FRUIT LOGISTICA

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EUROPEAN STATISTICS HANDBOOK

A collection of key production, import and export information, market trends and patterns of trade for Europe's fresh fruit and vegetable business.

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EUROPEAN STATISTICS HANDBOOK

Contents

Certainly not a Normal Year!

The all-defining theme in 2020 was the global coronavirus crisis, which had a significant impact on the marketing of fresh fruit and vegetables. That impact was mainly felt in two ways: a limited availability of workers; and a sharp decrease in out-of-home consumption, due to the closure of restaurants and catering outlets.

In most European countries, fruit and vegetables destined for the fresh market are harvested by seasonal, foreign workers. With travel greatly restricted, there was a notable lack of pickers, especially in the first weeks of the pandemic.

The shift from eating out to eating at home resulted in record retail sales. Discounters, however, only saw above-average growth at the very beginning of the pandemic. Later on, it was the supermarkets that achieved better results. Online grocery sales grew the most, but primarily in categories other than fresh fruit and vegetables. Traditional points of sale, such as weekly markets, specialised shops, or direct purchases from the producer, held their ground remarkably well.

When the pandemic began, analysts predicted an abrupt change in consumer trends. But, by the turn of the year, the most important trends arguably remained the same, namely sustainability, health eating, and organic produce.

Despite the huge challenges seen in the past year, the fruit and vegetable sector in Europe has managed to supply its population with fresh fruit and vegetables, without major disruption.

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In cooperation with:
FRUITNET

Population
514.7 m

Area
4,381,300 km²

GDP per Inhabitant
32,020 EUR

GDP Growth
1.5 per cent

Unemployment
4.1 per cent

CPI for Food
(2015=100)
105.4

EUROPEAN UNION

The fruit and vegetable sector in Europe had three major issues in 2020: the weather, a looming unregulated Brexit, and the coronavirus pandemic. A hard Brexit was averted at the last minute, but it remains unclear what impact the current deal will have on trade with the UK. The agreement reached is certainly like a free trade agreement, as it allows tariff-free, cross-border fruit and vegetable sales to continue in the future. However, businesses face new border controls and additional administrative burdens. Delays at the borders cannot be ruled out, and the Covid-related congestion seen in December 2020 showed the effect these might have.

Individual EU countries would have been affected to varying degrees by an unregulated Brexit. After all, the UK was the third-largest importer of fruit and vegetables within the EU. In 2019, around 15 per cent of EU-27 vegetable exports went to the UK. For fruit, this share was just under 8 per cent. From the UK's perspective, around 33 per cent of all fruit imports came from elsewhere in the EU last year. For vegetables, that figure was around 85 per cent. So, as far as fresh produce is concerned, the consequences of a disorderly Brexit would have been felt more strongly by the UK than by countries remaining in the EU.

For both fresh fruit and fresh vegetables, the EU's trade balance is negative – more so for fruit than for vegetables, because very few bananas and other tropical fruits are produced in the EU. According to preliminary data, EU fruit imports (intra and extra) fell by 0.5 per cent last year. However, the main importers – Germany, the Netherlands and France – took in slightly larger quantities. Imports of fresh vegetables fell by about 5 per cent compared with the previous year's volume, with the main buyers importing smaller quantities. Exports also lagged behind those recorded in the previous year, by 5 per cent for fruit and by 2 per cent for vegetables. The biggest exporters for both fruit and vegetables are Spain and the Netherlands.

The share of extra-EU trade is comparatively high for fruit at 43 per cent. This is led by number-one fruit import bananas, almost 67 per cent of which come from countries outside the EU. In contrast, intra-EU trade predominates for oranges in second place. Other important fruits in terms of import volume are apples, easy-peel citrus and watermelons. Exports of fresh fruit remain largely within the EU. Only about 12 per cent of the total volume is exported to countries outside. In terms of export volumes, bananas, oranges and apples dominate.

For vegetables, the amount coming from outside the EU is much lower than for fruit, at 14 per cent. Tomatoes, onions and cucumbers are the vegetables imported in the largest quantities. The main imports from outside the EU are tomatoes from Morocco and onions from New Zealand. Around 89 per cent of vegetable exports, meanwhile, remain in the EU. The main items exported are tomatoes, onions and peppers.

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PRODUCTION

VOLUME ('000 tonnes)

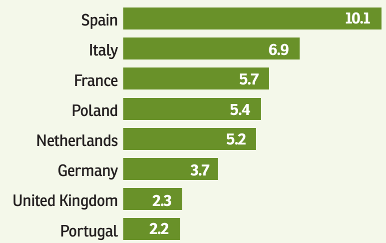
FRESH FRUIT	2017	2018	2019	2020p
Apples	9,251	13,275	10,783	10,711
Oranges	6,206	6,147	5,727	6,175
Easy peelers	2,929	2,776	2,893	3,073
Watermelons	3,204	3,183	3,026	2,924
Pears	2,237	2,358	1,959	2,199
Peaches	2,906	2,640	2,762	2,058
Table grapes	1,692	1,785	1,745	1,632
Melons	1,795	1,789	1,744	1,506
Nectarines	1,456	1,198	1,284	1,134
Other	11,545	12,954	12,987	12,482
TOTAL	43,221	48,105	44,911	43,894

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes [2]	17,399	16,730	16,582	16,351
Onions, dry	6,740	5,908	6,429	6,193
Carrots	5,779	5,278	5,489	5,189
Cabbage	3,743	3,380	3,423	3,370
Peppers	2,654	2,584	2,815	2,827
Cucumbers	2,298	2,347	2,441	2,581
Lettuce	2,365	2,246	2,508	2,028
Cauliflower	2,442	2,374	2,308	1,935
Courgettes	1,543	1,549	1,577	1,556
Other	15,625	15,371	15,699	15,142
TOTAL	60,587	57,767	59,271	57,172

1) Excluding potatoes. 2) Including tomatoes for processing. 3) Excluding products grown for processing.
Sources: AMI-informiert.de; Euronion; Europech; Eurostat; WAPA

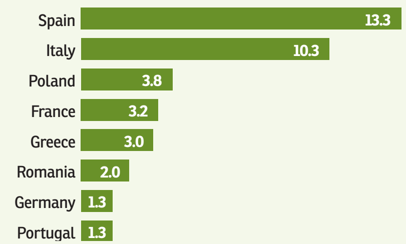
TOP 8 VEGETABLE PRODUCERS 2019 [3]

(million tonnes)



TOP 8 FRUIT PRODUCERS 2019

(million tonnes)



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Spain	13,308	14,244	13,258	13,200
Italy	10,281	10,527	10,314	10,491
Poland	3,573	5,868	3,771	4,300
Greece	3,368	3,408	2,992	3,075
France	3,091	3,013	3,232	2,900
Romania	1,630	2,436	2,030	2,042
Portugal	1,270	1,184	1,317	1,325
Germany	847	1,561	1,330	1,278
Hungary	933	1,130	946	952
Netherlands	659	760	752	713
Belgium	454	658	640	586
United Kingdom	421	446	433	439
Bulgaria	375	368	373	375
Austria	275	578	332	282
Croatia	135	208	179	180
Czechia	126	189	130	130
Cyprus	128	118	105	105
Slovenia	26	106	70	70
Sweden	41	49	41	50
Slovakia	43	55	47	47
Lithuania	86	94	42	42
Denmark	40	52	42	41
Ireland	28	26	26	26
Other EU	47	61	60	60
TOTAL	41,185	47,139	42,462	42,709

FRESH VEGETABLES [3]	2017	2018	2019	2020p
Spain	9,752	9,868	10,110	9,922
Italy	6,595	6,753	6,897	6,886
France	5,790	5,979	5,690	5,610
Poland	6,062	5,617	5,397	5,300
Netherlands	5,486	4,545	5,193	5,230
Germany	3,770	3,255	3,707	3,558
United Kingdom	2,569	2,204	2,312	2,337
Portugal	2,507	2,025	2,240	2,257
Belgium	1,777	1,620	1,776	1,900
Romania	1,933	2,047	1,878	1,893
Greece	1,729	1,660	1,445	1,517
Hungary	1,483	1,352	1,281	1,291
Austria	597	562	610	616
Bulgaria	419	454	431	434
Sweden	343	308	346	358
Denmark	331	307	300	312
Finland	269	267	294	287
Lithuania	190	208	230	232
Czechia	242	199	226	228
Ireland	207	204	219	221
Croatia	156	153	141	142
Slovakia	92	103	122	123
Slovenia	96	100	119	120
Other EU	209	199	222	224
TOTAL	52,602	49,988	51,185	50,998

Continued from page 3

EUROPEAN UNION

The Covid-19 pandemic has affected fruit and vegetable markets in Europe in several ways. Personal fears, travel restrictions, and quarantine requirements when entering certain countries have all contributed to a lack of labour for harvesting and processing, especially during the initial lockdown and especially in countries that rely on foreign harvesters. There were delays in harvesting as a result and, in some cases, products could not be picked at all. Producers faced higher costs when meeting stricter accommodation and employment requirements. When cases of Covid-19 occurred, entire work groups had to be quarantined. In the processing rooms and packing stations, it was sometimes only possible to work with a reduced number of people. All of this led to a temporarily limited supply.

Another issue was transport. Due to travel restrictions, there were delays in the movement of goods. Especially at the beginning, trucks in the EU were stuck at internal checkpoints that were no longer supposed to be borders. In overseas trade by ship, containers were missing because they were stuck in China. And consumer behaviour also changed during the pandemic, partly because restaurants and canteens had to shut. Schools and childcare were also closed at times, leaving parents to look after children at home. Where possible, workers switched to home working. All of this led to consumers preparing more meals at home and buying more fresh fruit and vegetables in return. The effect was stronger and more sustained for vegetables than for fruit.

There were other aspects of consumer behaviour that changed. For example, sales of citrus and ginger benefited as consumers hoped to strengthen their immune systems. This was part of an overall increase in attention paid to healthier eating. Especially in the first phase of the outbreak, consumers showed a strong preference for national or even regional production. In Germany and the UK, for example, members of the general public came forward to help with harvesting. Pick-your-own and buying directly from producers, in specialist shops or at weekly markets, has increased. Studies in other countries have also shown that consumers paid more attention to the origin of fruit and vegetables. Whether these effects will last remains to be seen. Initially, stronger demand from private households reduced the impact of closures elsewhere in the market, for example restaurants. Depending on the product, however, it later became apparent that private consumption could not absorb everything. For example, cucumbers, courgettes and iceberg lettuce were under price pressure at the start of the Spanish season in autumn 2020 because the supply was simply too large. At the same time, some producers had already been reduced their output to match the lower demand.

Continued on page 6

IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	3,270	3,129	3,171	3,189
Oranges	2,189	2,109	2,169	2,219
Apples	2,225	1,904	1,856	1,913
Easy peelers	1,580	1,519	1,546	1,538
Watermelons	1,298	1,409	1,448	1,456
Table grapes	992	950	955	991
Lemons	875	813	917	964
Pears	879	810	784	782
Avocados	356	417	450	508
Other	5,869	5,510	5,682	5,287
TOTAL	19,534	18,569	18,979	18,847

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes	2,474	2,492	2,486	2,373
Onions	1,237	1,338	1,407	1,418
Cucumbers	1,267	1,259	1,304	1,319
Peppers	1,205	1,240	1,249	1,309
Lettuce	1,313	1,334	1,347	1,207
Carrots	1,059	1,082	1,102	1,088
Cauliflower	562	542	540	542
Courgettes	391	407	435	463
Mushrooms	407	409	429	413
Other	3,048	3,081	3,097	3,208
TOTAL	12,964	13,183	13,395	13,339

EXPORTS – INTRA EU

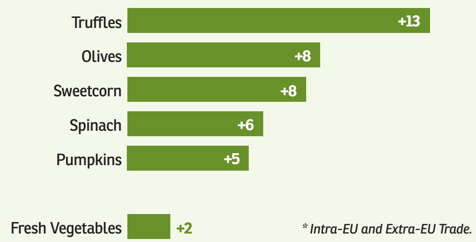
VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	3,243	3,134	3,161	2,958
Oranges	2,368	2,346	2,439	2,533
Apples	2,206	1,915	1,951	2,002
Easy peelers	1,668	1,663	1,706	1,683
Other	10,266	10,017	10,410	10,074
TOTAL	19,750	19,075	19,668	19,250

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes	2,637	2,616	2,595	2,494
Onions	1,324	1,492	1,620	1,479
Peppers	1,244	1,294	1,381	1,382
Lettuce	1,378	1,415	1,398	1,348
Other	6,705	6,889	7,126	6,949
TOTAL	13,287	13,705	14,121	13,652

TOP 5 FRESH VEGETABLE IMPORTS*

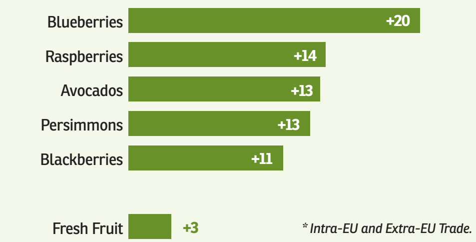
VOLUME GROWTH (% p.a. 2010-2019)



* Intra-EU and Extra-EU Trade.

