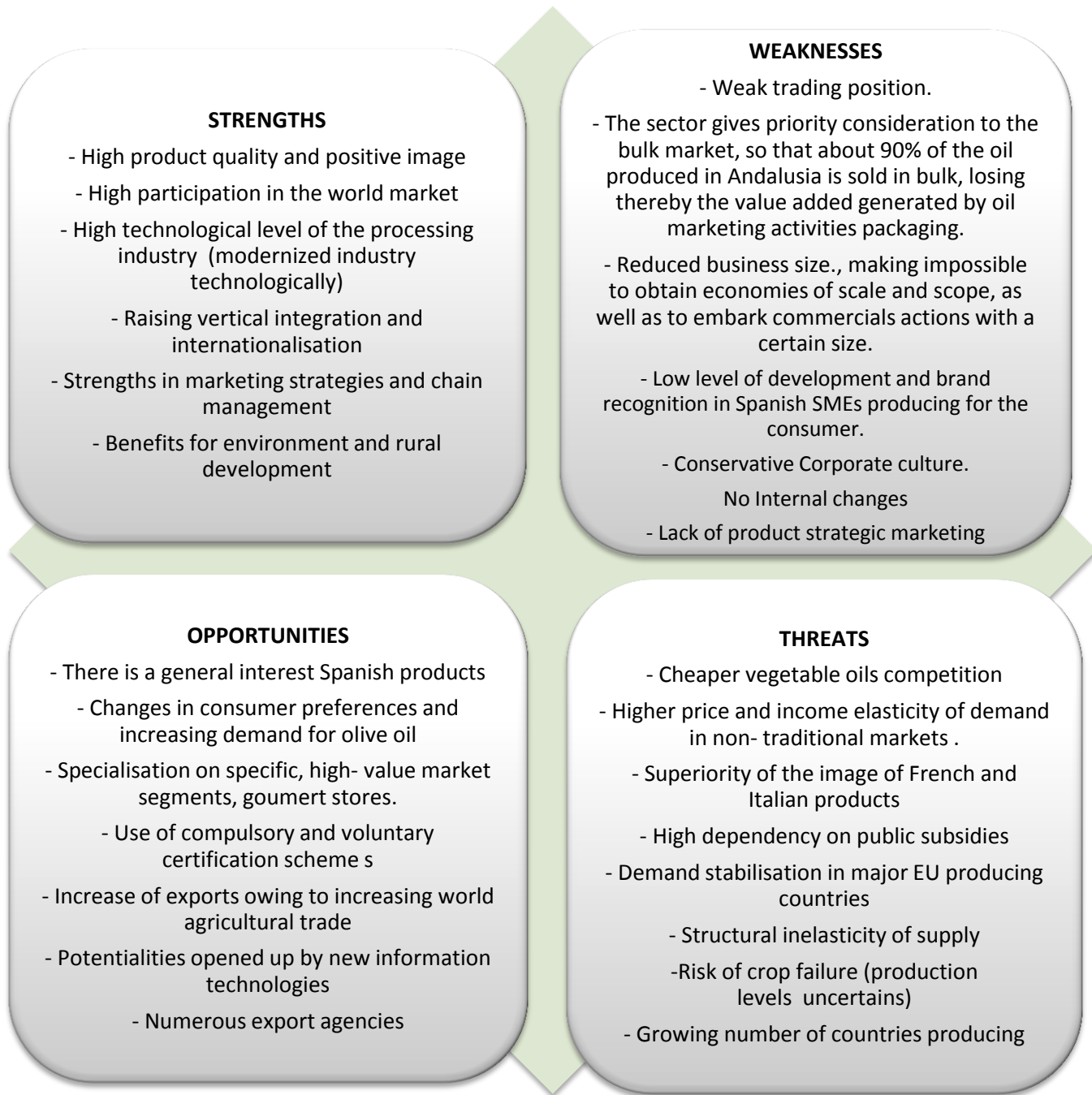
3. SWOT ANALYSIS

In order to explain what are the traits or behaviors that define the sector and the trend followed in recent years, we are going to use the SWOT analysis which is tool that identifies the strengths, weaknesses, opportunities and threats of an organization or sector. Specifically, SWOT is a basic, straightforward model that assesses what an organization can and cannot do as well as its potential opportunities and threats. The method of SWOT analysis is to take the information from an environmental analysis and separate it into internal (strengths and weaknesses) and external issues (opportunities and threats). Once this is completed, SWOT analysis determines what may assist the firm in accomplishing its objectives, and what obstacles must be overcome or minimized to achieve desired results. In this sense, the defining elements of the current industry model have been summarized in Figure 8.

As seen in the analysis SWOTS the sector offers great opportunities for those companies which are able to provide high product quality for high- value market segments. So here given the lack of brand recognition most companies should increase its marketing investments in order to confront the increasing competition.

Another important strength is the high technological level of the processing industry and the innovation which are completely related on the one hand to the possibility to reach economic scales and on the other hand to avoid poor seasons such as the one last year. In addition, other prominent weaknesses of the sector are that most companies operating in the no bargaining power and still have a traditional mindset to penetrate new and unknown markets, without forgetting the its high dependency on public subsidies.

FIGURE 8: SWOTS ANYLISIS



Source: Market of Olive Residues for Energy. Intelligent Energy Europe

4. OLIVE OIL IN ANDALUSIA

Andalusia, peripheral region of the south of Europe, is characterized by an outstanding specialization in the production of virgin olive oil. The general climate is typical of the Mediterranean, with hot, dry summers, winters with mild temperatures, and irregular precipitation. Nevertheless, due to the extensive territory which Andalusia covers, there are areas with diverse climates, from desert areas to mountains with high rainfall, from snowy mountain ranges to a large coast, as well as other natural microclimates. An important detail to note is that throughout the year many areas of Andalusia enjoy over three thousand hours of sunlight.

The production of olive oil is extended throughout the region, although it is concentrated primarily in the provinces of Jaén and Córdoba. The types of olives cultivated in Andalusia for the production of oil are: Picual, Hojiblanca, Lechín, Verdial and Picudo and its main variety produced is the olive extra oil which is more demanded around the world.

In Andalusia, the food industry has a huge importance for the region economy thus this industry is intimately linked to the agricultural sector, since for Andalusia this industry gives around 25% of its wealth and in Spain a 20%. Although, Andalusia just represents the 15% of the total national sales.

The olive production counted almost the 30% of the final agricultural production, generating more than 150,000 jobs and produces 22 million wages. At the enterprise level, this sector comprises 20% of all firms in Andalusia, having at the moment with 833 mills and 229 table olive production plants. The olive oil sector and table olives are the main economic engine of more than 300 key Andalusian municipalities according to the Department of Employment, SAE in 2007.

Currently, local production systems linked to olive are configured as a fundamental component in the development of much of rural Andalusia. In this sense, the area devoted to olive grove in Andalusia over a million and a half hectares, equivalent to 33% of agricultural land and 16% of the total area of the region. In addition, the production of olive oil is one of the main economic activities in Andalucía being the most important industrial subsector of Andalusia, accounting for 21.5% of the industry by turnover (14,435 million euros). By other hand, the production of olive

oil in Andalusia represents approximately 85% of the Spanish production, 44 of the European Union and more than 33% worldwide, according to the International Olive Council (2009).

Moreover, there are 295,539 Andalusia olive farms destined for olive oil mill, of which 140,641 (48%) were in the province of Jaén in 2008 according to the Regional Government of Andalusia. This figure demonstrates a key element in characterizing the “agro district”, as is the small size of the olive farms (4 hectares).

Considering the type of cultivate that develops in each region, in the province of Jaén olive cutting predominant traditional, as evidenced by the average density of farms, which stands at 117 trees per hectare, far away from the figures Almeria and Seville, 173.7 and 163.2, respectively, and even Andalusian average (130.3 stems per hectare).

These data are indicative of the prevalence in the province of Jaen of a traditional olive grove and the scarcity of intensive olive (olive 200-550 per hectare) and super (2,000 trees per hectare), which are characterized by much more productive, more easily machined, and therefore, much more profitable.

