

STUDY TRIP PORTUGAL

MAY 16 -21, 2011



vab



Vereninging
Agrarische
Bedrijfsadviseurs

www.vabnet.nl

INTRODUCTION AND GOAL STUDYTRIP PORTUGAL

Welcome on this trip to Portugal!

The main goal of this studytrip is to give you a general overview of the primary agricultural and on agriculture based activities in Portugal. The programme offers you a wide variety of items in the region Alentejo and Lissabon.

Besides agriculture there will be time to visit a few touristic hotspots of this country.

We wish you a very instructive and pleasant trip!

Project Group International Affairs,
Association of Consultants in Agriculture

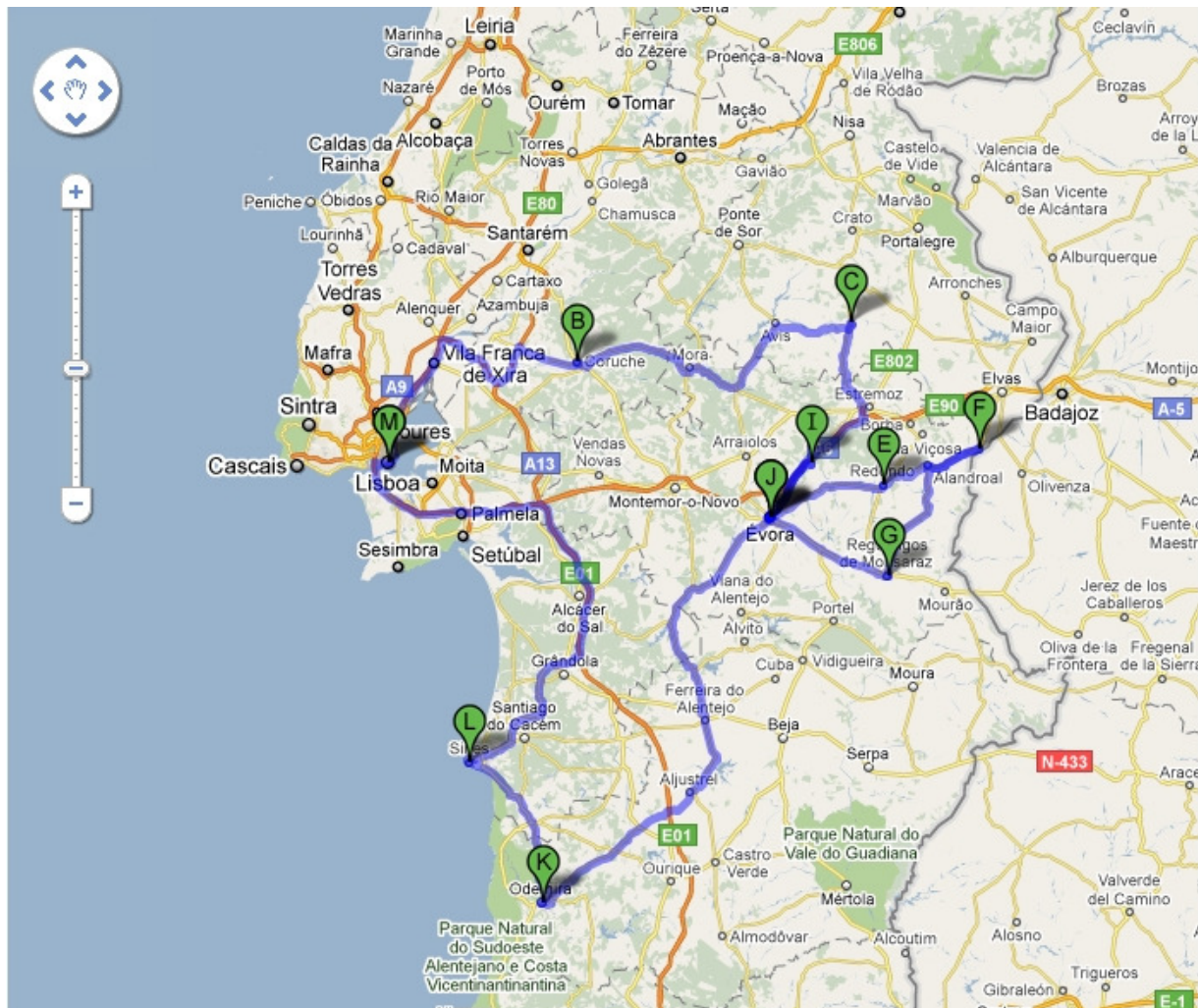
Hein-Willem Leeraar
Fred Boersma
Tjalling de Jong
Han Meurs
Yvonne van de Camp