TOP 5 FRESH FRUIT IMPORTS*

VOLUME GROWTH (% p.a. 2010-2019)



* Intra-EU and Extra-EU Trade.

IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	5,910	6,056	5,996	6,265
Oranges	1,050	1,084	965	1,124
Pineapples	942	1,016	1,000	912
Table grapes	664	683	694	675
Avocados	486	607	607	657
Easy peelers	455	495	476	573
Watermelons	336	399	428	495
Apples	422	550	441	463
Lemons	353	471	359	447
Other	2,368	2,523	2,491	2,597
TOTAL	12,987	13,883	13,457	14,209

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes	570	629	647	677
Onions	242	287	637	340
Peppers	186	214	202	217
Cucumbers	65	72	71	91
Courgettes	55	63	63	81
Carrots	43	88	87	68
Mushrooms	19	17	21	19
Cauliflower	7	7	8	10
Lettuce	14	11	11	8
Other	596	641	642	641
TOTAL	1,797	2,029	2,390	2,151

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Apples	1,283	844	1,273	894
Oranges	299	318	361	289
Easy peelers	211	228	208	195
Bananas	9	11	10	12
Other	1,447	1,264	1,392	1,287
TOTAL	3,248	2,665	3,244	2,676

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Onions	950	767	758	905
Tomatoes	131	117	118	127
Peppers	113	109	108	99
Lettuce	86	91	90	83
Other	578	492	466	453
TOTAL	1,857	1,576	1,542	1,667

1) Excluding potatoes.
Sources: AMI-informiert.de; Eurostat

Continued from page 5

EUROPEAN UNION

Overall, production of both fruit and vegetables in the EU was around 2 per cent lower in 2020 than the year before. The European apple harvest was only slightly lower than in the previous year. While more apples were harvested in Poland than in 2019, the crop volume in other important producing countries remained somewhat smaller than in the previous year. Regionally, frosts in the spring had again led to failures. Although the pear harvest was higher than in the previous year, it could not match the high volumes of 2017 and 2018. Italy was not yet able to match the results of previous years. The first estimates for the EU citrus harvest were consistently positive and larger volumes than in the previous year were expected. Persistent rains, wind and hail caused damage in both Spain and Italy, which dampened expectations. Nevertheless, the harvest of oranges and easy-peelers in 2020/21 will be higher. In contrast, stonefruit blossom was hit by frost or at least unfavourable weather conditions in almost all countries. This meant the peach, nectarine and apricot harvests were smaller than in the previous year. Although the dry and hot summers of recent years have led to strong demand for melons, production of watermelons and sweet melons was slightly down across Europe in 2020. The smaller areas are reflected in lower harvested volumes.

Last year's vegetable harvest was almost 4 per cent smaller than in 2019. The volume of tomatoes for processing could not fully meet demand in either Spain or Italy, with the total tomato harvest smaller than in the previous year. The European onion harvest was also smaller than in 2019, with smaller quantities harvested almost exclusively in Spain. Another dry and hot summer left its mark on outdoor vegetables. Only some late crops of carrots and head cabbage were able to benefit from late rainfall to boost tonnage. Overall, however, almost all outdoor vegetables were harvested in smaller quantities. In contrast, greenhouse cultivation benefited from high levels of sunshine. Cucumbers and peppers were harvested in larger quantities than in the previous year.

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Germany	5,610	5,391	5,456	5,520
Netherlands	4,562	5,034	5,154	5,301
France	3,443	3,450	3,433	3,405
United Kingdom	3,736	3,580	3,583	3,012
Belgium	2,536	2,409	2,170	2,207
Italy	2,048	2,004	2,061	2,084
Spain	1,684	1,833	1,752	1,823
Poland	1,693	1,579	1,616	1,654
Portugal	836	869	841	899
Romania	801	780	804	805
Czechia	701	666	662	668
Other	4,871	4,856	4,904	4,893
TOTAL	32,521	32,452	32,435	32,273

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Spain	7,518	7,156	7,929	7,418
Netherlands	3,789	4,088	4,208	4,320
Italy	2,971	2,585	2,669	2,552
Belgium	2,229	1,991	2,049	1,748
Greece	1,191	1,233	1,268	1,348
France	1,236	1,035	957	990
Poland	1,285	1,087	1,283	967
Germany	699	603	609	619
Portugal	466	502	509	548
Austria	178	176	217	218
Lithuania	390	266	194	169
Other	1,046	1,019	1,020	897
TOTAL	22,999	21,741	22,912	21,794

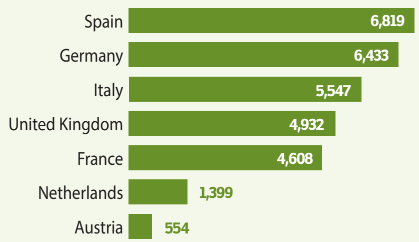
TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	33,498	34,210	34,683	36,795
Export	23,483	23,237	23,926	25,042
TRADE BALANCE	-10,015	-10,973	-10,756	-11,753

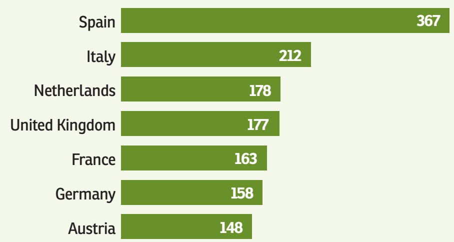
HOUSEHOLD DEMAND [1]

PURCHASED VOLUME, FRESH FRUIT AND VEGETABLES ('000 TONNES)



HOUSEHOLD DEMAND [1]

PURCHASED VOLUME, FRESH FRUIT AND VEGETABLES (KG/HOUSEHOLD)



IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Germany	3,271	3,299	3,366	3,354
France	1,871	1,939	1,907	1,871
United Kingdom	1,887	1,904	2,044	1,761
Netherlands	1,311	1,401	1,496	1,361
Belgium	1,201	1,096	1,119	1,135
Poland	560	614	827	745
Spain	537	648	663	647
Italy	646	651	733	643
Czechia	527	513	480	480
Romania	297	374	363	355
Sweden	348	347	357	349
Other	2,307	2,426	2,429	2,347
TOTAL	14,762	15,212	15,785	15,048

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Spain	4,860	5,102	5,388	5,264
Netherlands	4,919	4,926	5,027	4,938
France	1,053	997	1,023	1,003
Belgium	951	832	977	947
Italy	827	866	844	845
Poland	735	766	699	685
Germany	429	464	458	389
Portugal	262	251	262	239
Austria	147	162	148	164
Greece	123	140	135	134
United Kingdom	119	126	129	80
Other	720	649	574	599
TOTAL	15,145	15,280	15,663	15,286

TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Import	17,321	17,097	18,315	18,207
Export	15,969	15,969	17,150	17,056
TRADE BALANCE	-1.352	-1.128	-1.165	-1.150

1) Excluding potatoes.

***Sources:** AMI-informiert.de; CSO; Ctifl; FPJ; GfK; Eurostat; Kantar; MAPA ; UN Comtrade*

Population
11.5 m

Area
30,500 km²

GDP per Inhabitant
41,450 EUR

GDP Growth
1.7 per cent

Unemployment
3.2 per cent

CPI for Food
(2015=100)
107.8

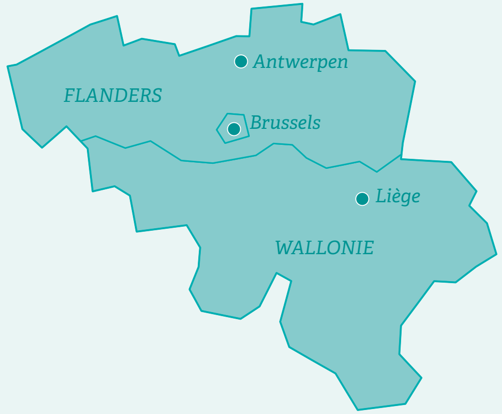
BELGIUM

Belgium is one of the smaller countries in Europe. Nevertheless, it plays a large role as a producer of fruit and vegetables. Belgium is also an important hub for fruit arriving by ship from overseas to be distributed across Europe. While the foreign trade balance for vegetables is almost even, in terms of value, significantly more fruit is imported than exported. Fruit imports in 2020 were unable to match the high level of the two previous years, with the group of other fruit types contributing to the decline. The most important origins are Colombia, the Netherlands and Costa Rica, which together account for around 45 per cent of total fruit imports. A disorderly Brexit would have had hardly any impact on Belgium in terms of fruit imports. Just under 0.2 per cent of total imports came from the UK. The situation is somewhat different for fruit exports. Here, around 4 per cent of the total volume went to the UK in 2019. The most important customers were Germany, the Netherlands and France.

In contrast to fruit imports, vegetable imports were higher in 2020 than in the previous year. Carrots, onions, peas and beans were imported in larger quantities. Peas and beans are mainly destined for the frozen food industry, which is very important in Belgium. By far the most important origin is the Netherlands, ahead of France. The UK recently accounted for only about 0.4 per cent of total vegetable imports. The UK has a share of almost 4 per cent of total vegetable exports. The most important customer is France, ahead of the Netherlands. Exports are mainly tomatoes and carrots.

Like other countries in Europe, production of fruit and vegetables in 2020 was affected by both the weather and the Covid-19 pandemic. Glasshouse cultivation benefited from strong insulation during the summer months. In open-field cultivation, yields were again slightly below average due to the summer drought. Overall, about 7 per cent more vegetables were harvested in 2020 than in the previous year. The harvest volumes were higher for tomatoes and carrots. The fruit harvest, on the other hand, was about 8 per cent lower than in the previous year. The apple harvest was smaller after two high-yield years. The pear harvest, on the other hand, recovered from the previous year's decline.

For a long time, Belgium had the highest number of Covid-19 cases in Europe. Public life was restricted late, but in a massive way. The closure of restaurants and increased working from home have had an impact on consumer behaviour. Consumers have bought more food for consumption at home. The aspects of regionality and health have become more prominent in purchasing. A study by the University of Antwerp shows that during the Covid-19 pandemic, consumers bought fewer convenience foods and more fruit and vegetables.



PRODUCTION

VOLUME ('000 tonnes)

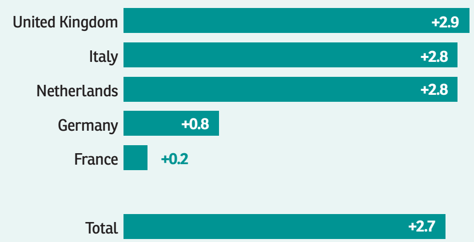
FRESH FRUIT	2017	2018	2019	2020p
Pears	310	369	332	362
Apples	88	231	242	167
Strawberries	48	48	48	45
Other	9	10	18	13
TOTAL	454	658	640	586

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes	256	259	270	288
Leeks	114	95	109	109
Carrots	93	78	78	98
Lettuce	41	35	34	37
Chicory	37	35	35	33
Cucumbers	26	24	27	30
Peppers	28	26	27	28
Celery	15	13	17	15
Courgettes	15	15	14	13
Other [2]	1,154	1,040	1,165	1,250
TOTAL	1,777	1,620	1,776	1,900

1) Excluding potatoes, open field and under glass.
2) Including products cultivated for processing.