However, it should be noted that the Jaen’s olive is by far, the most productive of Andalusia, both in non-irrigated and irrigated cultivate. So while the average production per hectare olive in Andalusia is 3,431 and 4,451 kg in dry land and irrigated, respectively, half of the province of Jaén are 3,789 and 5,056. Definitely, Jaén is the most important region of producing olive oil in the world, with 25% of the national area, 40% of the Andalusia and 7.5% of the world, as the following picture shows. It is interesting to note that the province of Jaén produces more olive oil than all of Greece, another large producer of olive oil in the world.

Figures 9, 10 and 11 support and provide further details, as explained above.

FIGURE 9: OLIVE TABLE AND OLIVE OIL PRODUCTION IN ANDALUCIA (REGIONS)

Provincia	Aceituna de molino (Tm)	Aceite (Tm)	Variación media 5 últimas campañas (%)
Almería	49.548	9.704	+ 3 %
Cádiz	23.677	4.705	- 37 %
Córdoba	740.000	148.000	- 35 %
Granada	273.388	61.739	- 57 %
Huelva	20.216	3.538	- 38 %
Jaén	764.045	170.000	- 69 %
Málaga	250.800	51.850	- 23 %
Sevilla	317.793	64.412	- 22 %
Andalucía	2.439.467	513.948	- 53 %

Source: Consejería de la Junta de Andalucía (2012)

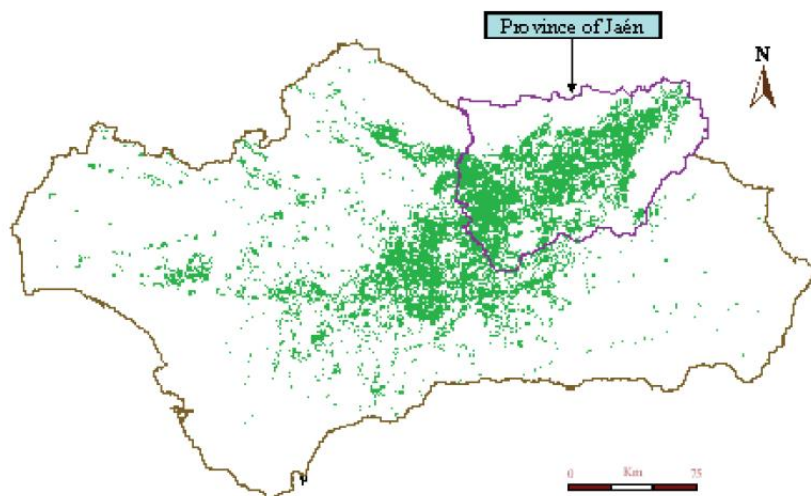
FIGURE 10. NUMBER OF ALMAZARAS AND ITS PRODUCTION IN ANDALUCIA (REGIONS)

Source: Ministry of Environment, Rural and Marine Affairs Spain. the Olive oil

COMUNIDAD AUTONOMA	PROVINCIA	ALMAZARAS N° *			PRODUCCIÓN		
		TOTALES	COOPERATIVAS	INDUSTRIALES	TOTALES	COOPERATIVAS	INDUSTRIALES
ANDALUCIA	ALMERIA	22	5 (23%)	17 (77%)	2.411,5	192,6 (8%)	2.218,9 (92%)
	CADIZ	11	4 (36%)	7 (64%)	1.574,5	1.306,3 (83%)	268,2 (17%)
	CORDOBA	179	72 (40%)	107 (60%)	16.685,2	5.812,5 (35%)	10.872,8 (65%)
	GRANADA	102	44 (43%)	58 (57%)	1.898,6	1.135,7 (60%)	762,9 (40%)
	HUELVA	16	14 (88%)	2 (13%)	2.074,5	1.917 (92%)	157,5 (8%)
	JAEN	319	193 (61%)	126 (40%)	6.067,1	3.082,9 (51%)	2.984,2 (49%)
	MALAGA	64	42 (66%)	22 (34%)	4.445,2	3.135,7 (71%)	1.309,5 (29%)
	SEVILLA	77	49 (64%)	28 (36%)	20.270,8	12.609,2 (62%)	7.661,6 (38%)
	TOTAL CCAA :	790	423 (54%)	367 (46%)	55.427,4	29.191,9 (53%)	26.235,5 (47%)

Agency (2012)

FIGURE 11: LOCATION OF OLIVE GROVES IN ANDALUCÍA



Source: Rodríguez-Cohard y Parras. The Open Geography Journal (2011)

Regarding to the farm's size the predominantly olive farms are small and medium-sized under the formula of part-time farming. The farmer grinds the product in the cooperative or sells it to a private mill. In general, farmers are used to receiving CAP supports for the working time spent on farming, in this way they inhibit their entrepreneurial and innovative capacity.

In general, the mills have associative character which can lead to the most of them have serious organizational weaknesses resulting from poor or non-existent business management, lack of professional management and stiffness in the decision-making mechanisms. This situation does not encourage the professional development of export activity, which at 57.14 % of cases is directly developed by the manager of the cooperative, and even the president of the same (4.7%) or the governing board (9.5%). The export carries risks thus it must be assumed certain specific costs linked to factors ranging from the choice of the destination country, the assessment of the opportunities, technical regulations and identification of contact with potential overseas distributors. Moreover, it can be proved that those associated cooperatives have a short-term focus instead of a long one which allows creating a sustainable commercial activity.

The most of the companies within the sector are confined to obtain the olive oil from its associated producers, store it if there are problems in the market and then sell it to large companies with which only contract a reduced number of transactions of high volume and always mediated by independent brokers. These are, in fact, who contact with production companies without any commercial rivalry between them, largely because they believe that "the olive oil will sell itself".

The private industrial mills operate primarily in the wholesale market, selling its bulk production. However, his character has allowed companies collectively operating more efficiently and end market presence nationally and internationally, especially those with a certain size. Within the international market we can find principally 2 kinds of olives oil: those which are selling through supermarkets and discount chains or on the other hand, those oils that are distributed by specialised channels. While in the first distributor channel we can find cheaper and undifferentiated products like Carbonell, Hojiblanca, etc., in the second one you can find differentiated products

which are characterized by offering quality and exclusive olive oils (Castillo de Canena Olive oil).

The effects of globalization on the emergence and rapid development of new technologies, almost instantaneous exchange of information, culinary habits developing increasingly sophisticated, resulting in increased levels of consumer demand, favoring the emergence of new sales channels provide the opportunity for agribusiness Andalusia to reach more potential customers.

5. OLIVE INDUSTRY IN ALMERIA: GENERAL FEATURES

Almeria is a province of Spain on the shores of the Mediterranean which belongs to the autonomous community of Andalusia. It's arid climate with annual rainfall under 200mm as average and 600mm on the mountain side conditions the agriculture until recent times which was devoted to non-irrigated crops like cereals, olives, grapes and almond trees. The new irrigated systems by drip systems have allowed climbing the adverse arid conditions and the land desertification that have turned the province into a large agricultural producer.

Regarding to the olive crop in Almería, the main variety of olive tree is the Lechín one which is cultivated across Granada and Malaga too. This variety is characterized by its great skill at adapting to circumstances, tolerating the cold and the drought. Mainly this cultivation is intended to produce quality olive oil due to its high fat yield. These oils are pale yellow, sweet and very fluid, very traditionally appointed Granada and Almería.

In Almería there are 25 olive oil companies filling a position 11 of the ranking of 34 Spanish producers' provinces. Within those mills there are 40,000 people who are working directly or indirectly. Another important feature to take into account is the fact that Almería is practically the province which produces more extra *olive oil* characterized by its low acidity and quality.