Vereniging Agrarische Bedrijfsadviseurs | P.O. Box 1634 | 3800 BP AMERSFOORT NL

T. 0031 33 45 35 330 | E info@vabnet.nl | I www.vabnet.nl

INDEX

INTRODUCTION AND GOAL STUDYTRIP	2
PORTUGAL	4
PROGRAMME STUDYTRIP FROM DAY TO DAY	8
DUTCH PARTICIPANTS STUDY TRIP 2011	18
COMPANIES DUTCH PARTICIPANTS STUDY TRIP 2011	20
APPENDIXES	21



AGRICULTURE IN PORTUGAL

Agriculture in Portugal is based on small to medium-sized family-owned dispersed units. The extent of cooperative organization has been reaching a greater importance with globalization. Portugal produces a wide variety of crops and livestock products. Forestry has also played an important economic role among the rural communities. In 2001, the gross agricultural product accounted for 4% of the national GDP.

Portugal is one of the world's largest producers of wine and cork. The land area of slightly more than 9.2 million hectares was classified as follows (in thousands of hectares in 2001): 2,755 arable land and permanent crops (including 710 in permanent crops), 530 permanent pasture, 3,640 forest and woodland, and 2,270 other land.

History

Most of Portugal's farms have a small area devoted to diversified intensive farming, like these in the Oeste subregion. Agriculture, forestry, and fishing employed 17.8 percent of Portugal's labor force but accounted for only 6.2 percent of GDP in 1990. With the principal exception of the alluvial soils of the Rio Tejo (Tagus River in English) valley and the irrigated sections of the Alentejo, crop yields and animal productivity remained well below those of the other European Community (EC) members. Portugal's agro-food deficit (attributable mainly to grain, oilseed, and meat imports) represented about 2.5 percent of GDP, but its surplus on forestry products (wood, cork, and paper pulp) offset its food deficit.

The region of Alentejo is known as the "**breadbasket of Portugal**" due to its extensive farming and cereal production. A number of factors contributed to Portugal's poor agricultural performance. First, the level of investment in agriculture was traditionally very low. The number of tractors and the quantity of fertilizer used per unit area was one-third the European Community average in the mid-1980s.

Second, farms in the north were small and fragmented; half of them were less than one hectare in size, and 86 percent less than five hectares.

Third, the collective farms set up in the south after the 1974-75 expropriations due to the leftist military coup of 25th April 1974, proved incapable of modernizing, and their efficiency declined.

Fourth, poor productivity was associated with the low level of education of farmers. Finally, distribution channels and economic infrastructure were inadequate in parts of the country.

According to government estimates, about 9,000 km² (2,200,000 acres) of agricultural land were occupied between April 1974 and December 1975 in the name of land reform; about 32% of the occupations were ruled illegal. In January 1976, the government pledged to restore the illegally occupied land to its owners, and in 1977, it promulgated the Land Reform Review Law. Restoration of illegally occupied land began in 1978.



Portuguese wines include the famous Port wine which is produced from vineyards of the Douro Valley in northern Portugal. Following its adhesion in 1986 to the European Economic Community (EEC), now the European Union (EU), Portugal's agriculture, like in other EU member states, has been heavily shaped by the Common Agricultural Policy (CAP). With the reform of the EU's Common Agriculture Policy, a significant reduction in the number of producers through consolidation (especially in the Norte and Centro regions) resulted in the end of traditional, subsistence-like based agriculture.

In 1998, 28% of the land was considered arable. Of the 26,000 km² (7 million acres), 74% was cultivated with seasonal crops and 26% was under permanent crops. In 2001, the gross agricultural product accounted for 4% of GDP. Estimates of agriculture production in 1999 included potatoes, 1,150,000 tons; tomatoes, 1,176,000 tons; corn, 1,092,000 tons; wheat, 400,000 tons; olives, 262,000 tons; rice, 159,000 tons; and rye, 52,000 tons. Production of olive oil reached 36,000 tons in 1999. Wine, particularly port and Madeira from the Douro region and the Madeira islands, is an important agricultural export; production totaled 679,000 tons in 1999, down from 1,137,000 tons in 1990. Portugal is the world's seventh-largest producer of wine, although Portugal's wines are mostly unknown internationally apart from port and rosé. Under the influence of EU policies, vineyard areas have been reduced in recent years. In 2001, the value of agricultural products imported by Portugal exceeded that of agricultural exports by \$2.56 billion.