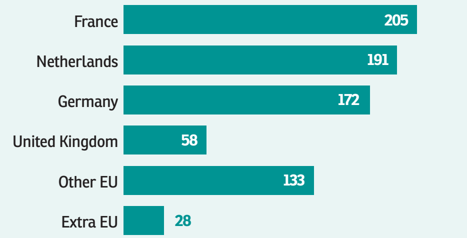
TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2010-2019)



FRESH VEGETABLE EXPORTS 2019

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VLAM

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Exotics	1,811	1,768	1,578	1,599
Citrus	254	220	206	210
Apples	153	147	113	108
Pears	55	57	50	43
Other	142	347	466	228
TOTAL	2,414	2,539	2,414	2,188

FRESH VEGETABLES	2017	2018	2019	2020p
Carrots/Turnips	266	254	265	286
Onions/Shallots	139	114	125	134
Peas	123	94	107	117
Green beans	98	94	88	95
Cucumbers	90	71	70	69
Tomatoes	88	66	82	62
Peppers	53	48	49	54
Other	339	331	321	325
TOTAL	1,196	1,072	1,106	1,139

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Exotics	1,587	1,477	1,181	1,151
Pears	310	290	315	292
Apples	193	113	195	171
Strawberries	48	45	45	41
Other	93	68	79	83
TOTAL	2,230	1,993	1,815	1,738

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	219	224	250	259
Carrots/Turnips	191	175	228	231
Leeks	67	67	71	69
Onions/Shallots	60	39	42	50
Cucumbers	65	52	51	45
Peppers	44	35	32	34
Celery	29	28	25	23
Chicory	19	17	21	16
Other	254	192	248	225
TOTAL	948	830	968	951

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	2,721	2,605	2,304	2,472
Export	2,150	1,884	1,723	1,741
TRADE BALANCE	-571	-722	-581	-731

FRESH VEGETABLES	2017	2018	2019	2020p
Import	897	790	827	845
Export	830	713	787	777
TRADE BALANCE	-67	-77	-40	-68

Population 67.1 m

Area 633,200 km²

GDP per Inhabitant 35,960 EUR

GDP Growth 1.5 per cent

Unemployment 5.2 per cent

CPI for Food (2015=100) 105.0

FRANCE

For yet another year, weather conditions were sub-optimal for French fruit and vegetable producers.

Spring frosts and rain reduced the stonefruit harvest. Meanwhile, it was an 'off-year' for apples in 2020. This was reflected in the total crop volume, which was estimated at around 2.9 million tonnes – the lowest yield in the last few years.

As for vegetables, the high summer temperatures followed by heavy rainfall in September reduced the crop to 5.6 million tonnes – below average for another year.

The processing industry in particular felt the impact of this shortfall. Freezing and canning vegetables is big business in France, and with the start of the coronavirus pandemic, demand for processed vegetables increased. In the first nine months of 2020, demand for frozen vegetables rose 8.5 per cent over last year, while canned vegetable sales increased by 8 per cent.

This positive consumption trend coupled with the poor harvests has fuelled a drive to increase vegetable production and acreage in France, for both the fresh and processing sectors.

France has been reducing its export business for years. In line with this continuing trend and the small harvests, exports declined in 2020. The trade balance for both fruit and vegetables is also negative, as in previous years.

With its Channel Tunnel link to the UK and its seaports in the north, France is considered a transit country for many goods exported from continental Europe to the UK. Five million lorries cross the Channel in both directions every year, and food is a major commodity.

The UK imports around 70 per cent of its fresh food. Due to Brexit and the increased customs checks, France has not only increased its border staff, but also invested in data processing. France itself exported around 170,000 tonnes of fruit and vegetables to the UK in 2019, mainly cauliflower, tomatoes, carrots and apples.

Meanwhile, back home in France, the coronavirus pandemic has changed purchasing behaviour. At the beginning of the pandemic, there was initially panic buying and stockpiling of long-life groceries. During this period, purchases of all foods increased by 15 per cent, while purchases of frozen vegetables increased by 31 per cent and purchases of canned vegetables increased by 28 per cent. Subsequently, during the spring, purchases of fruit and vegetables and regional and organic foods increased. In the first half of the year 2020, vegetable purchases increased more strongly in terms of volume (+9 per cent) than fruit purchases (+4 per cent), as figures from Kantar show. Due to the higher average prices, the expenditure per household increased stronger (vegetables: +18 per cent, fruit: +15 per cent).

Typically, French people prefer to buy fresh fruit and vegetables at farmer's markets, but during the first lockdown in spring this was not possible due to their closing. As a result, food retailing benefited, as did e-commerce and e-drive (order online, pick up yourself). It was also observed that more older households (60-80 years) resorted to online retailing in spring. Regionally, fruit and vegetable producers adapted to the situation and offered similar online sales and delivery service.

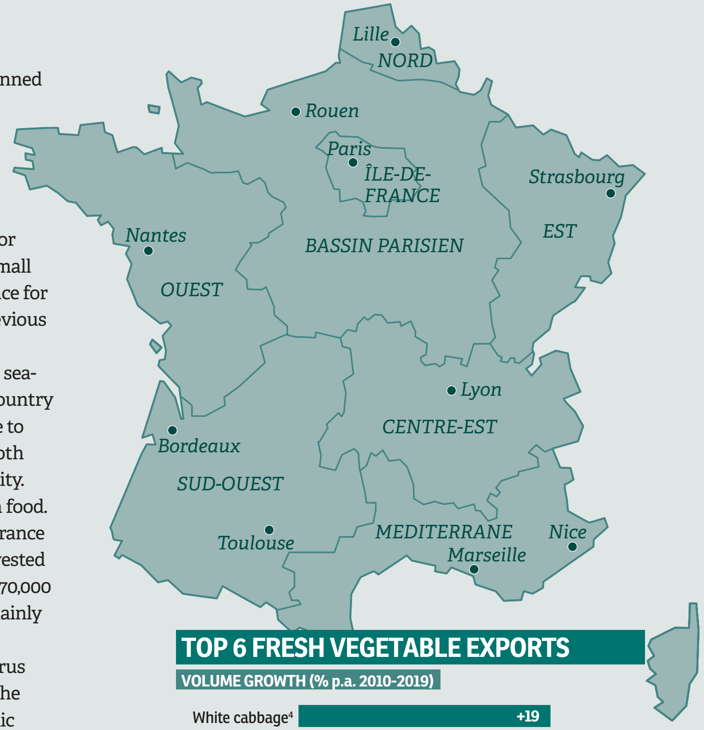
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2017	2018	2019	2020p
Apples	1,424	1,477	1,651	1,431
Melons	286	255	248	225
Plums [2]	211	175	205	190
Bananas	184	191	207	190
Pears	133	134	121	124
Peaches	116	97	106	97
Apricots	157	111	132	94
Nectarines	100	82	91	86
Strawberries	57	54	60	58
Kiwifruit	57	54	56	52
Other	367	383	355	353
TOTAL	3,091	3,013	3,232	2,900

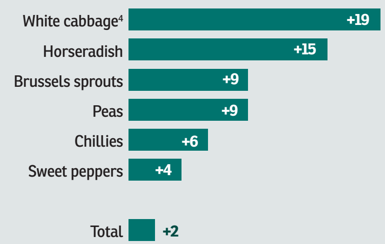
FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	772	712	709	642
Onions	459	509	548	556
Carrots	564	535	534	524
Sweetcorn	415	456	447	425
Green beans	397	394	338	376
Peas	250	251	282	260
Cauliflower	290	237	240	230
Lettuce	219	221	219	230
Chicory	153	434	140	154
Leeks	157	141	149	148
Other	2,115	2,088	2,084	2,066
TOTAL	5,791	5,978	5,690	5,611

1) Including overseas departments. 2) Including greengages and mirabelles. 3) Including broccoli. 4) Including red cabbage.



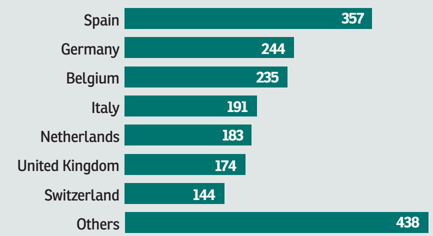
TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2010-2019)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2019)



Sources: *AMI-informiert.de; Agreste; Euronion; Eurostat; Businessfrance/Agrotech; Wapa*

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	690	750	671	690
Oranges	517	489	497	480
Clementines	355	334	343	320
Watermelons	188	202	227	240
Avocados	146	157	165	170
Melons	180	169	175	160
Lemons	151	139	140	150
Others	1,189	1,165	1,184	1,110
TOTAL	3,416	3,405	3,402	3,320

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	507	524	517	500
Carrots	155	157	154	175
Sweet peppers	149	156	152	160
Courgettes	138	144	152	150
Onions	136	140	141	125
Cucumbers	77	75	71	70
Others	708	742	720	690
TOTAL	1,869	1,938	1,907	1,870

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Apples	524	419	373	380
Bananas	251	250	205	150
Watermelons	27	34	41	50
Oranges	46	41	39	40
Melons	43	39	37	35
Others	332	239	248	215
TOTAL	1,224	1,022	943	870

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	231	224	235	250
Beans	111	124	108	130
Onions	80	91	99	120
Cauliflower [3]	146	105	121	100
Carrots	87	71	79	75
Peas	72	69	69	55
Other	324	293	312	300
TOTAL	1,050	977	1,023	1,030

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	3,732	3,681	3,722	4,100
Export	1,348	1,165	1,081	1,200
TRADE BALANCE	-2,384	-2,516	-2,641	-2,900

FRESH VEGETABLES	2017	2018	2019	2020p
Import	2,188	2,295	2,187	2,280
Export	1,070	956	1,062	1,090
TRADE BALANCE	-1,118	-1,339	-1,125	-1,190

Population	83.2 m
Area	357,300 km²
GDP per Inhabitant	41,510 EUR
GDP Growth	0.6 per cent
Unemployment	2.2 per cent
CPI for Food (2015=100)	105.5

GERMANY

Germany is the largest importer of fresh fruit and vegetables in Europe. At times in 2020, due to the Covid-19 pandemic, there have been transport restrictions and a lack of cargo capacity. Nevertheless, overall import volumes remained about the same, or a little lower than in the previous year. According to preliminary data, slightly fewer vegetables were imported, mainly due to lower demand for onions and carrots. For both, domestic supply was significantly higher in the first half of the year than in the same period of 2019. The most important sources of fresh vegetables are the Netherlands, Spain and Italy. Only about 0.3 per cent of vegetable imports come from the UK, led by turnips and Brussels sprouts.

The balance of trade in vegetables is clearly negative, even if Germany does sell them abroad. In 2020, its vegetable exports were about 16 per cent less than the year before. Its most important customers are the Netherlands, Austria and Sweden. Around 3 per cent of German vegetable exports go to the UK.

The import volume for fruit was slightly up on the previous year. Citrus fruits were in high demand during the first lockdown and imported in larger quantities. In contrast, stonefruit imports tended to be lower because production in key supply countries was down. Germany's most important sources are Spain and the Netherlands, with fruit from overseas also entering via the Netherlands.

Germany also exports fruit, with the largest share taken by re-exports of bananas. The main destinations are Denmark, Austria and Poland. Around 2 per cent of total fruit exports go to the UK.

In terms of fruit and vegetable production, Germany was affected by both the weather and the coronavirus outbreak in 2020. Especially at the beginning of the season in March/April, there was a lack of labour for harvesting, but also for planting and other work. As the season progressed, worker availability improved, but the cost of procurement and Covid-compliant accommodation was high. In the spring, frosts decimated the fruit harvest again, although the impact varied from region to region. The stonefruit harvest was below average.

Long-term effects of recent dry summers are now also evident here. The acreage of open-field vegetable production decreased in 2020. Planted area for asparagus was smaller due to low prices in previous years. The lack of labour has made this situation worse, affecting cultivation of other vegetables too. Heat and drought again led to smaller yields in summer. Vegetables harvested and stored later in the year, on the other hand, benefited from some late rainfall.

The Covid-19 pandemic led to shifts in demand. Restaurants and canteens were closed, shifting demand to private households. Consumers bought more fresh fruit and vegetables than in the previous year. In the case of fruit, the effect was particularly noticeable during the first lockdown. Vegetable purchases, on the other hand, remained above average in the months that followed.