Here we have the list of companies which are introducing its own olive oil within the domestic market principally:

- S.A.L. ALPUOLIVA
- FLOR DE OLIVA, C.B
- S.C.A.ALMAZARA DE FELIX
- AGRICOLA GARCIA, S.L.
- FERNANDO JIMENEZ GARCIA
- ALMAZARA ULEILA, S.L.
- RAMONA CUCURULL CASANOVAS, ALMAZARA CUCURULL
- RODRIGUEZ QUILES, DIEGO

- OLIVARERA LA SANTA CRUZ,SL
- CAMPOS DE ULEILA, S.L.
- JUAN JOSE MOLINA GONZALEZ ,ALMAZARA DE GAFARILLOS
- S.A.T. OLISUR
- BORGES, S.A.U.
- LLANO OLIVA, SAT
- ACEITES DE ALCOLEA, S.COOP.AND.
- EXPLOTACIONES AGRICOLAS JIMENEZ, S.L.
- ORO DEL DESIERTO S.L. (RAFAEL ALONSO AGUILERA)
- EXPLOTACIONES AGRICOLAS SERON, S.L.
- CIA INTERNACIONAL DE CAFES, S.A.
- SAT VEGA DEL ANDARAX, ALMAZARAVEGADELANDARAX
- PRODUCTOS NATURALES DEL DESIERTO,S.L. ACEITECASTILLODETABERNAS
- FIÑAOLIVA, S.A.
- ZURANO RAMIREZ, S.L.
- JUAN ANTONIO SANCHEZ CAÑABATE, ALMAZARA LABRUCENA
- ACEITES DE TABERNAS, S. C. A ALMAZARA DEL DESIERTO

In the 2012-2013 campaign Almeria has had 19,847 hectares of olive cultivation, an area by 2.8% on the previous year. Of this area, 82 hectares are table olive grove, and the rest, to olive oil mill. Most of the olive groves of the province are irrigated (12,886 hectares).

The olive harvest amounted to 50.8 million kilos, 2.2% lower than in the previous season. This slight decline was largely due to damage caused by heavy rains in October 2012. However, Almería has been the Andalusian province where less is down oil production: 9.7 million kilos (2.2% less than in the 2011-2012 campaigns). However, Almería has been the Andalusian province where this reduction in the oil production has been lowest: 9.7 million kilos (2.2% less than in the 2011-2012 campaigns).

Most of the oil produced by the mills of Almería has been extra virgin (8.7 million kilos); 871,000 kilos has been a virgin, and 97,000 kilos of lamp oil. Regarding the flavored olive have been produced nearly 1.4 million kilos. The defatted residue production was 22.2 million kilos. Article published in almeria360.com: The value of exports of olive oil rose Almeria 332% until April.

6. INTERNATIONAL BACKGROUND

Nowadays the olive oil business is increasing, the scientific investigations of its fundamental biologic properties and therefore its dissemination have brought with an important escalating demand around the world, due to increasingly discerning demands from the consumers who are more interested in healthy food which can provide beneficial health properties. Those global consumers are coming from principally Italy, France, Portugal, United States, United Kingdom, Japan, Belgium, Germany, Australia, Nederland, Switzerland and Canada. It consists of a bundle of markets with a high level of income per capita and in which the consumers become well-informed about quality. Within this group of countries Italy highlights as the most representative importer with a 40% of the total.

These imports from Italy are due largely to the needs of companies in this country to fulfill the demand of foreign customers spread around the world and, to a lesser extent, specific imbalances that exist between domestic production and consumption. This situation is not unique to this market, also France and Portugal, with a long tradition in the production and marketing of this product and neighbouring countries, the leading producer of this shortening, recorded similar behaviors. Both are among the leading global suppliers and yet, according to information from the IOC, have a lower volume of domestic production to total consumption.

The Spanish Olive Oil is exported to more than 100 countries within the 5 continents, although its main markets vary depending on if they export in bulk (principally within the EU) or in packages of a maximum of 5 kg which are directly traded to customers, restaurants, establishments and gourmet stores all over the world. While Italy is the is the main market for bulk oil, following by France, Portugal and United Kingdom, the packaging olive oil is sold primarily to Australia, United States, Brazil, Japan and France (representing by 25% of total sales). Although bulk sales are still considerable especially in Italy and Portugal, these are decreasing each year for the benefit of bottled oil, which provides greater value and benefit to the producer and industry.

In 2012 the global oil production grew by 11% (2,973,500 tons). The whole producing countries in Europe grow by 15%. These increases are reflected mainly in Spain with 371 500 t (+36%), Greece 15 000 t (+5%) and Portugal 9100 t (+17%). Countries members of IOC (International Olive Council) represent 98% of world production of which 75% came from the EU-27 producing countries. During this campaign the production exceeded consumption by 71,500 t.

In 2012, the global olive oil consumption reached 2,902,000 t (+ 2%) compared to the previous season. Some IOC members countries like Morocco consumption increased (+29%) compared to the previous season, Syria (+20%) and Turkey (+2%). By other hand, there was an important increase from mainly importing countries, such as Brazil (20%), Canada (23%), Japan (35%), Russia (47%) and China (50%). The 80% of the world corresponds to the IOC member countries and 64% to European Union countries. Regarding to the olive oil exports from the European Union during this campaign, they represented 68% of world exports. The European Union participates in global consumption over 62%. The difference between production and consumption is + 34,500 t. In Figure 12, we can see the evolution of olive oil imports for the most representative countries (included luxury olive oil).

FIGURE 12. EVOLUTION OF OLIVE OIL IMPORTS FOR THE MOST REPRESENTATIVE COUNTRIES (1000 T).

País	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Australia	30.0	27.0	32.0	31.0	29.0	32.7	42.1	27.8	29.0	35.5	31.9
Brasil	25.0	23.0	21.0	24.0	27.0	26.0	36.0	44.0	44.5	53.8	65.0
Canadá	26.0	24.0	25.0	26.0	32.0	30.0	34.0	34.0	32.0	37.9	41.0
Corea del Sur	2.6	3.2	5.1	12.0	27.1	23.1	11.7	12.5	9.5	11.4	12.8
China	0.4	0.5	0.8	2.0	4.0	5.7	7.0	10.4	12.8	20.6	33.2
Estados Unidos	215.0	218.0	216.0	248.0	246.9	242.5	262.0	264.0	276.5	272.0	292.0
Japón	30.0	32.0	31.0	32.0	33.2	30.2	32.0	30.0	33.3	43.0	37.5
India	0.5	0.9	0.9	1.0	1.0	1.4	1.5	2.5	2.7	3.4	5.0
Rusia	3.0	5.1	7.7	8.6	11.7	10.5	16.6	19.3	16.5	24.8	26.6
Total	332.5	333.7	339.5	384.6	411.9	402.1	442.9	444.5	456.8	502.4	545.0

Source: Official magazine of the International Olive Council

Currently, Spain is the largest exporter of oil, reaching more than 140 countries. The main destinations are Italy, Portugal, USA, France, UK, China, Japan, Australia and Brazil. Spain sells 60% of its output to the outside, and it becomes increasingly bulk packaging. In this way Spain has replaced Italy as the main supplier of olive oil to emerging markets.

The value of exports and imports of trade food industries has increased over the previous year (2012), reaching around 19.775 million euros, for exports, and 15.891 million euros for imports. The balance is positive and the rate of coverage is greater than the last recorded years indicating that have exported more, obtaining a record rate of coverage is around 124.4%.

The most representative products exported in 2012 according to data Pig meat (2,908 M €), Wines (2,567 M €) and Olive oil (1,849M €).

