

The Iberian Pork Meat Industry in Jabugo (Huelva, Spain), 1997-2016

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The municipality of Jabugo is one of the most important in the transformation of the Iberian pork. In the last decades, the industry has undergone a transformation, with processes of concentration, relocation and positioning among the companies in the industry. As a result, large companies have been strengthened, and the Protected Designation of Origin "Jabugo" emerges as an opportunity for the sector.

The main objectives of the work are: to establish the changes that have taken place in the sector between 1997 and 2016 and determine the impact of the crisis in Jabugo.

The study of the characteristics of the Iberian pork meat industry in the town of Jabugo and the changes occurred is done through a quantitative methodology, based on questionnaires that show significant results. For the developmental analysis businesses in the sector have completed three questionnaires in 1997, 2002 and 2016. The information obtained from the questionnaire is supplemented with the information from interviews to technicians and farmers conducted with a structured script (following the structure of the questionnaire).

The theoretical corpus has been developed through the systematic search of scientific articles and monographs, highlighting the lack of studies found in the sector and in the territorial scope of the addressed.

Data obtained have been complemented and contrasted with the databases from which information is obtained. These sources are complemented with regular publications from them and from other private companies as well as the Ministry of Agriculture.



The Iberian pork transformation meat industry is the most important economic activity in the municipality of Jabugo. Over the past twenty years (1997-2016), there have been changes in the Jabugo meat industry sector. The number of companies has increased, but especially the dryers, many of them dependent on foreign companies, resulting in the decline in industrial activity (sausage factories), as their interest is focused on the noble parts (pork hams, shoulders and loins) of Iberian pork. The bonanza of the Iberian sector led to the growth of the industry at the beginning of 2000, but the crisis affected the sector, with the closure and acquisition of these companies by other companies outside the territory and the sector.

The legal form of companies has evolved from limited companies to corporations, gradually weakening the local business network, due to the sale of facilities and the attractiveness of the municipality to foreign companies (many of them outside the Iberian pork sector), which look for their to positioning in the market with their deployment in Jabugo. The model of endogenous local development comes to an end, with an alienation of the territorial capital.

The various crises in the sector have been giving rise to new companies, so that, regardless of the construction of the facilities, most of them are recent, having passed through various owners until arriving to the current structure. There was a change from traditional family-owned companies to modern corporations and multinationals who have acquired facilities in the municipality (in an incremental process from 1983, in which the first large corporation was established in the sector).

Gradually, the production has been polarizing, with the disappearance of small industries in favor of medium and large enterprises. The business size has been one of the key factors for the survival of the activity, small industries have disappeared (suspension of payments, embargoes, cessation of activity due to the lack of generational change...), medium size businesses have been taken over, and large companies strengthen their position in the sector through takeovers.

After various upheavals, the new Protected Designation of Origin "Jabugo" brings together the most part of the sector, and opens up new opportunities to the highest quality products of the Iberian pork for the Municipality and the Region, such as gourmet products. At the same time, the world of the Iberian pork is an appealing tourist attraction to place value on through the "Club de Producto Ruta del Jamón Ibérico".

This study shows that in the last few years, the sector has undergone profound transformations and that, in good part, the basis of these transformations was already present before the beginning of the last crisis, in a sector that is unable to adapt and take advantage of the synergies to improve the productive structure.