PRODUCTION

VOLUME ('000 tonnes)

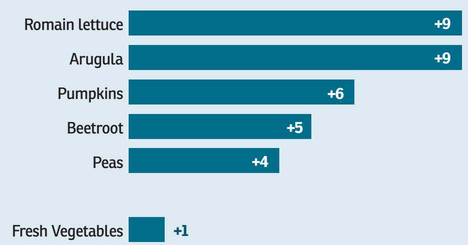
FRESH FRUIT [1]	2017	2018	2019	2020p
Apples	597	1,199	992	973
Strawberries	135	142	144	129
Pears	23	58	43	41
Plums	24	61	47	39
Sweet cherries	17	44	45	37
Sour cherries	8	16	16	13
Blueberries	14	13	15	12
Currants	13	16	11	9
Mirabelle plums	3	9	5	5
Other	14	4	14	20
TOTAL	**847**	**1,561**	**1,330**	**1,278**

FRESH VEGETABLES [2,3]	2017	2018	2019	2020p
Carrots	734	625	791	700
Onions	541	410	522	526
White cabbage	479	355	449	458
Gherkins	192	200	183	185
Iceberg lettuce	136	134	139	135
Red cabbage	146	104	125	127
Asparagus	131	133	131	106
Beetroot	91	81	96	90
Spring onions	92	94	85	90
Other	1,229	1,119	1,187	1,141
TOTAL	**3,770**	**3,255**	**3,707**	**3,558**

1) Including open field and protected production. 2) Excluding potatoes. 3) Only open field production.
Sources: AMI-informiert.de; Destatis; Eurostat

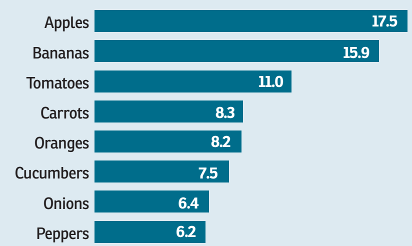
TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2010-2019



TOP 8 FRUIT AND VEGETABLES 2019

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	1,418	1,261	1,340	1,337
Apples	629	556	495	571
Oranges	462	473	464	522
Watermelons	412	510	473	513
Easy peelers	380	368	356	421
Table grapes	338	320	322	334
Lemons	173	172	189	231
Pears	170	167	157	157
Pineapples	148	163	149	133
Other	1,458	1,379	1,485	1,278
TOTAL	**5,589**	**5,368**	**5,431**	**5,496**

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	734	741	720	727
Cucumbers/Gherkins	483	496	531	548
Pepper	395	401	387	404
Lettuce	305	298	297	297
Carrots	240	252	275	247
Onions	227	240	277	235
Courgettes	89	97	98	105
Mushrooms	98	93	94	90
Cauliflower	80	77	74	74
Other	620	603	613	628
TOTAL	**3,271**	**3,299**	**3,366**	**3,353**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	343	247	283	312
Apples	90	60	64	62
Table grapes	33	31	26	26
Oranges	28	29	23	25
Other	199	228	204	195
TOTAL	**694**	**596**	**598**	**620**

FRESH VEGETABLES	2017	2018	2019	2020p
Onions	89	73	59	62
Carrots	29	64	56	44
Lettuce	43	46	49	44
White cabbage	43	47	58	44
Other	226	233	236	190
TOTAL	**429**	**464**	**458**	**384**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	6,045	6,218	6,121	6,717
Export	786	742	713	732
TRADE BALANCE	**-5,259**	**-5,476**	**-5,408**	**-5,985**

FRESH VEGETABLES	2017	2018	2019	2020p
Import	4,550	4,487	4,656	4,820
Export	374	392	423	372
TRADE BALANCE	**-4,176**	**-4,095**	**-4,233**	**-4,448**

Population
10.7 m

Area
132,000 km²

GDP per Inhabitant
17,100 EUR

GDP Growth
1.9 per cent

Unemployment
10.3 per cent

CPI for Food
(2015=100)
102.5

GREECE

Greece is a net exporter of fruit and vegetables. The trade balance for vegetables is only just positive. For fruit, exports are significantly higher than imports. In recent years, Greece has exported increasing amounts of fruit. In 2020, it was 6 per cent more than the year before. The citrus fruit harvest was larger than in the previous year. Accordingly, exports were also higher. Moreover, at the first peak of the Corona pandemic, demand for citrus fruits was high across Europe. In contrast, the smaller harvest of stonefruit is reflected in declining exports. The most important fruits for export are oranges, watermelons and kiwifruit. The most important target markets are Romania, Bulgaria and Germany. Exports to the UK account for just under 2 per cent of the total. So, a disorderly Brexit would not have had major consequences for Greece. Imports of fruit to Greece fell slightly in 2020. A good 68 per cent of fruit imports are bananas. Accordingly, Ecuador is by far the most important origin. Italy and Costa Rica follow behind. Only about 1 per cent of total fruit imports come from the UK.

In the case of vegetables, foreign trade does not play a major role. Only about 9 per cent of the vegetable harvest is exported. In 2020, exports were at the same level as the previous year. Somewhat smaller quantities of peppers were offset by larger exports of tomatoes. The most important customers are Bulgaria and Romania. The UK was the third most important buyer of vegetables from Greece in 2019, accounting for 5 per cent of the total export volume. Imports of vegetables to Greece fell by 28 per cent in 2020 compared to the previous year. Onions were imported in smaller quantities because the domestic harvest was significantly higher than the previous year. India, Poland and Egypt are the main origins of vegetables. The UK accounted for just under 1 per cent of Greek vegetable imports in 2019.

After a slump in 2019, the fruit harvest was 3 per cent higher again in 2020. However, the high volumes of 2017 and 2018 were not matched again. In the case of stonefruit, yields again remained below average due to weather conditions. Oranges and kiwifruit were harvested in larger quantities. Vegetable production was also higher again than in the previous year, with the increase almost exclusively accounted for by onions and the group of other vegetables. During the first lockdown, prices for fruit and vegetables rose sharply at the Greek wholesale markets. In some cases, it was not possible to harvest due to a lack of workers. There were also problems with the transport of goods from the production areas to the cities.

Due to the Corona pandemic, household demand for fresh fruit and vegetables has increased in Greece. Many consumers have been buying less meat and dairy products, but more fruit and vegetables, in order to strengthen their health. Due to the lockdown and the closure of restaurants, meals have shifted to the private sphere. This has also benefited processed fruit and vegetable products such as frozen and canned foods.

PRODUCTION

VOLUME ('000 tonnes)

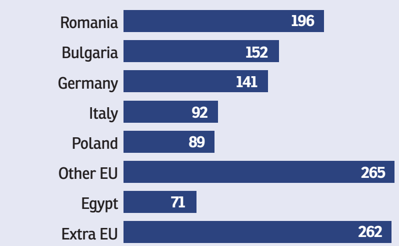
FRESH FRUIT	2017	2018	2019	2020p
Oranges	961	913	849	890
Watermelons	647	630	345	397
Kiwifruit	275	265	286	314
Apples	231	301	276	289
Table grapes	310	293	273	269
Peaches [1]	203	244	216	190
Easy peelers	177	174	151	149
Nectarines	97	116	119	114
Apricots	90	80	91	79
Other	377	391	386	385
TOTAL	3,368	3,408	2,992	3,075

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes [1]	540	532	463	458
Onions	207	145	134	200
Peppers	157	146	155	150
Cucumbers	119	133	129	130
Cabbage	80	86	70	68
Courgettes	77	76	66	67
Cauliflower/Broccoli	51	59	50	52
Green beans	60	58	43	45
Lettuce	64	58	47	45
Other	372	366	288	303
TOTAL	1,729	1,660	1,445	1,517

1) Excluding products grown for processing.
Sources: AMI-informiert.de; CSO; Europech; Eurostat; WAPA

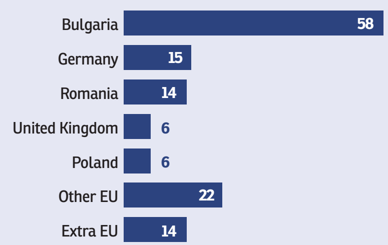
FRESH FRUIT EXPORTS 2019

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2019

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	182	216	216	208
Lemons	23	19	21	25
Apples	11	15	26	22
Pineapples	12	12	15	12
Other	46	41	34	39
TOTAL	274	303	312	305

FRESH VEGETABLES	2017	2018	2019	2020p
Onions	9	11	34	19
Tomatoes [1]	17	30	17	13
Mushrooms	12	11	12	12
Other	31	31	42	32
TOTAL	69	83	105	76

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Oranges	279	313	263	329
Watermelons	173	185	186	207
Kiwifruit	128	135	172	163
Peaches	115	95	102	90
Apples	76	71	89	75
Nectarines	70	66	61	62
Table grapes	90	67	63	61
Strawberries	27	29	45	55
Cherries	17	16	23	30
Apricots	24	24	23	22
Pears	5	5	5	6
Other	189	228	234	247
TOTAL	1,193	1,234	1,266	1,345

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	34	37	35	38
Cucumbers	34	40	37	37
Peppers	18	17	18	17
Other	37	47	45	43
TOTAL	123	141	135	134

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	205	213	222	222
Export	698	730	782	906
TRADE BALANCE	493	517	560	684

FRESH VEGETABLES	2017	2018	2019	2020p
Import	66	76	89	74
Export	104	105	95	106
TRADE BALANCE	38	29	6	32

Population *60.2 m*

Area *302,100 km²*

GDP per Inhabitant *29,660 EUR*

GDP Growth *0.3 per cent*

Unemployment *5.7 per cent*

CPI for Food *(2015=100) 103.2*

ITALY

As one of the largest fruit and vegetable suppliers in Europe, Italy can look back on an eventful year. It was not just the Covid-19 pandemic, with a lack of labour from eastern Europe and more difficult logistics, that put the country to the test. Climate change and its consequences, as well as the emergence of diseases and parasites, also troubled the country in 2020. In terms of production, Italy was able to reach the previous year's level for vegetables and even exceed it slightly for fruit. This was not only due to the increased citrus harvest. The pear crop was also larger again after a very small 2019 harvest. The stonefruit crop was historically small due to land clearing and frosts in spring 2020. The marketing of table grapes was disappointing, with weak demand due to warm weather in export markets. For kiwifruit, a disease has been spreading for years in various growing regions, weakening and even killing some plants. There was also frost damage in spring and storms at the beginning of October, which led to crop failures. For these reasons, kiwifruit output was low for the second year running. But yellow kiwifruit is gaining importance as planted area expands. However, 2020 was a strong year for fruit vegetables such as tomatoes, courgettes, peppers and aubergines. Carrots recorded a strong increase in volume, but this was due to expansion in cultivated area.

Italy ended the trading year on a positive note, with higher prices leading to a better result, especially for vegetables. For fruit, Italy's weaker domestic harvest in 2019 meant it had to rely more on imports, for example in citrus.

Italy was the country most affected by the pandemic in Europe during the spring of 2020. The harsh lock-down, with public life at a standstill for weeks and restaurants closed, led to stronger private demand for fresh fruit and vegetables, as in other countries in Europe. But the strong volume increase in April and May had no lasting effect. From May to October, volumes fell below the previous year's levels, with a greater deficit for fruit than for vegetables. If this development continued to the end of the year, the negative trend of declining fruit and vegetable sales will also have persisted in 2020. Since the start of the year, around 5 million tonnes of fruit and vegetables have been purchased for fresh consumption, 1 per cent less than the January-October 2019 total. Spending was up 5 per cent, however, due to average prices being 6 per cent higher than in 2019. Compared with other European countries, private consumption of fruit and vegetables was higher. In 2019, each Italian household purchased around 125kg of fresh fruit (-4 per cent) and 111kg of vegetables (-2 per cent). Average expenditure per household was €440. The pandemic has led to a change in consumer thinking, boosting demand for organic food, including organically produced fruit and vegetables.

At the start of January 2021, the UK officially left the EU, a highly significant moment for Italian fruit and vegetables. The UK is Italy's sixth-largest export market in terms of volume, taking 140,000 tonnes on average in each of the past five years. It is also the fourth-largest in terms of sales, with turnover worth more than €250 million per year generated primarily by exports of apples, table grapes and kiwifruit.