Major agricultural products

Portugal's climatic and topographic conditions allow for an extremely large number of crops, including olives, figs, citrus, mushrooms, sunflower, tomatoes, cereals, bananas (in Madeira Island) and pineapple (in São Miguel Island). Wine, table grapes, leaf vegetables, dairy, tomatoes for processing, rice, sugar beets, mushrooms, cork and olives are very competitive. Improved marketing practices since the 1990s, enabled fresh horticultural and fruit products of Portuguese origin to become widely demanded in both the domestic and export markets.



Wines

The quality and great variety of wines in Portugal are due to noble castas, microclimates, soils and proper technology.

Official designations: Quality Wine Produced in a Specific Region (QWPSR) or VQPRD - Vinho de Qualidade Produzido em Região Demarcada.

These are the most protected wines and indicates a specific vineyard, such as Port Wine, Vinhos Verdes, and Alentejo Wines. These wines are labeled D.O.C. (Denominação de Origem Controlada) which secures a superior quality.

Wines that have more regulations placed upon them but are not in a DOC region fall under the category of Indicação de Proveniência Regulamentada (IPR, Indication of Regulated Provenance).

Agribusiness

Among the largest companies in the agricultural and agribusiness sector of Portugal are such examples as Grupo RAR (owner of Vitacress), Companhia das Lezírias, Nutrinveste, Sumol + Compal, Sogrape, Derovo, Frulact, Amorim, Delta, Valouro and Lactogal.

Retail market and distribution

Competitors are always well represented at Portuguese agricultural fairs and food-related shows. Other nations advertise in Portugal's food magazines and on television, and join with hotels in weekly menu promotions, complete with food products, cooks, exhibits and decorations.

Competition also heats up among Portuguese and foreign firms over extremely expensive supermarket shelf space. Suppliers fight to maintain and expand exposure of their products as the number of supermarkets boomed since the 1990s. The struggle is getting even more intense as larger stores continue to carry more private label products, constricting shelf space even more for branded products. Modelo Continente, Jerónimo Martins, Lidl and Auchan are the biggest retailers.

Local manufacturers felt the squeeze on profit margins as big retailers preferred to cut costs by buying from neighboring countries. France and Spain dominate consumer-ready frozen and non-frozen food products. Spanish fruits and horticultural products are easily found all over Portugal's supermarket and supermarket chains. The European Union, South America, the Middle East and China also compete with dried fruits, tree nuts, pulses and prepared product markets.



With a land area about the size of the North American state of Indiana, Portugal maintains quite a varied distribution network. The food distribution structure includes wholesalers, retailers (supermarkets, supermarkets, cooperatives, small businesses, convenience stores), institutions and associations. Portuguese retailers generally make their purchases through a broker from the manufacturer or directly from a distributor, cash-and-carry store, traditional wholesaler or from retailer associations and cooperatives. The associations and cooperatives, made up mostly of small store owners, help members increase purchasing power, compete with larger stores and access training and trade seminars. But the role of import agents and traditional brokers declined, and retailers are becoming more adept at direct importing.

Hypermarkets and supermarkets, including joint ventures between the Portuguese and French, control over 50 percent of retail food sales. The Portuguese government put the brakes on the tremendous growth of hypermarkets in an effort to protect smaller retailers. With their high buying power, the hypermarkets can be more competitive in pricing and could easily squeeze smaller businesses out of the marketplace.

Organic farming

Organic farming in Portugal has steadily increased in the past years. From only 73 producers in 1993, it rapidly grew to more than 1,500 in 2005. Today, more than 2,000 km² are managed organically, which testifies to the prevailing dynamics. The farmers' sudden interest in organic agriculture clearly has to do with the financial support offered by the European Union and higher market prices. In some cases, such as the olive groves of the northern and central regions, traditional farming approximates organic farming methods, which eases conversion. With horticulture or orchards, the change is not so easy, and therefore there are not as many farmers converting. The supply is still less than the demand, reflecting the fact that organic farming is still at an initial stage. The Portuguese are growing more conscious of health and the environment, which explains the rising interest in natural foods and fibres. Their increasing purchasing power encourages this development. However, these positive factors for the expansion of organic production may not be enough to guarantee a continuous increase in the future, since several obstacles hinder the farmers' performance.