FIGURE 13. ESTIMATED BALANCE 2012/2013 CROP YEAR (1,000 TONNES)

	Production	Imports	Consumption	Exports		
Albania	32,0	1,5	32,0	2,0		
Algeria	157,0	0,0	155,0	0,0		
Argentina	60,0	2,0	35,0	65,0		
Australia	3,5	17,5	21,0	0,0		
Brazil	0,0	100,0	100,0	0,0		
Canada	0,0	27,0	27,0	0,0		
E.U./27	666,0 a)	97,0 b)	627,5	245,5 b)		
Croatia	1,0	1,5	2,0	0,5		
Egypt	300,0	0,0	300,0	80,0		
U.S.A.	85,0	135,0	215,0	4,5		
Iran	66,0	5,0	71,0	0,0		
Israel	14,0	6,0	20,0	1,0		
Japan	0,0	4,0	4,0	0,0		
Jordan	38,0	1,0	30,5	8,0		
Lebanon	20,0	2,0	25,0	5,0		
Libya	3,0	4,5	7,5	0,0		
Morocco	100,0	0,0	32,0	70,0		
Palestine	9,0	0,0	8,0	0,0		
Russian Fed.	0,0	68,0	68,0	0,0		
Syria	172,0	0,0	132,0	35,0		
Tunisia	24,0	0,0	22,0	2,0		
Turkey	410,0	0,0	350,0	70,0		
Other countries	154,5	111,0	225,5	36,5		
TOTAL	2.315,0	583,0	2.510,0	625,0		
0 Nil or under 300 tonnes						
a) Of which:	<u>Cyprus</u>	<u>Spain</u>	<u>France</u>	<u>Greece</u>	<u>Italy</u>	<u>Portugal</u>
2012/13	2,8	450,0	1,2	130,0	74,0	8,0
b) Includes extra-Community trade only.						

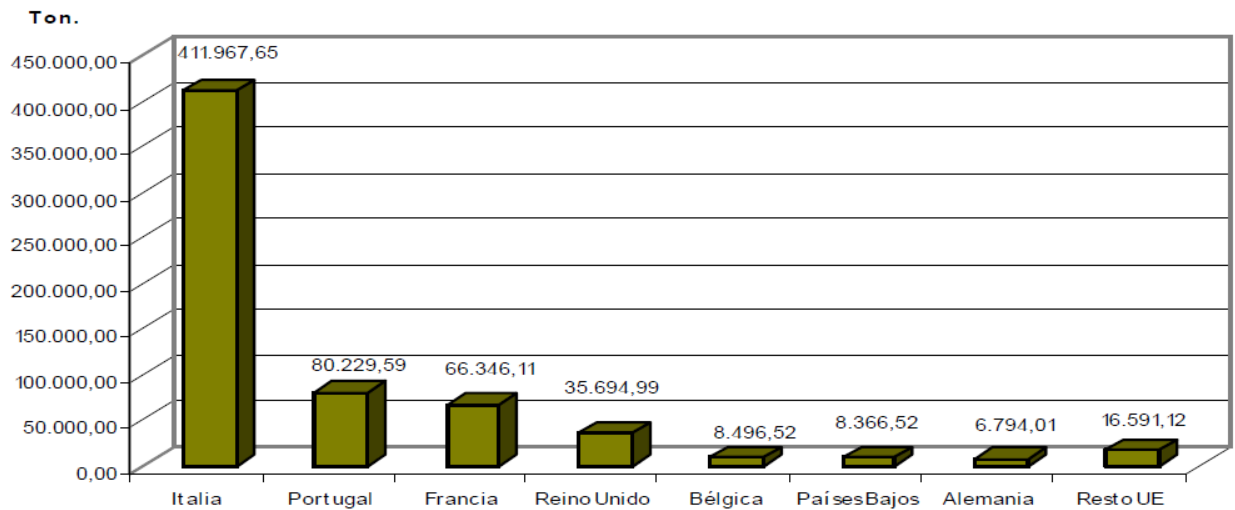
Source: International Olive Council (November, 2012)

FIGURE 14: OLIVE OILS MARKET. SALES AND MARKET SHARE BY GROUPS AND BRANDS IN SPAIN (MARCH 2008-MARCH 2009)

Groups	Olive Oils		Virgin Olive Oils	
	Sales (in Thousands of Litres)	Market Share (%)	Sales (in Thousands of Litres)	Market Share (%)
Distributor Brands	144,681	70.06	40,302	44.40
SOS Group (Koipe, Carbonell, Salgado and Elosúa)	34,204	16.56	7,813	8.61
Ybarra-Migasa Group (La Masia, Ybarra, Mueloliva, Minerva and Rafael Salgado)	10,292	4.98	890	0.98
Acesur Group (Coosur and La Española)	7,320	3.54	8,911	9.82
Hojiblanca Group (Hojiblanca, Cordoliva and Torcaoliva)			11,898	13.10
Borges (Borges)	2,121	1.04	1,340	1.47
El Molino De Bertin			2,222	2.45
Olivar de Segura			825	0.91
Oleoestepa (Oleoestepa)			284	0.31
Rest	7,874	3.82	16,289	17.95
TOTAL	206,492	100.00	90,774	100.00

Source: Rodriguez-Cohard y Parras. *The Open Geography Journal* (2011)

FIGURE 15. EXPORTS TO EU SPANISH OLIVE OIL (CAMPAIGN 2010/2011)



Source: ICEX – Instituto Español de Comercio Exterior, 2012

6.1. EXPORT IN ANDALUSIA

The main food product exports from Andalusia during 2012 has been virgin olive oil, with almost one billion euros, representing 14% of the total Andalusia's food exports, more than 6,990 million euros, according to the report by the Ministry of Agriculture, Fisheries and Environment data from the Institute of Foreign Trade.

The growing external orientation of Andalusia olive oil production corresponds therefore with competitive defensive strategies, related to the improvement of production efficiency, they have on the price of the product its primary endpoint.

By contrast, in other Spanish regions, companies get higher prices from the goods offered, linked to effective use of local resources and business strategies that give specificity to the product, developing niche markets that generate outstanding benefits. In general terms, in Andalusia, there is a low level of export activity, if you compare with the main producers from other regions like Basque Country, Valencia and Catalonia where the companies have a clear external orientation selling even more extra olive oil than they actually produce within their regions. Moreover, another important point to take into account is the fact that the majority of Andalusia's companies sell preferably to Italian's clients which is a really mature market.

6.2 EXPORT IN ALMERIA

Almeria last year exported olive oil valued at 2.5 million euros, 8.4% more than in 2011. Italy is the main destination of 'liquid gold' in the province, followed by the USA, which acquired 12.4% of the total sales Last year, the mills of the province of Almería, in 186 commercial operations, exported one , 24 million kilos of olive oil, an amount that accounts for 5.6% more than in 2011 and almost triple that in 2010, when sales abroad amounted to 460,000 kilos. The value of these sales was around 2.6 million euros, 8.38% more than in the reference year, according to data provided by the Provincial Delegation of the Ministry of Agriculture, Fisheries and Environment from the last report Icx. Italy was confirmed in 2012 as the main destination of olive oil mills Almeria traded in foreign markets. Italy acquired product valued at 1.7 million

euros, which represents 66% of the total. On the other hand, the United States has tripled purchases compared with the year 2011, purchases with a value of around 319,000 euros, 12.4% of total olive oil exports from Almeria, as highlighted by the regional delegate of the Ministry of Agriculture and Fisheries, José Manuel Ortiz. Switzerland was the third destination (10.2% of total), followed by Andorra (2.5%), Croatia (2.3) and Japan (2%). Smaller amounts were sent to Belgium, Mexico, Germany and Norway.

7. APPROACH TO THE REALITY OF ALMERÍA'S COMPANIES

In Almería as we have said before there are only 25 companies producing olive oil, of which 5 companies have decided to expand their market by directing their product abroad. This fact is very significant and shows the great business knowledge that businesses in our region have been acquiring probably inspired by the great international expansion of some traditional products of Almería such as marble or vegetables.

Because of this evidence and the incipient development of this product in our province, it was decided to carry out this project. For this, I have asked these companies which are listed below for collaboration in order to have worthwhile information to draw some conclusions.

- ORO DEL DESIERTO
- GRUPO CAPARRÓS: ORO DE NIJAR (Sol de Portocarrero)
- LA ALMAZARA DE CANJAYAR
- CAMPOS DE ULEILA
- CASTILLO DE TABERNAS

Moreover, after a deep analysis about the strongest companies which are actually established in the market, it was considered as well one company located in Jaén called CASTILLO DE CANENA.