PRODUCTION

VOLUME ('000 tonnes)

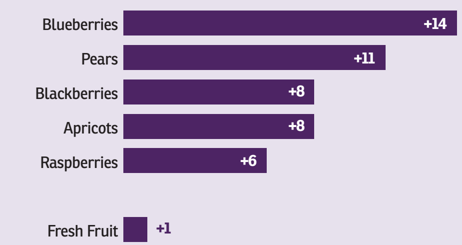
FRESH FRUIT	2017	2018	2019	2020p
Apples	1,704	2,264	2,096	2,080
Oranges	1,583	1,592	1,650	1,885
Melons	1,177	1,190	1,242	1,259
Table grapes	978	1,028	1,009	1,011
Easy peelers	747	578	764	824
Pears	738	730	363	642
Lemons	418	425	446	491
Peaches [2]	588	503	534	422
Kiwifruit	369	393	318	327
Others	1,980	1,823	1,892	1,550
TOTAL	10,281	10,527	10,314	10,491

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes [2]	941	986	1,049	1,068
Courgettes	536	560	569	584
Carrots	487	479	492	523
Fennel	515	525	524	502
Lettuce	473	488	487	464
Onions	411	372	478	442
Artichokes	388	390	379	367
Cauliflower/Broccoli	372	368	368	356
Aubergines	286	298	301	329
Sweet peppers	250	261	250	257
Others	1,937	2,026	2,001	1,993
TOTAL	6,595	6,753	6,897	6,886

1) Excluding potatoes. 2) Excluding products grown for processing.
Sources: AMI-informiert.de; CSO; Eurostat; ISTAT; Wapa

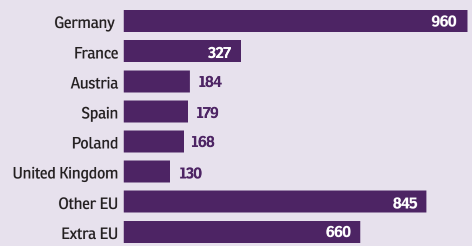
TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2010-2019)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2019)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	775	801	758	840
Oranges	232	177	184	250
Pineapples	164	176	160	130
Lemons	122	115	128	120
Others	744	725	776	840
TOTAL	2,037	1,994	2,006	2,180

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Tomatoes [2]	132	130	146	120
Lettuce	113	125	123	100
Sweet peppers	74	83	90	80
Others	326	313	373	310
TOTAL	646	651	732	610

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Apples	976	673	905	850
Table grapes	502	465	420	520
Watermelons	215	299	233	330
Kiwifruit	322	293	304	240
Oranges	111	138	104	125
Peaches/Nectarines	223	160	158	100
Pears	138	155	104	60
Lemons	47	47	48	50
Easy peelers	94	80	65	45
Others	350	280	298	250
TOTAL	2,977	2,590	2,639	2,570

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Lettuce	191	207	201	200
Carrots	76	83	76	100
Cauliflower/Broccoli	83	82	72	80
Kohlrabi/Kale	66	66	65	70
Tomatoes	67	79	60	60
Fennel	50	56	52	60
Beetroot	60	58	58	55
Onions	43	36	31	25
Courgettes	28	25	22	25
Others	161	173	177	170
TOTAL	827	865	814	845

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	1,780	1,746	1,749	2,000
Export	3,074	2,806	2,710	2,960
TRADE BALANCE	1,294	1,060	961	960

FRESH VEGETABLES	2017	2018	2019	2020p
Import	688	649	794	675
Export	1,250	1,269	1,309	1,420
TRADE BALANCE	562	620	515	745

Population
17.4 m

Area
41,500 km²

GDP per Inhabitant
46,710 EUR

GDP Growth
1.7 per cent

Unemployment
2.4 per cent

CPI for Food
(2015=100)
105.7

NETHERLANDS

Although the Netherlands is a very small country in Europe, it often leads the way in its role as a transshipment hub for European trade. Dutch ports are very important for the distribution of fruit and vegetables within Europe. Products shipped to the Netherlands are often re-exported, especially fruit. Products like bananas, oranges, avocados and pineapples are imported in large quantities mainly from Spain, but also from overseas, and then transported to other countries. Due to the high share of imported fruit, the trade balance for fruit is negative.

Onions and tomatoes are still the Netherland's main vegetable exports, followed by peppers and cucumbers. But the countries of destination are very different. While fruit vegetables like tomatoes are mainly shipped to Europe, onions are shipped to Africa, Asia and the Americas. The trade balance of vegetables is positive, because about 50 per cent of exported vegetables are produced in the country itself.

Dutch fruit and vegetable exports go mostly to third countries, with only one-third sent to other EU countries. Germany (65 per cent) is still the main destination for Dutch fruit and vegetables exports, with the UK (34 per cent) in second place. As no import duties are to be levied between the EU and the UK after Brexit, trade in goods will likely remain at a similar level. Senegal, a major destination for onions, remains in third place. While Poland moved into the top-six ranking in 2019, Côte d'Ivoire fell out of that group as its exports declined.

The Netherlands is one of the world's largest sources of onions, which are the country's most important vegetable crop in terms of cultivated, open-field production. According to preliminary data, production has risen slightly. In contrast, fewer carrots were harvested last year. The highest relative growth rates in vegetable production over the past ten years are found in some minor items like spinach or celery roots. Carrot and asparagus production also increased in the period 2010 to 2019.

Glasshouse vegetables also play a major role. Tomatoes lead the ranking, followed by cucumbers and peppers, whose harvest volumes may have been slightly higher recently. Mushroom production is stable.

Apples and pears dominate fruit production. Pear production was expected to be similar in 2020 to the previous harvest, while lower quantities were forecast for apples. Strawberry volume was also expected to be limited in open-field production.

The impact of Covid-19 seen so far was less than expected, at least for the period March to August 2020. There was a shortage of staff at the beginning of the pandemic. The drop in demand from the foodservice sector caused sales to fall, so prices for vegetables such as round tomatoes was down. Exports to markets outside the EU decreased, due to air traffic restrictions, while more fruit and vegetables were exported to other EU member states.

PRODUCTION

VOLUME ('000 tonnes)

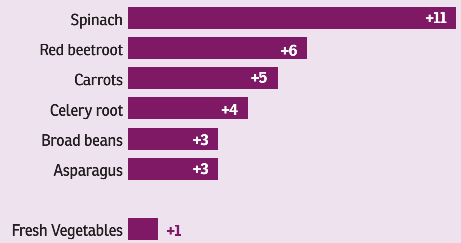
FRESH FRUIT	2017	2018	2019	2020p
Pears	330	402	373	373
Apples	227	269	272	234
Strawberries	66	65	76	72
Other berries	17	17	17	17
Other	18	9	14	17
TOTAL	659	760	752	713

FRESH VEGETABLES	2017	2018	2019	2020p
Onions	1,780	1,050	1,520	1,560
Tomatoes	910	910	910	900
Carrots	611	539	616	579
Cucumbers	400	410	410	415
Peppers	365	355	355	360
Mushrooms	300	300	300	300
White cabbage	138	98	115	130
Leeks	104	82	92	87
Celery	101	79	92	86
Iceberg lettuce	84	85	86	85
Spinach	60	67	74	73
Chicory	55	53	74	65
Aubergines	53	55	55	52
Brussels sprouts	53	51	54	51
Other	472	411	440	432
TOTAL	5,486	4,545	5,193	5,230

1) Including re-exports. 2) Excluding nuts.

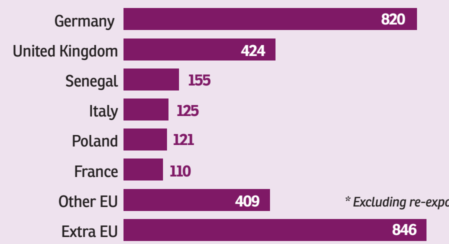
TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2010-2019)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION* ('000 tonnes, 2019)



** Excluding re-exports.*

Sources: AMI-informiert.de; CBS; Eurostat; KCB/GroentenFruitHuis

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT[2]	2017	2018	2019	2020p
Bananas	980	1,141	1,496	1,250
Oranges	585	589	595	626
Apples	253	305	245	525
Avocados	267	345	349	418
Table grapes	381	413	419	387
Pineapples	286	321	324	292
Other	1,810	1,920	1,726	1,791
TOTAL	4,562	5,034	5,154	5,289

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	221	230	230	213
Onions	219	248	337	211
Cucumbers	119	117	119	95
Peppers	92	96	94	91
Other	660	710	716	640
TOTAL	1,311	1,401	1,496	1,250

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT[2]	2017	2018	2019	2020p
Total[1]	3,789	4,088	4,208	3,968
Dutch origin only				
Pears	171	156	212	231
Apples	58	44	44	60
Strawberries	32	28	21	18
Other	4	3	4	4
TOTAL	265	231	281	313

FRESH VEGETABLES	2017	2018	2019	2020p
Total[1]	4,919	4,927	5,027	4,564
Dutch origin only				
Onions	1,139	1,059	967	1,230
Tomatoes	751	750	738	682
Cucumbers	276	252	317	289
Peppers	316	295	314	277
Cabbage	100	95	94	82
Carrots	76	70	62	47
Other	245	226	237	213
TOTAL	2,903	2,747	2,729	2,820

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT[2]	2017	2018	2019	2020p
Import	5,450	5,866	6,381	6,992
Export[1]	5,478	5,859	6,080	6,318
TRADE BALANCE	28	-7	-301	-674

FRESH VEGETABLES	2017	2018	2019	2020p
Import	1,663	1,575	1,699	1,573
Export[1]	5,283	5,382	5,733	5,100
TRADE BALANCE	3,617	3,803	4,034	3,527

Population
38.0 m

Area
312,700 km²

GDP per Inhabitant
13,870 EUR

GDP Growth
4.5 per cent

Unemployment
2.0 per cent

CPI for Food
(2015=100)
104.8

POLAND

Poland is one of the most important fruit and vegetable producers in Europe, although due to the climate, heat-loving and non-frost-resistant fruit species such as some stonefruit and citrus cannot be produced. In the end, Poland again looks back on a strong fruit harvest with about 4.3 million tonnes, while the vegetable harvest is weak for the second year in a row with 5.3 million tonnes. The water deficit in the soil affected the development of almost all outdoor vegetables at the beginning of the growing season. The lack of precipitation in April and May intensified the situation and some crops had to be sown again due to poor development. In the end, the head cabbage harvest surpassed the deficit of 2019 by 10 per cent. There were crop shortfalls in tomatoes: There were frosts in May, which made replanting necessary and also slowed down development.

Besides supplying the fresh market, a large part of the fruit produced is processed: Apples are made into juices or concentrate, while berries are frozen or processed into fruit preparations. The processing volume remained constant at 2.9 million tonnes in 2019.

The weak fruit and vegetable harvest in 2019 is reflected in the foreign trade data for 2020. Imports of fresh vegetables were above and vegetable exports below average for the second year in a row. For this reason, the foreign trade balance was negative for an additional year. In the fruit sector, the small apple harvest caused exports to decline in the first half of 2020. In contrast, exports of fresh strawberries and blueberries developed positively, as did re-exports of bananas. The balance for fruit is also negative.

The UK is the third most important buyer of Polish fruit and vegetables. The most important export products there are apples and blueberries and onions and mushrooms. With the UK's exit from the EU, the new regulations are more time-consuming.

At the beginning of Corona crisis, sales of fresh food including fruit and vegetables were very strong during spring. In the summer and early autumn, purchases stabilised at a normal level. Due to the economic crisis and the increasing price pressure at the retail level, consumers might buy premium products as well as organically and regionally produced products again in smaller quantities to the disadvantage of the respective producers.

Since the beginning of the pandemic, the costs for hygiene and equipment as well as transport and packaging have increased for producers. As throughout Europe, seasonal labour temporary was limited. the higher production costs were partly covered by stronger demand. A major problem is the closure of the horeca sector especially for the traders who supplying this channel.

PRODUCTION

VOLUME ('000 tonnes)

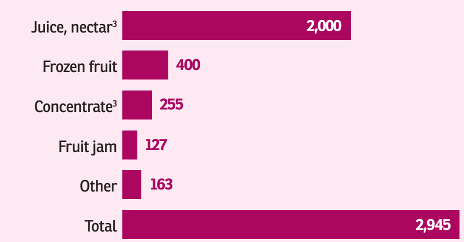
FRESH FRUIT [1]	2017	2018	2019	2020p
Apples	2,870	4,810	2,910	3,400
Strawberries	189	205	185	161
Sour cherries	72	201	152	150
Currants	129	165	126	130
Raspberries	104	116	76	122
Plums	58	121	95	90
Pears	40	70	70	65
Sweet cherries	20	60	44	42
Blueberries	16	25	35	41
Other	75	95	77	99
TOTAL	3,573	5,868	3,771	4,300

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Cabbage	1,011	913	837	900
Tomatoes	898	929	918	877
Carrots	827	726	678	700
Onions	667	563	535	580
Cucumbers	544	539	519	502
Mushrooms	325	330	340	330
Beetroot	336	298	281	300
Cauliflower	238	220	207	200
Other	1,215	1,099	1,081	910
TOTAL	6,062	5,617	5,397	5,300

1) Including fruits for processing. 2) Excluding potatoes. Open-field and under glass. 3) Including vegetable juice and nectar. 4) Including re-export.
Sources: AMI-informiert.de; Eurostat; GUS; IERiGZ; Wapa

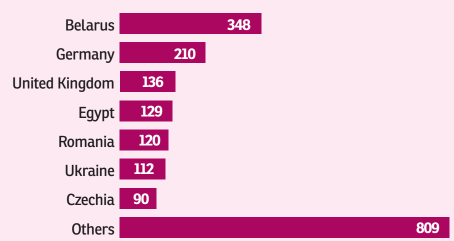
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2019)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2019)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	480	487	457	550
Watermelons	151	153	147	160
Oranges	166	153	169	145
Lemons	120	120	120	130
Easy peelers	163	147	162	115
Other	625	502	534	550
TOTAL	1,705	1,562	1,589	1,650