Education, training and research in agriculture

There are several vocational and higher education institutions devoted to the teaching of agricultural sciences in Portugal. Almost all state-run polytechnic institutes (there are 15 across the country), have a school of agriculture awarding bachelor's and masters' degrees in the subject. The Escola Superior Agrária de Coimbra, belonging to the Polytechnical Institute of Coimbra, is the oldest polytechnic institution of agriculture. There is also a number of universities awarding bachelor's, masters' and doctorate degrees in varied agricultural science subfields. The Instituto Superior de Agronomia (ISA), the university school of agronomy of the Technical University of Lisbon, is among the oldest, largest and most prestigious in the country regarding both the teaching of agricultural sciences and research. Other public universities like the University of the Algarve and the University of Évora, have departments for both agronomy and agriculture, or related engineerings. The Instituto Nacional dos Recursos Biológicos (INRB) is the national research institute for agriculture and fisheries.

(Source: www.wikipedia.org).

PROGRAMME STUDYTRIP

D A Y 1 - M O N D A Y M A Y 1 6

14.30 hrs. Reporting at Schiphol Airport. Make sure to be in time!
Welcome by Mr. Jan Maat, our host during the tour.

16.50 hrs. Flight from Schiphol to Lissabon with Transavia:
HV 5951 Amsterdam - Lissabon 16.50 – 18.40

19.00 hrs. Bustransfer to Hotel Albergaria S. Lourenço in Porto Alto
Bus Company Isidoro Duarte, www.isidoroduarte.pt

20.30 hrs. Check- in hotel Albergaria S. Lourenço in Porto Alto

Address:
Albergaria S. Lourenço****
Avenida Mário Mendes Delgado , 41 Porto Alto
2135-115 Samora Correia
T: 00 351 263 654 447
www.hotelslourenco.com



D A Y 2 - T U E S D A Y M A Y 1 7

- | | |
|------------|---|
| 7.30 hrs. | Breakfast |
| 8.15 hrs. | Checking out and departure by bus |
| 9.00 hrs. | <p>Arrival at the goat farm Hulshof in Coruche
The two brothers Willy and Paul Hulshof have a goat farm with their own milk processing and direct sale system.</p> <p>Address:
Cabra dÓuro, Agropecuária, Lda, Quinta da Bico, Foros do Rebocho, 2100-040 CORUCHE
T: 00 351 243 618 810
T: 00 351 342 618 248
I: www.cabradouro.com</p> |
| 11.00 hrs. | Departure for Fronteira |
| 12.30 hrs. | <p>Lunch in café-restaurant A Cascata in Ervedal - Avis</p> <p>Address:
Estrada Nacional 243, 7480-285, Ervedal – Avis
T: 00 351 934 864 222</p> |
| 14.30 hrs. | <p>Arrival at pork farm in Fronteira
The owner of this farm lives in the north of Portugal.
Manager Shahab will guide us around.</p> <p>Address:
Barreiras Brancas, Apartado 6, 7460 Fronteira
T: 00 351 932 367 373
E: shahab@sapo.pt</p> |



16.00 hrs. Departure for a sight-seeing tour via Sousel (olive trees) to Estremoz and Vila Viçosa.

Estremoz is internationally known for its marble
I: www.estremoz.pt

16.30 hrs. Visit to Plácido José Simões S.A. in Vila Viçosa

Plácido José Simões S.A. is a marble factory with own quarries.
Welcome by Mr. Martins Simoés

Address:
Estrade do Paúl, 7160-999 Vila Viçosa
I: www.pjsimoes.com

18.00 hrs. Departure

19.00 hrs. Check-in hotel Albergaria Vitoria in Évora

Address:
Hotel Albergaria Vitoria****
Rua Diana de Lis, 5 | 7005 - 413 Évora - Portugal
T: 00 351 266 707 174
I: www.albergariavitoria.com