Given the subjective nature of the information required for the analysis, it was necessary to use primary sources conducting semi-structured interviews aimed at those directly responsible for this openness to international trade through phone calls and emails. In order to create a semi-structured interview (lighter and directed to information valuable) each of the companies previously received an official letter of presentation that were specified each of the items to be discussed during the interview. It helped that all respondents were prepared to give this information considered so unambiguously clear and specific. Those interviewees were mostly managers of each company itself who started their business abroad and in other cases

I was addressed by the International Operations Manager. A copy of the said cover letter is attached (see appendix 1).

To get in depth knowledge on these companies, other secondary resources (reliable and independent) have been consulted like companies' websites, newspapers, magazines, periodicals and media files.

Below, we have a presentation about every company management and its exporting activity. Principally we have considered the information about its international management regarding to its organizational structure, the regularity of its activity abroad, marketing strategy followed, from collaboration and cooperation with outside organizations, external agents or other companies, which provide expertise and resources, or directly, assuming full control, cost and risk of the export process. In addition, the range of countries where the company operates, its proximity, the type of product offered, in bulk or packaged, or the interest of the company by its foreign business.

7.1 COMPANIES DESCRIPTIONS

- **ORO DEL DESIERTO**

- The company

“Oro del Desierto” is a family-owned and operated business placed in Tabernas (Almeria). The company starts activity in 1999. The company (located in an old Oil Mill from 1925) includes an Olive Oil Museum where is possible to see and understand the evolution of the Olive Oil productive process by three real size old Oil Mill and some scale models. There is also a restaurant where Organic Olive Oil as well as other typical products of Almería are the prime attraction of the menu.

- Products and production

Extra Virgin Olive Oil “Oro Del Desierto” comes from olives of organic cultivation and it is produced in a handmade way, with selected olives harvested by hand. Harvesting is carried out paying attention to the ripeness degree of the olives in each property. The management project of the company has been chosen for the EQUAL program, which shows economic and environmentally sustainable examples of company management.

In regard with the innovation, the company always has kept an attitude of perseverance the latest innovation. In fact, its system has obtained a Prize of the desk of Technological Development 2003, The Investigation Echo-olive Award 2004 and the IX Andres Nuñez de Prado Research 2nd Price 2007. Moreover, the company actually has a collaboration project with the Almeria's University, let vegetal yield department investigate and test in the farm new "saving water" irrigation systems and their application of sustainable cultures. Now, we can summarize its innovative activities by:

- Compost contribution coming from the solid residual coming from the blended Olive Mill with sheep manure and organic matter, which is directly added to the olive tree (2 kg/sqm).
 - Own, patented watering system that saves approximately 30% of water for fruit trees.
 - Guano contribution by the irrigation system from a raft in which air is injected to develop the bacterial decomposition and it is filtered later on.
 - Cattle raising integration to the agricultural activity.
- International business model

The company, from the beginning of its internationalization, has maintained the same way to work as it actually develops within the national market. Always when they affront a new market they first of all they conducted an in-depth survey of the market. This market research is carried out by internet and in some cases they go directly to the official bodies (ICEZ, Chamber of Commerce, etc.).

Afterward they start to look for partners or importers who are working "in situ" the market and have knowledge about customer's needs and preferences. Almost all the time, they have to face with some obstacles like burden of bureaucracy, border procedures, earlier analysis, etc. and further with some logistics and distribution procedures.

Through trial and error, they have been learning some techniques that are being helpful to others markets and exportation process. As I said before they work with importers in each country and their cooperation and support in these cases is essential. Imposts also report the best way to address the issues that arise. For all

these reasons it is really important to create a good partnership in order to work as teamwork.

- Recognition and degree of internationalization

High product quality and positive image The company has received important awards and prizes by its organization itself and its organic extra virgin olive oil. And several times the congratulation of the director of the Andalusia's alimentary laboratory because they have obtained the lowest acidity in the Spanish market, 0.07 in a complete lot of our olive oil. Just this year 2013 Desert Gold accounts for 24 awards, which joins the recent election of the 6th best oil in the world and the past "Olive Oil Competition China 2013" held in the city of Beijing in China where won the Gold Medal in the category Extra Virgin Olive Oils Organic.

By other hand, it is important to point out that its Organic Olive Oil is successfully sold in France, Germany, Switzerland, Sweden, Holland, UK and this fact is encouraging them to look for new markets and costumers.

- Internal changes:

The company has not experienced huge internal changes previously neither after the increasing sales abroad. Its employees remain the same and still perform the same work in addition to internationalization others as administration, marketing in Spain, quality, etc. In general terms, they have not increased its production; its international model business consists only in allocating a part of its production to abroad with higher prices, to confront the internal demand decreasing.

- Current situation and future prospects.

Today the company works with over 8 different transport companies, with at least 3 agents and customs transit with 3 different ports depending on where the merchandise is addressed. It has been the experience that has led them to work well today and have the process under control.

As for future prospects in the short/medium term by securing want and increase sales in the U.S., Japan and Russia. In addition, to maintain and increase sales across Europe and into new markets that may have potential for a product of its features such as Singapore and South Korea.

- **GRUPO CAPARRÓS: SOL DE PORTOCARRERO “ORO DE NIJAR”**

- *The company*

Caparrós group was born in 1984 as a familiar company. Its main activity is, exclusively, in the manipulation, classification, packaging and commercialization of agricultural products. Nowadays, the main basic objectives of the company are as follow: 1) Nourishing Security 2) Quality of the products 3) Provisions security and 4) Respect with the environment. They are very demanding with the quality of their products, and that’s why they apply strong quality controls. All the values meant the quality recognition by AENOR and also by the Junta de Andalusia, through the distinguishing of Registered Quality with the brand “Caparrós Nature”. The company has very new and modern facilities, located in Almería in the Nijar Road (El Alquian).

- *Products and production*

- Product portfolio

- | | |
|--------------------------|-------------------------|
| ✓ Extra virgin olive oil | ✓ Peppers |
| ✓ Eggplant | ✓ Roasted Peppers |
| ✓ Zucchini | ✓ Tomato sauce |
| ✓ Jams | ✓ Organic Tomato Sauces |
| ✓ Gazpacho | ✓ Watermelons |
| ✓ Melons | ✓ Tomatoes |
| ✓ Cucumbers | |

The company decided to incorporate the olive oil to their portfolio, thus they could take advantage of its reputation and loyal clients. This new addition was born with the company “Sol de Portocarrero S.R.O” founded in 2008 and integrated into the Group Business Group Caparros. This company carries out the extra olive oil production and distribution of varieties like Picual, Arbequina and Hojiblanca. Its production is located in the geographic area of Gata-Nijar Natural Park, and it means a great differentiation within the market and also in the Gérgal region.

- *International business model*

The commercialisation figures have had a very fast evolution in the last years, improving the market every year. The exportation started in September 1996. The

growth focused on the European Union continues its ascending rhythm but currently the majority of their export is sent to the rest of Spain. The 62% of the offer was destined to Spain, and Germany is the second client of the group with the 18%. After France, Italy has the 5% if our production followed by Austria, Czech Republic, Holland and Poland.

- *Recognition and degree of internationalization*

Nowadays, they are setting up “Caparrós Deutschland”, a new company which is located in Germany. Its principal activity is going to be the gourmet products trade. Moreover, “Oro de Nijar” was included in the 250 better olive oils in the world.

All the values meant the quality recognition by AENOR and also by the Junta de Andalucía, through the distinguishing of Registered Quality with the brand “Caparrós Nature”

- *Penetration in the market. Obstacles and development*

The main problem that they had to confront during the 2 firsts years within the international market was the important promotion investment, thus they had to compete with many other companies with similar products and prices. Mainly, those competitors are Italians and Greeks with a large presence within the European market. But happily, the company counted with a large accumulated experience abroad in trading the other products of the “Grupo Caparrós” commercialized successfully in Europe. In fact, the company’s acquired knowledge about some supporting programs for the internationalization has been really useful to develop its business abroad and introduce every product of its portfolio through of conducting various programs with different public’s administrations. This goes to strengthen the strategic line of internationalizing the business enterprise.