FRESH VEGETABLES	2017	2018	2019	2020p
Onions	43	58	203	170
Tomatoes	147	153	159	170
Peppers	62	68	72	70
Cucumbers	59	59	63	60
Other	235	241	320	300
TOTAL	546	579	817	770

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Apples	1,032	782	956	540
Pears	42	45	73	130
Bananas	61	78	66	80
Persimmons	16	10	13	25
Strawberries	9	6	6	15
Blueberries	10	12	13	15
Peaches	10	11	20	10
Other [4]	106	118	118	95
TOTAL	1,286	1,062	1,265	910

FRESH VEGETABLES	2017	2018	2019	2020p
Mushrooms	229	231	237	220
Onions	124	145	126	155
Tomatoes	92	88	73	75
Cabbage	52	38	28	30
Peppers	19	23	28	25
Kohlrabi/Kale	47	35	29	21
Carrots	33	22	22	20
Other	134	149	146	139
TOTAL	730	731	689	685

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	1,351	1,293	1,348	1,545
Export	604	581	417	630
TRADE BALANCE	-747	-712	-931	-915

FRESH VEGETABLES	2017	2018	2019	2020p
Import	596	597	752	780
Export	637	670	745	715
TRADE BALANCE	41	73	-7	-65

Population
21.7 m

Area
819,900 km²

GDP per Inhabitant
48,830 EUR

GDP Growth
1.7 per cent

Unemployment
4.3 per cent

CPI for Food
(2015=100)
104.3

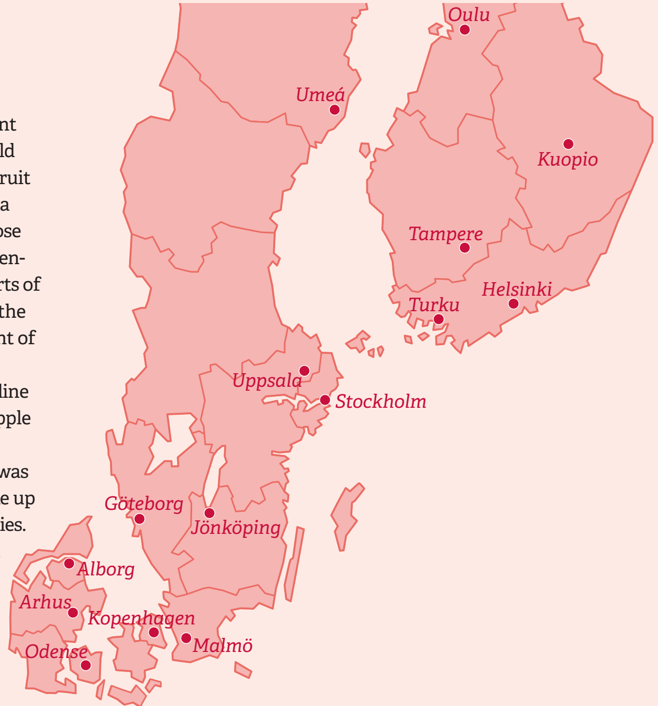
SCANDINAVIA

DENMARK, FINLAND, SWEDEN

The Nordic countries Denmark, Finland and Sweden are net importers of fresh fruit and vegetables. The climate limits the production possibilities both in time and in the selection of fruit and vegetables. In total, the three countries imported around 1.41 million tonnes of fresh fruit and 669,000 tonnes of fresh vegetables in 2020. Both fruit and vegetable imports were thus slightly lower than in the previous year. One reason for this is the increased domestic production. The most important origins of fresh vegetables are the Netherlands and Spain with a share of 38 and 29 per cent respectively. These are also the most important countries of origin for fruit. However, with lower shares of the total volume, as overseas origins also play a major role in exotic and tropical fruits. The UK recently accounted for only 0.6 per cent of total vegetable imports and 0.3 per cent of total fruit imports. The impact of the Brexit should therefore be manageable for the Nordic countries. Fruit and vegetables are also exported from the region to a limited extent. In 2020, exports remained behind those of the previous year. Only vegetable exports from Denmark show an increase, which is due to higher exports of carrots. When exports are made, they are mainly to the directly neighbouring countries. Just under 1 per cent of fruit and vegetable exports went to the UK.

Fruit production recovered in 2020 from the decline in the previous year. This is mainly due to a larger apple harvest in Sweden and a larger pear harvest in Denmark. However, the high harvest volume from 2018 was not reached again. Besides apples, strawberries make up a large part of fruit production in the Nordic countries. Most of this is protected cultivation in greenhouses. The vegetable harvest in 2020 was also higher than the year before. This mainly reflects larger quantities of onions. Vegetable production is dominated by carrots. Here, the harvest volume in Denmark increased, but did not yet reach the high level from 2017. As in many other European countries, there was a heatwave in June 2020, which made production difficult.

The Nordic countries have been affected to varying degrees by the Corona pandemic. In addition, different strategies have been used in dealing with the pandemic. Finland has come through the crisis best so far. There, public life was shut down early and extensively. In Denmark, measures were taken later, and Sweden initially dealt with the pandemic in a liberal manner. Impacts of the Corona pandemic were felt mainly in the packaging, transport and labour sectors. In addition, there was a lack of sales opportunities in the direction of gastronomy during the lockdown. In all three countries, however, private consumers bought more fresh food – including fruit and vegetables – than in the previous year. Above all, national or even regional products were in greater demand.



PRODUCTION

VOLUME ('000 tonnes)

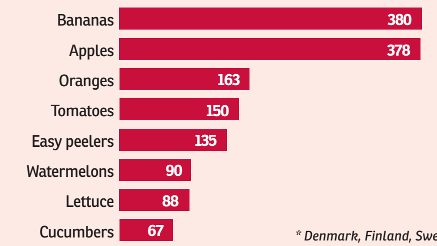
FRESH FRUIT	2017	2018	2019	2020p
Denmark	**40.2**	**51.7**	**41.7**	**41.5**
– Apples	20.5	32.6	25.2	24.0
– Strawberries [2]	6.7	6.5	6.3	6.1
– Pears	4.5	5.8	4.7	6.0
Finland	**22.3**	**25.6**	**29.7**	**30.0**
– Strawberries [2]	12.0	15.5	17.8	18.2
– Apples	6.8	7.2	8.1	8.0
Sweden	**41.2**	**49.2**	**41.4**	**50.1**
– Apples	18.0	32.0	20.0	32.0
– Strawberries [2]	15.7	15.6	16.3	16.5
TOTAL	**103.6**	**126.5**	**112.7**	**121.6**

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Denmark	**330.9**	**307.5**	**300.3**	**312.0**
– Carrots	115.8	102.6	105.0	108.0
– Onions	65.0	43.0	61.0	70.0
– White cabbage	27.6	26.4	24.0	23.5
Finland	**268.7**	**266.5**	**294.4**	**286.7**
– Carrots	62.5	66.7	77.3	75.0
– Tomatoes	39.4	39.3	40.5	37.8
Sweden	**342.8**	**308.3**	**346.3**	**358.1**
– Carrots	109.1	92.5	106.7	103.5
– Onions	53.0	45.0	50.0	65.0
TOTAL	**942.4**	**882.2**	**941.0**	**956.8**

1) Excluding potatoes. 2) Including greenhouse production.
Sources: AMI-informiert.de; Eurostat; national statistics

FRUIT AND VEGETABLE IMPORTS 2019

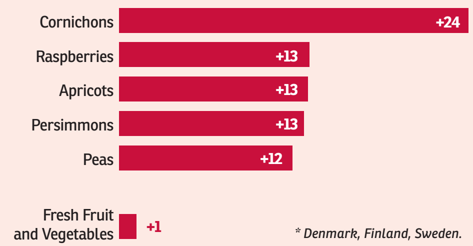
BY NORDIC COUNTRIES* ('000 tonnes)



** Denmark, Finland, Sweden.*

TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH* (% p.a. 2010-2019)



** Denmark, Finland, Sweden.*

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Denmark	**376.2**	**432.5**	**418.9**	**403.4**
– Bananas	82.7	96.3	87.9	83.0
– Apples	48.7	53.1	50.8	53.4
– Oranges	37.8	57.9	54.8	49.2
Finland	**330.6**	**330.5**	**332.6**	**329.9**
– Bananas	114.0	111.8	110.3	111.4
– Apples	43.8	40.7	42.1	42.4
Sweden	**706.6**	**653.2**	**665.7**	**678.8**
– Bananas	213.6	193.9	190.6	191.2
– Oranges	85.0	72.5	74.7	74.2
TOTAL	**1,413.4**	**1,416.2**	**1,417.2**	**1,412.1**

FRESH VEGETABLES	2017	2018	2019	2020p
Denmark	**188.9**	**210.4**	**214.4**	**201.9**
– Tomatoes	33.7	37.9	37.7	37.3
– Lettuce	23.3	24.1	24.4	24.2
– Cucumbers	21.4	24.7	23.5	22.5
Finland	**128.5**	**136.7**	**131.7**	**118.2**
– Tomatoes	24.8	26.1	26.8	25.8
– Lettuce	26.0	26.1	25.6	23.7
Sweden	**347.6**	**347.2**	**357.2**	**348.9**
– Tomatoes	83.3	85.9	85.5	88.5
– Cucumbers	37.4	34.5	37.9	36.8
TOTAL	**665.0**	**694.2**	**703.3**	**669.0**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Denmark	**39.2**	**45.1**	**47.0**	**43.7**
– Apples	4.2	7.2	7.2	7.6
– Bananas	9.7	8.1	10.7	3.7
Finland	**9.2**	**8.4**	**5.7**	**6.1**
Sweden	**47.5**	**56.8**	**53.9**	**45.6**
TOTAL	**95.8**	**110.3**	**106.6**	**95.4**

FRESH VEGETABLES	2017	2018	2019	2020p
Denmark	**56.0**	**58.5**	**52.7**	**53.3**
– Carrots	33.9	29.8	25.1	29.7
– Onions	7.1	8.6	7.6	5.1
Finland	**0.6**	**1.0**	**2.0**	**1.8**
Sweden	**19.7**	**17.6**	**18.8**	**17.4**
TOTAL	**76.4**	**77.1**	**73.4**	**72.6**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	1,603	1,661	1,601	1,704
Export	128	130	132	127
TRADE BALANCE	**-1,475**	**-1,531**	**-1,469**	**-1,577**

FRESH VEGETABLES	2017	2018	2019	2020p
Import	1,029	1,057	1,090	1,097
Export	114	131	137	132
TRADE BALANCE	**-915**	**-926**	**-953**	**-965**

Population 47.3 m

Area 506,000 km²

GDP per Inhabitant 26,430 EUR

GDP Growth 2.0 per cent

Unemployment 9.1 per cent

CPI for Food (2015=100) 104.3

SPAIN

Spanish fruit production in 2020 was characterised by a reduced stone fruit harvest due to a late frost and heavy rains in April. The citrus harvest exceeded the previous year's volumes, but was below the high expectations before the start of the season due to heavy rainfall at the beginning of November. Besides citrus fruits, exotics have gained in importance in cultivation in recent years. For both mangoes and avocados, new plantings reached the production phase in 2020. Production is concentrated on Andalusia, but avocados in particular are also increasingly grown in Valenciana. There will be shifts in cultivation for the 2021 Spanish soft fruit season. In the most important region Huelva, the planted area of strawberries has been minimally reduced, and the cultivation of raspberries has also been cut back. The area under blueberries continues to grow, and investments have been made in the cultivation of very early varieties that already deliver limited quantities at the beginning of the year.

For years, vegetable production has been characterised by an increase in area for peppers and a decline in area for tomatoes. Strong competition at the export market for tomatoes is blamed for this, both from North Africa and the Northwest European countries. However, the decline in Spanish vegetable production 2020 is mainly due to the fact, that the onion harvest fell short in comparison to the record quantities of the previous year.

Water shortage is a prevalent issue in many intensive fruit and vegetable growing regions and often has a limiting effect on new plantings. In Almeria the price of desalinated water is high and there is a lack of investment in desalination facilities. With steadily increasing acreage, the urgency to change this situation is high. The Almeria region not only supplies large parts of Spain with fresh vegetables and other agricultural products, but is also the strongest export region in Spain for fresh vegetables.

As in most other European countries, the Covid-19 pandemic was the dominant theme in Spain in 2020. During the first wave, Spain had a strict lockdown from mid-March to June. Especially in April and May, this led to a strong increase in demand for private in-house consumption of fruit and vegetables. In April, the purchase quantities of fruit and vegetables rose by 40 per cent, while expenditure increased by as much as 55 per cent. Almost all species benefited significantly, with cabbages leading the way with a 100 per cent increase. With the relaxations in May, purchases weakened and the volume increase compared to the previous year was only 22 per cent.