19.30 hrs. Diner in Restaurante Repas

Address:
Praça de Maio 10, Évora
I: www.guiadosrestaurantes.pt



D A Y 3 - W E D N E S D A Y M A Y 18

7.00 hrs.	Breakfast
7.50 hrs.	Departure
8.15 hrs.	<p>Arrival at dairy farm Maat in Redondo This farm with 400 hectares is bought 25 years by the Maat family. Mr. Olaf Maat and his wife Teresa Maat-Alves are the owners since 23 years. They have 400 dairy cattle and 400 calves.</p> <p>Address: Herdade do Carapetal, 7170 – 107 REDONDO T: 00 351 2366 909 659 T: 00 351 917 345 764</p>
10.00 hrs.	Departure
10.15 hrs.	<p>Visit at Adega ACR, a wine factory in Redondo. Guided tour by Mrs. Teresa Maat-Alves</p> <p>Address: Estrada de Évora, 7170-999 Redondo T: 00 351 266 989 100 I: www.acr.com.pt</p>
12.00 hrs.	Departure
12.45 hrs.	<p>Lunch in restaurant O Mateus in Juromenha</p> <p>Address: Rua Sto António 45, Juromenha</p> <p>Afterwards a short walk to view the old castle and the border with Spain.</p>



<p>14.15 hrs.</p>	<p>Arrival at the fruit farm of Theo Vogelaar in Juromenha. This farms has 300 hectares of fruit and a direct sale system.</p> <p>Address: Juro Frutas, Herdade de Monte Branco, 7250-243 Juromenha. T: 00 351 268 969 324 T: 00 351 917 226 168 E: tjuofrutas-lda@sapo.pt I: www.vogelaar.com/htm/juofrutas.htm</p>
<p>15.15 hrs.</p>	<p>Departure for a tour around the east part of the province Alentejo, via Alandroal to the historical site of Reguengos de Monsaraz.</p> <p>The views from its 13th Century castle walls are panoramic over both the plains of the Alentejo, the waters of the new Dam and views towards the Spanish boarder.</p>
<p>17.00 hrs.</p>	<p>Boat trip on the reservoir lake Barragem de Alqueva. This lake is de largest reservoir lake in Western Europe. Boat company Amieira Marina in Amieira Village I : www.alqueva.eu I : www.amieiramarina.com</p>
<p>18.30 hrs.</p>	<p>Visit to the dam in Barragem de Alqueva</p>
<p>19.15 hrs.</p>	<p>Departure</p>
<p>20.00 hrs.</p>	<p>Back in the hotel in Évora and diner in restaurant O Cruz</p>
<p>Address:</p>	<p>Plaza de Maio, Évora</p>
	
	

D A Y 4 - T H U R S D A Y M A Y 19

- 8.15 hrs. Breakfast
- 9.00 hrs. Checking out and departure
- 9.30 hrs. Arrival at the farm of Siebo and Catarina Foreman. They have 25 hectares and keeping Alentejana suckler cows.
Siebo Foreman will guide us around their small farm and tell us about the farm and the cork production and industry in this region.
- Address:
Monte Novo Horizonte, 7100-300 Evoramonte.
T: 00 351 268 959 283
www.campingalentejo.com
- 11.00 hrs. Departure for a visit to the cork procession factory Cortiçare – Arte em Cortiça in Azaruja. Our host is Joaquim Silvestre Jinó Caeiro
- Address:
Parque Industrial, Rua A 7, 7005-109 Azaruja
T: 00 351 266 977 276
T: 00 351 966 776 615
- 12.30 hrs. Departure to the arable farm annex contractor of Cuno and Lucia van der Feltz in Évora. Lucia also has some apartments for rent and she is a guide for the city of Évora.
- Lunch at the farm.
- Address:
Povindim Serviços Agrícolas, Lda, Monte da Serralheira, 7000-788 Évora.
T: 00 351 266 741 286
T: 00 351 969 064 330
I: www.monteserralheira.com



14.30 hrs. Visit to the bank Crédito Agrícola in Évora

16.30 hrs. Departure to the south-west coast of Portugal

18.00 hrs. Checking in at hotel Apartamento Sinerama in Sines

Address :
Hotel Apartamento Sinerama***
Rua Marquês de Pombal, 110
7520-227 Sines – Alentejo
T: 00 351 269 000 100
I: www.tdhotels.pt

19.00 hrs . Diner in restaurant Cais da Estação




Address:
Avenida General Humberto Delgado 16
7520-104 Sines
T: 00 351 269 636 271
I: www.caisdaestacao.com