To overcome these obstacles have based their marketing strategy in specialty shops and gourmet dining in a professional setting. The areas for improvement would focus primarily on the development of the product, bringing together imaging conditions, quality and formats to meet the needs of international markets. In international markets should work indicate that this type of customer as the customer profile does not always coincide with that they have for the other Group companies.

In the first two years they began to notice the effectiveness of the share sales but market share was still scarce, as they were in the initial phase of the promotion. For this reason, they saw the need to increase promotional activities and especially make a better selection of them to achieve greater effectiveness and profitability. This promotion is focused on raising awareness of the product with Tastings, Contests, Showroom, Gastronomic, etc. The target consisted mostly of the company strengthen its presence in the culinary environment rather than the end consumer environment, since in this position would be possible to have a more advantageous access and less competitive.

“Oro de Nijar” brand has been linked to an image of extra virgin olive oil quality, with a very careful in the name, the bottle and case. Its geographical coverage is the local and national level mainly markets its products in the gourmet section of “El Corte Inglés”. As we can see the company has a bare image still in the domestic market since the end consumer does not recognize the brand, except locally. The differentiation in a market as mature is very difficult and the price is crucial.

At international level is present in Germany (Berlin) and Austria (Frastanz).

- *Internal changes*

As Human Resources policies implemented, it has outsourced “Caparros Group” staff for business tasks “Sol de Portocarrero, S.R.O.”. As we mentioned before, the company takes advantage of synergies with this business group to learn and grow every day. Equally dedicated staff the company is shared with other work of the Group, which on the one hand minimizes costs and organizational structure, but on the other hand then subtracts autonomy and in some cases commercial work effectively.

Therefore, we could say that it has maintained the policy of Human Resources had been applied previously in other group companies.

- *Future prospects and strategies*

Its customer portfolio has been growing year after year as well as the average purchase volume. Although, they still aim to continue increasing in the coming years both ratios. To this end, one of the actions taken by the company has been a website in Spanish and German, www.orodenijar.com, prepared for inclusion in other

languages like English and French.

In addition, they are working on the following activities in order to increase brand recognition by end users:

- ✓ Internationalization of the firm: Research and analysis of foreign markets.
- ✓ Marketing Plan Design Brand "Oro de Nijar".
- ✓ Design Business Plan for international markets.

By other hand but with the same objective, they have also collaborated with Extenda in the program "Promotion International", "Diagnosis" and other programs and activities, in order to boost sales of these products outside of Spain.

- **LA ALMAZARA DE CANJAYAR**

- *The company*

"La Almazara de Canjayar" is Olivier brand Santa Cruz, a food business located in Canjayar (Almería) and dedicated to the production and marketing of olive oil, virgin and "Gourmet", and olive.

The first oil extraction in the mill of the company was in January 1987 but the company was not established until 1997, when production begins. From that year until 2007 it has gone from milling 115,000 kg. 5,000,000 olive and has become to work with the production of 147 farmers have more than 8,000.

The mill has the quality certification ISO 9001:2000 from 2004 and the distinctive Certified Quality and Integrated Production of Andalusia (Cortijo Alto). Moreover, it won the Gold Medal as the first taste of virgin olive oils in 2002. The olive-producing area is located in the Valley Andarax in Alpujarra, at the gates of the Natural Park of Sierra Nevada. The olive varieties are the Lechín, Picual, Manzanilla, Arbequina and Hojiblanca.

- *Products and production*

Its extra olive oil "Cortijo Alto" has high quality and is commercialised in bottles of transparent glass of 250 and 500 ml and also in cans of 1 or 2,5 liters with a carefully honed image. This oil is also presented in a special edition gourmet segment intended gift box. Ecological greenish yellow with a fruity taste and smell, fresh and aromatic

that make it worthy of distinctive granted CERTIFIED QUALITY Quality Foods Andalusians.

- *International business model*

For the time being, the company has a small amount of exportations per year and also they are sporadic and not ruled. The major part of its amount of shipment is made through an importer with its own brand who is in charge of everything onwards. It means that the company only packets the oil and then everything related to the selling process is carrying out through the local importers.

- *Recognition and degree of internationalization*

As we have said before the company doesn't have representative brand recognition, even within the local market. Its business model is more similar to the bulk sale model thus they don't add a differentiate value to its product, delegating all the promotion and the selling subject to their distributors.

- *Penetration in the market. Obstacles and development*

The company doesn't know actually who are going to be their potential customers. The main reason behind this decision is the strong competitors (principally Italians) within the market which also are focused on the large retail and saturating the market. Once they have tried to penetrate by themselves through a mission of the Spanish Institute for External Trade (ICEX) but it was not as much successful as they expected before.

The distribution network to which we direct our oil is mainly a large American distributor through the Almería's importer but ordinarily resident in New York. We bottle oil importer's own brand and distribution control anything; he is responsible from the pickup at the factory and sold throughout the United States, through a large distributor, aimed at restoration, small and large trade with very good prospects.

- *Internal changes*

Regarding to the company's organizational structure, they haven't experimented any important change cause actually its production hasn't increased after the internationalization. He only relocated a part of its production in order to obtain higher returns.

- *Future prospects and strategies*

At the moment the company doesn't have any international planning or strategy besides the previously mentioned. Anyway, in the near future export manager expressed interest in keep looking for new distributors who can export its production to promising new markets.

- **CAMPOS DE ULEILA**

- *The company*

The location of "Campos de Uleila", between the Tabernas desert and the "Sierra de Filabres" enjoys an exceptional microclimate, because it enjoys the most hours of sunshine in Europe and also with climate stability profiling environment suitable for the growth and maturation of the olive. This allows us to provide quality oil unique in colour, aroma and flavour.

The oil comes from a plantation of olive and almond trees recovered after family-owned agricultural disused decades. Today the farm is a model example of sustainable biodiversity and ensuring respect for the environment.

- *Products and production*

The company only sells oil from their own harvest, limiting production to the 15,000 olive trees on the farm. His family tradition makes them be involved in all processes, giving priority to quality and dedication in the development of extra virgin oils. In addition the government has given the official seal for top quality Andalusian food: Quality certified.

Eco Coupage is its start product and it is commercialized in glass bottles of 0,5 liters and in containers of 5 liters.

- *International business model*

Probably this is the company that is in a more incipient internationalization phase when compared with other companies analyzed. Since the manager actually told me that they are immersed in the process of internationalization.

- *Recognition and degree of internationalization*

In order to get brand recognition in some foreign countries, the company has benefited from the collaboration and support of some official agencies which are designed to promote Andalusian Brands by encouraging promotional activities between export traders and buyers.

For instance, one collaboration led by Lándaluz (Business Association of Agro-alimentary Quality in Andalusia) and Extenda (Trade Promotion Agency of Andalusia), the company participated in a promotional display Andalusian food in CORA hypermarket chain in Hungary.

- *Penetration in the market. Obstacles and development*

The main obstacle that the company must address is the absolute ignorance of the international market. Therefore, they had to request some official agencies as I have said before to place its products and also they can make sure its success.

- *Internal changes*

Its organizational structure hasn't experienced any change a cause of his incipient internationalization. Generally they have not had time to experiment practically certain internal changes because they are beginning to see the first results of its first shipments.

- *Future prospects and strategies*

First of all the company wants to keep its international trade with their current clients, establishing its position within that markets and try to increase their sales. As they produce its own olive they have limits in their production and offer, then at the moment they want to gain those markets where the product is already placed.

- **CASTILLO DE TABERNAS**

- *The company*

“Castillo de Tabernas” group consists of the following companies "Health ID", the "Museum of Olive Oil" and brands Extra Virgin Olive Oil Gourmet "Castillo de Tabernas", "Benjamin", "Cadet" Extra Virgin "Indaloliva "and" Oleospa ". Castillo de Tabernas is a food company in the province of Almería, dedicated to the production and marketing of olive oil, commercial headquartered in Tabernas Almeria and olive trees. The company took the name of the castle that stands on the hill of the town of Tabernas. The company was founded by Rafael Ubeda in 1993 when he created the “Cortijo Olivar del Desierto”, with an area of 470 hectares and 90,000 olive trees and provided with drip irrigation systems. It is considered the most olive oil

- *Products and production*

According to his data is one of the leading international producers of Extra Virgin Olive Oil Gourmet, with only 0.1 second maximum acidity, which is marketed in Spain, rest of Europe and the United States and maximum acidity Extra Virgin less than 0.2 °.