The export industry had the impact of the Brexit in mind. Spain supplies about 12 per cent of its fruit and vegetable exports directly to the UK, a yearly average of 1.5 million tonnes over the past 5 years. Volumes fluctuate slightly but show no trend. The share by value was 13 per cent in 2019. Vegetable exports to the UK are dominated by cabbages, lettuces, onions and the three major fruit vegetables tomatoes, peppers and cucumbers. The major fruits are easy-peelers, oranges and watermelons.

PRODUCTION

VOLUME ('000 tonnes)

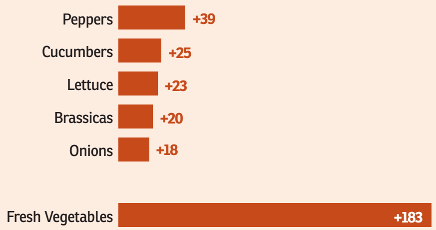
FRESH FRUIT	2017	2018	2019	2020p
Oranges	3,369	3,930	3,280	3,400
Easy peelers	1,996	2,385	1,832	2,100
Watermelons	1,113	1,092	1,200	1,268
Lemons	928	1,149	931	1,031
Melons	656	664	660	623
Peaches [1]	709	623	666	487
Apples [1]	496	484	556	511
Nectarines	719	547	605	472
Table grapes	266	273	332	352
Strawberries	360	345	352	272
Other	2,696	2,752	2,844	2,684
TOTAL	13,308	14,244	13,258	13,200

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Tomatoes [1]	2,046	2,070	1,796	1,755
Peppers [1]	1,151	1,155	1,270	1,424
Onions	1,303	1,431	1,600	1,132
Lettuce	976	935	1,005	996
Cucumbers	634	644	739	804
Courgettes	587	596	606	600
Broccoli	541	543	532	540
Carrots	390	382	384	408
Aubergines	226	238	245	282
Other	1,898	1,874	1,933	1,981
TOTAL	9,752	9,868	10,110	9,922

1) Excluding products grown for processing. 2) Excluding potatoes.
Sources: AMI-informiert.de; DGA; Eurostat; Fepex; Mapama; WAPA

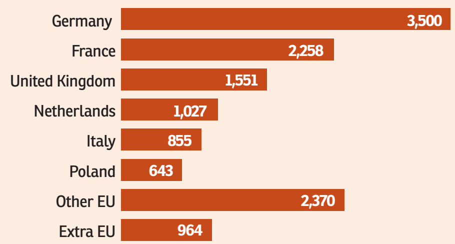
TOP 5 FRESH VEGETABLE EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2010-2019)



FRUIT AND VEGETABLE EXPORTS 2019

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	307	365	361	335
Oranges	174	175	149	180
Apples	192	167	195	175
Avocado	98	129	136	160
Other	935	1,012	942	1,000
TOTAL	1,706	1,848	1,783	1,850

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Tomatoes [1]	99	110	130	140
Beans	121	144	120	135
Onions	54	87	82	90
Other	307	301	303	305
TOTAL	581	642	635	670

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Oranges	1,604	1,528	1,757	1,620
Easy peelers	1,356	1,369	1,372	1,310
Watermelons	739	862	910	840
Lemons	689	600	734	730
Melons	441	405	456	440
Nectarines	469	357	429	355
Peaches	454	382	400	335
Strawberries	304	279	293	285
Persimmons	215	168	210	190
Other	1,202	1,189	1,263	1,245
TOTAL	7,473	7,139	7,824	7,350

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Peppers	689	746	829	850
Lettuce	762	795	760	750
Tomatoes	810	813	767	720
Cucumbers	627	649	704	700
Brassicas	447	486	484	480
Courgettes	320	362	415	430
Onions	337	353	405	370
Garlic	166	152	184	190
Aubergines	144	155	159	165
Other	547	580	638	655
TOTAL	4,849	5,091	5,345	5,310

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	1,740	1,951	2,009	2,200
Export	7,437	7,543	7,790	8,300
TRADE BALANCE	5,697	5,592	5,781	6,100

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Import	565	597	633	636
Export	5,174	5,161	5,600	5,820
TRADE BALANCE	4,609	4,564	4,967	5,184

Population
67.0 m

Area
248,500 km²

GDP per Inhabitant
37,830 EUR

GDP Growth
1.4 per cent

Unemployment
2.6 per cent

CPI for Food
(2015=100)
107.8

UNITED KINGDOM

The UK left the EU on 31 January 2020. After that, a transition period with unchanged regulations was in place until 31 December 2020. From 1 January 2021, a new agreement applies. The EU member states and the UK parliament approved the agreement, first provisionally, because time to check was limited. Even though efforts have been made to keep trade barriers low, new paperwork will be necessary when goods are crossing the border. During the first days of 2021, trade at the borders was mainly problem-free. But at the beginning of January trade was still at a low level, with only a fraction of the usual quantities being moved. It therefore remains to be seen how the new conditions will affect future trade.

A high proportion of the demand for vegetables and especially fruits is covered by imports. Very low exports result in a negative trade balance, which has tended to increase in recent years. In terms of fruit and vegetables, the EU is an important supplier. According to preliminary data, about 85 per cent of vegetable imports came from the EU in 2020. For fruit, the volume is much lower at 33 per cent due to the high share of tropical fruits and exotics in fruit imports.

Vegetable production is characterised by a strong carrot sector. Carrots are not only the most important crop in British vegetable production, but they are also the number one most commonly purchased fresh vegetable in the country. In addition, the self-sufficiency rate is high at almost 100 per cent. Onions are second in production and number three in household purchases. In onion production, 2020 saw the driest and sunniest May on record. This led to a poor emergence on heavier soil and later drillings, so that onion yields were only around average.

Berries are on the rise, not only in the UK but across the whole of Europe. During the last ten years, UK production of strawberries has increased by 4.4 per cent each year. Purchases of berries and currants have increased by 22 per cent in four years. The assortment is dominated by strawberries with a share of nearly 70 per cent, followed by blueberries and raspberries. A high self-sufficiency-rate characterises the strawberry market. In tomatoes meanwhile, self-sufficiency is low and has been decreasing for years; there has been little investment in greenhouse growing over the past ten years. Traditional regions have been losing acreage for years under pressure from high energy prices and cheap vegetable imports. For example, the area of tomatoes and cucumbers grown under glass declined from 2010 to 2018.

But the British horticultural sector also faces structural challenges. For example, it suffers from staff shortages in general and it is not unlikely that strict immigration policies could worsen the situation after Brexit. To prevent this, an extended immigration scheme by the government is discussed. With all the changes the UK is facing, one major challenge has so far remained unspoken, but is of major importance. The UK has been hit heavily by Covid-19 and still shows high infection rates at the beginning of January 2021.

PRODUCTION

VOLUME ('000 tonnes)

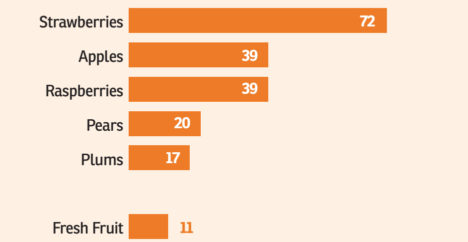
FRESH FRUIT [1]	2017	2018	2019	2020p
Apples	206	219	205	207
Strawberries	127	141	142	143
Pears	27	27	28	29
Raspberries	17	16	17	17
Blackcurrants	14	15	13	14
Plums	8	9	7	8
Cherries	7	4	6	6
Other soft fruit	11	10	10	10
Other	4	5	5	5
TOTAL	421	446	433	439

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Carrots	887	772	758	780
Onions	454	332	454	451
Cabbage	224	178	153	165
Peas [1]	125	119	153	140
Lettuce	99	92	99	98
Cauliflower	87	88	89	88
Parsnips	90	81	80	80
Turnips/Swede	85	78	72	75
Tomatoes	86	67	61	62
Celery	53	54	54	54
Other	379	343	339	344
TOTAL	2,569	2,204	2,312	2,337

1) Including products grown for processing. 2) Excluding potatoes.
Sources: AMI-informiert.de; Defra; Eurostat

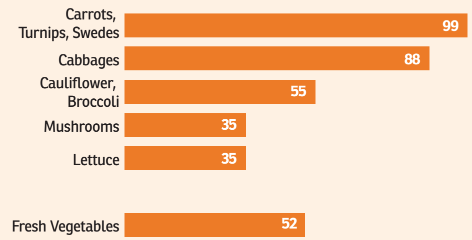
TOP 5 FRESH FRUIT

SELF-SUFFICIENCY RATE (%, 2019)



TOP 5 FRESH VEGETABLE

SELF-SUFFICIENCY RATE (%, 2019)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	1,235	1,074	1,074	1,075
Apples	525	372	336	330
Melons	306	319	319	312
Easy peelers	289	288	290	290
Table grapes	271	274	282	277
Oranges	287	271	265	260
Lemons/Limes	154	160	161	160
Pineapples	168	160	160	158
Pears	133	120	114	114
Other	643	623	635	624
TOTAL	4,013	3,661	3,636	3,600

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Onions	342	400	457	440
Tomatoes	398	411	406	396
Lettuce	192	216	215	219
Peppers	196	194	202	212
Cucumbers	160	169	187	186
Cauliflower/Broccoli	136	138	133	132
Mushrooms	126	130	131	130
Celery	73	54	53	54
Other	561	556	525	562
TOTAL	2,184	2,268	2,309	2,331

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Oranges	31	29	33	32
Bananas	59	29	27	27
Pineapples	18	27	27	23
Other	69	71	74	70
TOTAL	177	156	161	152

FRESH VEGETABLES	2017	2018	2019	2020p
Carrots/Turnips	23	29	30	22
Cauliflower/Broccoli	8	7	8	6
Onions	6	6	7	5
Other	92	103	97	102
TOTAL	129	145	142	135

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2017	2018	2019	2020p
Import	4,515	4,454	4,520	4,650
Export	182	182	184	190
TRADE BALANCE	-4,333	-4,272	-4,336	-4,460

FRESH VEGETABLES	2017	2018	2019	2020p
Import	2,826	2,888	2,918	2,900
Export	129	153	159	160
TRADE BALANCE	-2,697	-2,735	-2,759	-2,740

Population
6.9 m

Area
88,400 km²

GDP per Inhabitant
6,620 EUR

GDP Growth
4.2 per cent

Unemployment
6.3 per cent

CPI for Food
(2015=100)
108.8

SOUTHEAST EUROPE

SERBIA

In Serbia, agriculture and especially fruit growing is an important business. Through area expansion as well as investment in storage, it has developed into one of the most important fruit producers in south-east Europe. According to AMI estimations it produced approximately 1.8 million tonnes of fruit in 2020. In the same year, vegetable production of 645,000 tonnes was larger than the previous year's harvest.

Meanwhile, the fruit area amounts to 190,000ha, of which about 20 per cent is cultivated with berries. Due to the global boom, berries in particular are the most important export commodity in terms of quantity and value. This has recently led to further expansion: While berries were cultivated on an area of 17,630ha in 2013, the current figure is around 38,000ha. Serbia has always been known for its raspberries and is one of the world's most important producers with an area of 25,400ha and a production of 129,000 tonnes in 2020. The majority of this leaves the country as frozen fruit – around 120,000 tonnes in 2020. Blueberries are expanding strongly. While raspberry cultivation is structured on a small area, a few blueberry farms have established extensive areas with the most modern production technology. Currently, the blueberry area is estimated at 2,500ha. Since these areas have not yet reached their full production potential, increasing harvest quantities can be expected in the coming years. Serbia's apple production has increased rapidly. With a production of almost 500,000 tonnes of apples in 2020, Serbia is one of the leading producers in southeast Europe. With investments in modern and intensive apple facilities, it was also necessary to increase the storage capacity. ULO as well as CA storage facilities were built, so that now 600,000-650,000 tonnes can be stored nationwide.

Looking back at the effects of the coronavirus pandemic, exports of agricultural products have developed positively. The export of apples, pears and stonefruit for example increased 20 per cent in the first half of 2020. Consumption of fresh fruit and vegetables is also reported to have increased by 20 per cent during the first wave, compared with normal trading. But at the very beginning of the health crisis in March 2020, individual vegetable producers were hit hard by public market closures and lockdowns. Long-term contracts with supermarket chains were a blessing to producers of perishable goods at those times. The crisis also required a rethink of previous trade routes, prompting some fruit and vegetable producers to invest in online trade. Supermarket chains and food shops are still seeing increases in the sale of healthy snacks, fruits, vegetables, meat and all other foods online.