D A Y 5 - F R I D A Y M A Y 20

- 7.30 hrs. Breakfast
- 8.00 hrs. Checking out and departure
- 9.15 hrs. Arrival at nursery Atlantic Growers in Odemira.
Welcome by Mr. Paul Dolleman (Horticonsult) and Mr. Ferry Enthoven (Atlantic Growers)
- Address:
Boavista dos Pinheiros, 7630-033 Odemira
T: 00 351 283 386 259
T: 00 351 917 201 376
- More information: see appendix.
- 10.30 hrs. Departure and meeting point with Mr. José Furtado at São Teotónio's roundabout
Mr. Furtado is consultant at AgriQualidade and will join us during the next three visits.
- T: 00 351 241 689 066
E: agq@agq.mail.pt
- 10.55 hrs. Visit to the strawberry farm Carvalho Vidal & Rosa, LDA of Mr. João Maia in Odemira
- Address:
Monte Nv, Alcaria-São, Teotónia, Odemira
- 11.10 hrs. Departure
- 11.15 hrs. Visit to Berry Port Strawberry and Raspberry farm in Zambujeira do Mar.
Welcome by Mr. Arnaldo Herren and Mr. Paul Dolleman
- 12.45 hrs. Lunch at Zambujeira do Mar



<p>14.30 hrs.</p>	<p>Visit to Camposol nearby Vila Nova de Mil Fontes on the way back to Lisbon</p> <p>This firm is a leader in football fields grass, supplied in the past Real Madrid's stadium as well as other known clubs and also developing horticulture such as spinach, carrots and others</p> <p>Address: Herdade dos Nascedios 7645-909 Vila Nova de Milfontes T: 00 351283 990 010 I: www.camposol2.com</p>
<p>16.00 hrs.</p>	<p>Departure for Lissabon, optional: visit to Sebútal with a harbour</p>
<p>18.00 hrs.</p>	<p>Check-in hotel Sana Reno in Lissabon</p>
	<p>Address:</p>
	<p>Sana Reno Hotel***</p>
	<p>Avenue Duque D'Ávila 195/197, 1050-082 Lissabon</p>
	<p>T: 00 351 213 135 000</p>
	<p>I: www.sanarenohotel.com</p>
<p>20.00 hrs.</p>	<p>Sight-seeing Lissabon Alfama by bus and diner in a small fado restaurant</p>
	<p>Our guide is Mrs. Josephine Lucassen</p>
<p>23.00 hrs.</p>	<p>Back to the hotel</p>
	 

D A Y 6 - S A T U R D A Y M A Y 21

- 8.30 hrs. Breakfast
- 9.00 hrs. Touristic program Lissabon with our guide Mrs. Josephine Lucassen
T: 00 351 966 361 983
- 12.00 hrs. Lunch and afternoon program at own arrangement
- 17.00 hrs. Back in the hotel and departure to the Airport
Flight nr. HV 5952 Lissabon - Amsterdam 19.20 – 23.10
- 23.10 hrs. Arrival at Schiphol Airport



DUTCH PARTICIPANTS STUDY TRIP 2011

	Name	Company	Tel.	E-mail	Photo
1	Sietze Algra	GIBO Groep	06-22710402	salgra@gibogroep.nl	
2	Fred Boersma	Fred Boersma Tuinbouw Advies	06-27160115	fred@boersmatuinbouwadvies.nl	
3	Yvonne van de Camp	Vereniging Agrarische Bedrijfsadviseurs	06-51625382	yvonnevandecamp@vlb.nl	
4	Herman Hofstee	Dijksterhuis & Uil	06-53667520	herman.hofstee@du-groep.nl	
6	Tjalling de Jong	Accon avm adviseurs en accountants	06-51889724	t.dejong@acconavm.nl	
6	Sake Kooistra	Alfa Accountants en Adviseurs	06-53592583	srkooistra@alfa-accountants.nl	

7	Hein-Willem Leeraar	Hein-Willem Leeraar & Partners	06-53145442	mail@heinwillemeleeraar.nl	
8	Han Meurs	ING Bank	06-38927417	han.meurs@ing.nl	
9	Johan Oonk	GIBO Groep	06-53553320	jgmoonk@gibogroep.nl	
10	Drees Visser	Agrivastgoed	06-51249178	avisser@agrivastgoed.nl	
11	Wijnand Vos	Rabobank Vaart en Vechstreek	06-23472871	w.vos@vvs.rabobank.nl	
12	René de Vries	Dijksterhuis & Uil	06-51280351	rene.devries@du-groep.nl	
13	Gerard Willems	ZLTO Advies	06-21232616	gerard.willems@zlto.nl	

COMPANIES DUTCH PARTICIPANTS STUDY TRIP 2011



APPENDIXES