- *International business model*

After consolidating the production project of olives and olive mill farms, concentrated on marketing and marketing strategies, and to penetrate international markets. They want to carry out its consolidation within US markets and developing business expansion plans which include Japan, China, Brazil and México.

- *Recognition and degree of internationalization*

Olive oil Castillo de Tabernas was present at one of the deli product fairs in the world, 'Summer Fancy Food', held in New York. The Fancy Food assistance aimed to help the expansion plan in the United States.

- *Penetration in the market. Obstacles and development*

The manager told us that they found a lack of initial funding as to develop the project had to acquire land owned. Later, after becoming a collection of all the olive trees, these were performing all the tasks of planting.

From the beginning, the company was clear which was going to be its product: quality extra virgin olive oil. To this end, it was necessary seek out the best experts out of Almería due to the lack of knowledge on this field in this region (no deep-seated culture). Then they recruited some experts from other experienced regions for the olive growing and the olive oil extraction.

Moreover, they faced with the problem that in Almeria there was no other oil brand gourmet marketed, so that it was necessary to educate consumers and give them information about our new oil production and the high quality of our product.

Besides all these obstacles, the company found a fairly saturated market by other companies that already had consumer recognition.

The decision to produce their wine gourmet oil in part by the fact that national and international level, yet there were hardly gourmet olive oils. Then the company had to undertake to transmit its oil properties both professionals and consumers.

- *Internal changes*

The company structures the number of employees in production, for the project in operation and has increasing international sales network, consolidating and enhancing its own structure to new sales representatives to work with variable remuneration for the company.

With regard to human resources management regarding internationalization, the recruitment and selection of staff have been carried out based on mainly academic training and also have also been taken into account in language knowledge, new technologies and networks social. the company has kept training their employees (primarily those employees involved in internationalization) in order to adapt to new ways of working.

- *Future prospects and strategies*

Its main objective is increasing international market positioning and for that they have defined the following alternatives or strategies to carry out:

- ✓ Further work on the consumer information on spreads of our products and the different qualities and uses of olive oil.

- ✓ Creating products for food differentiated and targeted at new consumer segments.
- ✓ Creating non-food product lines, based on the benefits for the skin.

- **CASTILLO DE CANENA (JAÉN, ANDALUCIA, SPAIN)**

By other hand, with the goal of comparing and defining some interesting strategies and experiences lived by other older companies within the international market and that also have more market share, I have chosen “Castillo de Canena” located in Jaén thus it is a clear example of know-how.

- *The company*

“Castillo de Canena” is a family business that combines traditional wisdom with the most advanced technology and scrupulous respect for the environment. The Castillo de Canena Family Reserve Arbequina Extra Virgin Olive Oil exemplifies the team’s efforts to focus on family and community companies.

- *Products and production*

The company with a history that begins in 1780 produces Reserve oils by fertigating, or applying fertilizer through an irrigation system to sweeten and balance the crops, creating consistency in flavor and aroma. The olives are collected by hand at the optimal level of maturation and cold-milled in less than three hours after harvest, which guarantees freshness, healthiness and low acidity. Its start product costs \$25/500 ml bottle.

- *Recognition and degree of internationalization*

Even the company was the first Spanish Oil company winner of the prestigious “sofi Awards” Prize in the 2011 edition.

- *International business model*

The company have been participating in some recognized globally awards and also is working on the consolidation of its product as high quality in the mind of the consumer. Continually they have to be disclosed in any way due to the confusion and

lack of knowledge of the final consumers and distributors both domestically and internationally.

- *Penetration within the market. Obstacles and development.*

At the beginning of the internationalization they found very saturated market. The large number of products offered and its unknown product created some confusion.

Although the product is considered high-end, in general consumers have been able to see how the Spanish producer has put normal oil or mediocre in a better package and that what he described as "gourmet" then also they had to deal with this widespread belief.

- *Internal changes*

At the beginning of the process the company started with a commercial director. Later the company became involved in a plan PIPE (Plan Iniciación Promoción Exterior) which has aims to support the initiation and consolidation of the international presence of Spanish SMEs. With this plan, a partner PIPE came to work in the company who remained with the export manager position. After several years, other three export managers were incorporated into the company and they are specialized on different management areas:

- First export manager is in charge of Europe and a part of Spain
- Second export manager works for the Asiatic market and another part of Spain.
- Third export manager is controlling the American market and the last part of the Spanish market repartition.

What it means is that a total of 4 people are fully involved in the export.

- *Future perspectives and strategies*

Its main objective is to further strengthen and open new markets in countries which have a chance of success previously. At this point, the company is exporting in more than 42 countries.

So far, their experience has shown that the best way is to visit potential distributors in each country: actually see the products they have, warehouse, distribution type they make, etc. Not forgetting, continue to invest in high quality, especially for the process innovation and environmental care.

7.2 IMPROVEMENT PROPOSALS

All the information mentioned earlier provides enough support to individually meet the reality of each of the companies. Now, in this section of improvement proposals we try to provide a kind of guide for these companies in order to improve their internationalization process. Taking into account those strengths, weaknesses, opportunities and threats faced by the companies.

First of all, a common weakness of these companies meets is the low level of brand recognition in contrast to the experienced and prestigious brands like “Castillo de Canena” and “Castillo de Tabernas” and ever more popular “Oro del Desierto”. While it is true that companies like “Oro de Nijar” has endeavored to gain national and international recognition such as certificates and awards making them better known than the rest. Then its high product quality and increasing positive image can be considered as one of its greatest strengths.

Furthermore, a common strength of these companies meets is the high level of innovation and production technology. These companies have intensive and latter-day crops which help ensure productive campaign and also are less likely to suffer large and unexpected losses.

As we have seen in every company, they have experienced only small changes in the organizational structure to affront the international trade. Although, they needed to adapt the company in order to succeed in internationalization. Thanks to the characteristics of the companies, its size, organizational structure, etc. they can take advantage of its flexibility and facility for the decision making that requires the international market. But, this organizational structure would not validate if the number of markets grow and only export manager had to manage each of them. By other hand if you look at the division of tasks performed by “Castillo de Canena” or

“Castillo de Tabernas”, they have a clear and defined division of tasks division of tasks focused on the internationalization. These divisions of the export areas give them even greater flexibility and autonomy in decision-making.

These companies have taken advantage from the external market placing their oils in different markets where previously they have been aware of those opportunities or niches. Their common philosophy is based on the idea of selling small amounts of products but always keeping high value inside of them. The olive oil from Almería which can be found within the foreign markets around the world is characterized as gourmet’s products because it accomplishes the following features:

- They are high-end products with quality ingredients.
- The production is generally more limited.
- In many cases, it is handmade and natural products, highlighting sometimes regional or ethnic character.
- Its presentation and packaging is higher quality care and in the case of conventional food products, so that the product is different and stands.
- They are not essential products, so their use tends to be casual and be closely related to the economic situation of the country.
- Its price is usually higher than conventional food products.
- Its distribution is more limited to specialty shops, sections or special and differential shelves in supermarkets.

In terms of distribution, it is advisable to contact importers or distributors specializing in gourmet products. In this sense, they must pay special attention to whether or not brand development. With regard to the distribution channels, Gourmet and delicatessen stores are the main selling points chosen by selling abroad. These businesses are focused on selling high quality food products that, by their originality, craftsmanship, presentation, etc. Not usually found in a conventional supermarket. The product offering is usually very broad and range from wines, cheeses, liqueurs, oils, chocolates, sweets, salt or typical regional and international products. They are high quality products that have a high added value.

The case of “Campos de Uleila” which at the moment is at the beginning of its internationalization is advisable to rely on subsidies and agencies as the other companies have been doing at first.

- The **Spanish Institute for Foreign Trade (ICEX)** provides an alternative way of experiences and information on internationalization, through these services:
 - Design and execute trade promotion programs in foreign markets.
 - Prepares and disseminates information on the product offering Spanish and international markets.
 - Training of professionals in foreign trade.
 - Boost investment projects, industrial or business cooperation in foreign markets.
 - Encourages foreign investment attraction to Spain

As part of his performance, figure the Initiation Plan Promotion Outdoor (PIPE Program), which aims to help small and medium businesses exporters to become stable, and which involved more than one olive thirty companies in the region.

- The **Trade Promotion Agency of Andalusia (EXTENDA)**: a company owned by Andalusia's Regional Government, in conjunction with the Andalusian Chambers of Commerce, dedicated to the international promotion of Andalusian products and the expansion of Andalusian business in foreign markets. Services: regional promotion campaigns, support of Promotional Plans Made by Andalusia's Export Associations, foster expansion, "Wings to Internationalization" Awards, individual projects, etc.
- The **Horeca Channel** (acronym of Catering) refers to everything related to commercial distribution to such customers, whether machinery, supplies or raw materials supply. It is considered a transmitter channel of food and culture and it keeps constant innovation and adaptation to new consumer demands.

- An **export credit agency** (known in trade finance as ECA) or Investment Insurance Agency. The aim of these agencies is to stimulate the economies of exporting countries, helping export companies to conduct business abroad and may be regional or international depending on the scope.

Moreover, the potential of the Internet to reach out and get new customers is indisputable, provided the offer is sufficiently wide, are achieved competitive prices and offer a proper service quality. In addition, e-commerce continues to grow despite the crisis and enable online business a small business to compete with a multinational. Therefore, these companies should consider the new possibilities offered by electronic commerce and Internet distribution, and assess whether they have or can develop a competitive advantage to enter this new channel, taking into account the challenges that it carries (multichannel Implementation, logistics, imaginative techniques on the web, etc.).

As for the origin of most gourmet products, Italy and France are who dominate this niche, supported by its image culinary tradition. While in general the Spanish product is known and respected by professionals and industry experts, the majority of consumers are not yet familiar with the qualities and attributes of Spanish gourmet product. But, thankfully, the Spanish gourmet product has won a lot in image in recent years and there are not many brands that have been consolidated into foreign markets. On the other hand, more and more importers or distributors are purchasing white label.

Thus, this situation presents an opportunity for SMEs producing who are developing emerging levels of your brand. As this special food and representatively high priced for the quality of products, it is more advisable to position in the segment medium/high or high/high, addressing those customers less price sensitive. Since most companies market their products chiefly in Europe in more than chiefly already saturated market, it may be desirable to target markets where it is known growing interests in gastronomy and there is a significant segment of the population with

purchasing power willing to consume high quality products/gourmet. Countries like South Korea, Singapore, Czech Republic, etc.

8. CONCLUSIONS

After developing many different analyses and making a deep study of the olive oil sector characteristics we have obtained the knowledge enough to reach some conclusions from this project.

When studying olive oil sector's frame, we reach several conclusions. Firstly, we can have an idea of its global current situation. Although Spain is the largest producer of olive oil in the world, this sector is not one of the most important sectors according to its contribution to the Spanish GDP. We also have realized of the more and more expenditure containment due to the drop in purchasing power all over the majority of European countries, including the hard price rises and the strong competition between the major olive oil producers countries.

In even greater depth, we have made an analysis of the companies located in Almería. This region is a land of contrasts thus it meets the climatic conditions for the cultivation of various fruits, like the olive. The absence of excessive cold in winter, good soil and plenty of sunshine make olive groves are cultivated with high productivity and high quality. In these conditions, good management adds that farmers do in this situation, so you get an olive oil with a very high average quality, compared to other provinces with higher production in quantity. Therefore, these companies decided to relocated part of the production abroad in order to overcome the almost non-existent local demand. In this manner, we have addressed these different companies and we have studied its internationalization strategies undertaken. Surprisingly, we have seen how these small businesses have found their small part in the market and also their future prospects are quite promising.

All in all, I would like to express my gratitude to my tutor of this project Mrs. Pilar Jerez Gómez. I have to thank you so much for her great dedication to this project. You were really aware of my questions and problems. It has been my luck, pleasure and honour to have learned a lot here and during my degree studies by Mrs. Jerez and I only hope that this project can cover your expectations.

I also want to show my gratitude to you for taking your time to read and hopefully enjoy a project in which I spent so many hours.

9. APPENDIX

Appendix 1. Cover Letter

Estimado/a Sr./Sra.,

Me dirijo a usted desde el Departamento de Economía y Empresa de la Universidad de Almería. Mi nombre es Pilar Jerez, y soy profesora titular en dicho departamento. Actualmente estoy dirigiendo el proyecto fin de máster a la alumna Pilar Martínez, dentro del International Master in Business Administration and Modern Languages.

El objetivo del proyecto fin de máster es analizar la evolución de las empresas del sector del aceite de oliva en Almería en su orientación estratégica hacia la internacionalización, y los cambios que les ha supuesto lanzarse al mercado internacional. Concretamente:

- Obstáculos iniciales con los que se encontraron o se están encontrando, tanto externos como internos, y cómo los superaron o los están intentando superar.
- Cambios concretos a nivel interno que han debido realizar o están realizando: cambios en la estructura organizativa de la empresa, en el número de empleados, en las políticas de recursos humanos: reclutamiento y selección de personal, diseño de puestos de trabajo, formación y desarrollo, retribución...
- Perspectivas de futuro y actuaciones que quieren implementar en el futuro en relación a la estrategia de internacionalización.

La información que requerimos será tratada con absoluta confidencialidad. Se trata de un trabajo interno del máster del que ustedes recibirán una copia si así lo desean.

Les estaríamos muy agradecidos si accediesen a colaborar. Creemos que el trabajo podría ser muy interesante en cuanto a análisis de un sector importante en la economía almeriense, y de un aspecto: la estrategia de internacionalización, del que hay escasa información.

Por favor, no duden en contactar conmigo si necesitan cualquier aclaración o quieren hacernos llegar cualquier sugerencia o comentario.

Atentamente,



Pilar Jerez

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CASTILLO DE CANENA <http://www.castillodecanena.com/>

CAMPOS DE ULEILA <http://www.camposdeuleila.es/>

CASTILLO DE TABERNAS <http://aceitecastillodetabernas.es/>

ORO DEL DESIERTO <http://www.orodeldesierto.com/>

ORO DE NIJAR <http://www.ordenijar.com/>

LA ALMAZARA DE CAJAYAR <http://www.laalmazara.com/>

Consejo Oleícola Internacional (COI) <http://www.internationaloliveoil.org>

Agencia para el Aceite de Oliva
<http://aplicaciones.mapa.es/pwAgenciaAO/General.aao>

Interprofesional del Aceite de Oliva Español
<http://www.interprofesionaldelaceitedeoliva.com/portal/>

ASOLIVA - Asociación Española de la Industria y el Comercio Exportador del Aceite de Oliva <http://www.asoliva.es>

ANIERAC - Asociación Nacional de Industriales Envasadores y Refinadores de Aceites Comestibles <http://www.anierac.es>

Ministerio de Agricultura, Alimentación y Medio Ambiente -
<http://www.magrama.gob.es/es/>

FIAB - Federación Española de Industrias de Alimentación y Bebidas
<http://www.fiab.es>

ICEX – Instituto Español de Comercio Exterior <http://www.icex.es>

EUROSTAT
http://epp.eurostat.ec.europa.eu/portal/page/portal/international_trade/data/databa se

Secretaría de Estado de Comercio – S.G. de Inversiones Exteriores
<http://datainvex.comercio.es/index.htm>

Agencia Andaluza de Promoción Exterior <http://www.extenda.es/>

Ministerio de Economía y Competitividad <http://www.mineco.gob.es/>

Federación Española de Industriales Fabricantes de Aceite de Oliva
<http://www.infaoliva.es/>

Olivareros y Almazareros de España, S.A. <http://www.oliaesa.com/Inicio.asp>

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