Serbia has a free trade agreement with the EU through the Stabilization and Association Process. After Brexit, Serbia needs to sign a legal framework which would clearly define the rules of cooperation in the future. In the last ten years, Serbia has rapidly increased its exports of both fresh and processed fruit and vegetables to the UK – between 2009 and 2019, these increased by a factor of six to around 18,700 tonnes, even if that was driven by frozen raspberries.

PRODUCTION

VOLUME ('000 tonnes)

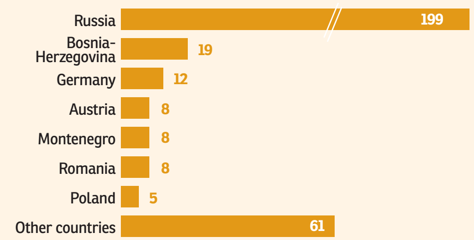
FRESH FRUIT	2017	2018	2019	2020p
Plums	331	430	559	583
Apples	379	460	500	489
Sour cherries	92	128	97	166
Melons	247	199	163	160
Raspberries	110	127	120	129
Peaches/Nectarines	81	74	70	75
Pears	52	54	55	57
Apricots	41	25	41	35
Blackberries	28	35	32	35
Other	115	107	100	151
TOTAL	1,476	1,639	1,737	1,880

FRESH VEGETABLES	2017	2018	2019	2020p
Brassicas	262	209	178	195
Peppers	199	135	118	125
Tomatoes	171	132	112	120
Leguminous crops	51	40	35	40
Cucumbers	58	43	30	35
Carrots	31	22	40	30
Onions	33	28	30	30
Other	72	53	65	70
TOTAL	877	662	608	645

Sources: AMI-informiert.de; Eurostat; Statistical Office of the Republic of Serbia

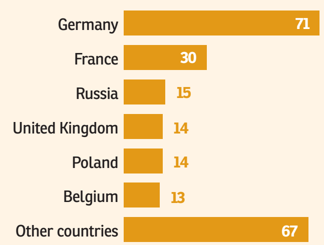
FRESH FRUIT EXPORTS 2019

BY DESTINATION ('000 tonnes)



FROZEN FRUIT EXPORTS 2019

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bananas	66	76	78	85
Oranges	36	42	41	45
Apples	66	36	33	35
Easy peelers	21	29	29	30
Other	93	82	78	90
TOTAL	282	264	259	285

FRESH VEGETABLES	2017	2018	2019	2020p
Tomatoes	28	32	32	35
Onions	5	14	20	20
Brassicas	10	9	9	10
Other	25	22	29	35
TOTAL	68	77	89	100

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Apples	198	145	217	225
Plums	15	19	20	20
Sour cherries	13	11	12	15
Strawberries	11	10	9	10
Sweet cherries	9	5	6	5
Other	83	52	56	60
TOTAL	329	242	320	335

FRESH VEGETABLES	2017	2018	2019	2020p
Onions	17	20	22	25
Cucumbers/Gherkins	19	17	20	20
Peppers	18	14	14	15
Tomatoes	11	11	9	10
Brassicas	4	7	5	5
Other	28	30	32	35
TOTAL	97	99	101	110

FROZEN PRODUCTS	2017	2018	2019	2020p
Vegetables	**54**	**69**	**64**	**70**
Raspberries	94	103	114	120
Sour cherries	39	28	30	35
Blackberries	29	31	34	35
Other fruit	**44**	**40**	**46**	**50**

TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2017	2018	2019	2020p
Import	146	142	157	195
Export	245	182	203	230
TRADE BALANCE	99	40	46	35

FRESH VEGETABLES	2017	2018	2019	2020p
Import	37	44	63	80
Export	40	40	47	50
TRADE BALANCE	4	-4	-16	-30

Population 10.2 m

Area 116,500 km²

GDP per Inhabitant [1] 4,600 EUR

GDP Growth 2.4 per cent

Unemployment [1] 16.2 per cent

CPI for Food (2015=100) 104.7

SOUTHEAST EUROPE

ALBANIA, BOSNIA-HERZEGOVINA, KOSOVO, NORTH MACEDONIA

The smaller countries in the western Balkan region – Bosnia and Herzegovina, Kosovo, Albania and Macedonia – have a combined population of 10.3 million inhabitants across an area of 12 million hectares, making them comparable to Greece in terms of people and size. While GDP growth in the region was impressive until 2019, preliminary figures for 202 indicate a severe contraction of up to -8 per cent in Albania and Kosovo due to the Covid-19 pandemic. Already high unemployment rates grew in 2020 and informal employment continues to be common.

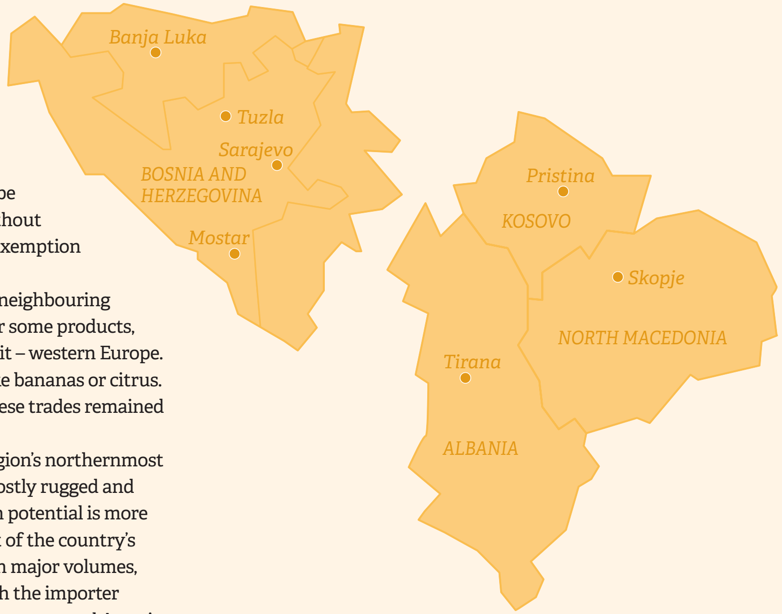
Compared with other sectors, the fruit and vegetable sector in the Western Balkans performed quite well. Vegetable production is higher than fruit production and became also more important in exports in recent years. The EU has extended the validity of the duty-free regime for the import of fruits and vegetables from the countries of the Western Balkans until the end of 2025. Fruits and vegetables originating in Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia shall be admitted for import into the EU without quantitative restrictions and with exemption from customs duties.

Typical export destinations are neighbouring countries, including Russia and – for some products, like plums, tomatoes and frozen fruit – western Europe. Imports are mainly tropical fruit like bananas or citrus. Despite the economic downturn, these trades remained mostly stable.

Bosnia and Herzegovina is the region's northernmost and largest country, and due to a mostly rugged and mountainous terrain, its production potential is more limited. Plums are a prominent part of the country's fruit production and are exported in major volumes, although this depends on how much the importer countries have grown. Exports to Germany and Austria rose again in 2020 but did not reach the record level of 2017. The major destination for apple exports tends to be Russia: it took over 9,000 tonnes in 2019 but only approx. 4,500 tonnes in 2020 in spite of a smaller Russian crop. Berries, mainly raspberries, are also important and production is increasing. A large proportion of the crop is exported as frozen fruit, mainly to western Europe.

Kosovo is much smaller, but also has regions suited to fruit and vegetable production. Due to the regional conflict with Serbia, however, it has been difficult to get detailed data on production and foreign trade. According to EU statistics imports of fresh fruit and vegetables from Kosovo rose considerably in the last five years and amounted to a good €8 million in 2019.

Albania has a long tradition of sending vegetables to western Europe, the main item being tomatoes, which are still important in terms of production and export. **Macedonia** is the region's most important fruit and vegetable producer and exporter, with notable diversification in terms of its apple exports. Russia took a good 14,000 tonnes of apples in 2020. Melon exports are mainly watermelons, while cabbage exports are mainly early white cabbage and Chinese varieties, shipped to neighbouring and eastern European countries.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bosnia-Herzegovina	**233**	**454**	**344**	**400**
– Plums	74	190	114	140
– Apples	52	113	99	110
– Raspberries	23	27	20	20
Kosovo	**71**	**85**	**98**	**95**
Albania	**598**	**537**	**550**	**550**
– Melons	295	291	290	290
– Apples	96	108	100	112
North Macedonia	**249**	**405**	**344**	**370**
– Melons	121	132	126	130
– Apples	44	140	89	110

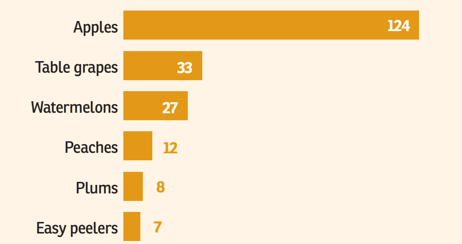
FRESH VEGETABLES	2017	2018	2019	2020p
Bosnia-Herzegovina	**263**	**270**	**272**	**270**
– Cabbage	59	73	75	70
– Tomatoes	46	44	44	45
Kosovo	**114**	**129**	**149**	**150**
Albania	**861**	**854**	**849**	**850**
– Tomatoes	285	288	290	290
– Cucumbers	95	110	120	122
– Onions	99	100	99	100
North Macedonia	**649**	**661**	**646**	**640**
– Tomatoes	160	162	152	152
– Onions	56	59	59	60

1) Albania, Bosnia-Herzegovina and North Macedonia.

Sources: AMI-informiert.de; Comtrade; Eurostat; Kosovo Agency of Statistics

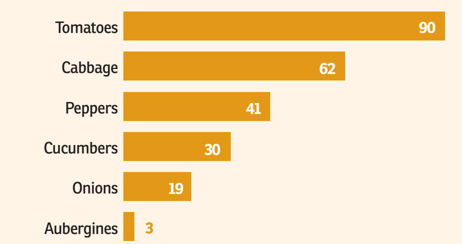
FRESH FRUIT EXPORTS 2019

ALBANIA, BOSNIA, NORTH MACEDONIA ('000 TONNES)



FRESH VEGETABLE EXPORTS 2019

ALBANIA, BOSNIA, NORTH MACEDONIA ('000 TONNES)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bosnia-Herzegovina	**164**	**143**	**192**	**160**
– Bananas	50	53	52	55
– Apples	38	21	28	26
Kosovo	**35**	**32**	**32**	**32**
Albania	**33**	**64**	**70**	**70**
– Bananas	13	21	22	25
North Macedonia	**62**	**67**	**62**	**65**
– Bananas	24	20	21	22

FRESH VEGETABLES	2017	2018	2019	2020p
Bosnia-Herzegovina	**55**	**59**	**62**	**65**
– Tomatoes	17	19	23	25
– Peppers	12	12	14	15
– Onions	8	10	12	13
Kosovo	**20**	**22**	**25**	**25**
Albania	**8**	**7**	**8**	**8**
North Macedonia	**17**	**19**	**21**	**22**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Bosnia-Herzegovina	**38**	**26**	**31**	**30**
– Apples	16	8	15	15
Kosovo	**4**	**4**	**5**	**4**
Albania	**54**	**32**	**50**	**50**
– Watermelons	36	19	25	25
North Macedonia	**105**	**110**	**160**	**120**
– Apples	41	50	103	60
– Table grapes	28	32	28	30

FRESH VEGETABLES	2017	2018	2019	2020p
Bosnia-Herzegovina	**12**	**8**	**9**	**10**
Kosovo	**4**	**5**	**6**	**6**
Albania	**91**	**107**	**110**	**110**
– Tomatoes	70	70	72	72
– Cucumbers	21	17	20	20
North Macedonia	**125**	**124**	**121**	**125**
– Cabbage	61	59	57	60
– Peppers	23	26	32	30
– Tomatoes	25	21	19	23

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

BOSNIA-HERZEGOVINA	2017	2018	2019	2020p
Import	100	99	112	115
Export	50	34	28	35
TRADE BALANCE	-50	-65	-84	-80

NORTH MACEDONIA	2017	2018	2019	2020p
Import	40	46	42	50
Export	88	85	102	95
TRADE BALANCE	48	39	60	45

Population
2.7 m (MDA)
44.4 m (UKR)

Area
33,800 km² (MDA)
603,600 km² (UKR)

GDP per Inhabitant
3,790 EUR (MDA)
3,080 EUR (UKR)

GDP Growth
3.5 per cent (MDA)
3.2 per cent (UKR)

Unemployment
5.1 per cent (MDA)
8.2 per cent (UKR)

EASTERN EUROPE

MOLDOVA, UKRAINE

The Republic of **Moldova**, once the centre of Soviet wine and fruit industry, is now one of the smallest and the least populated countries in Europe. However, the country can undoubtedly be considered as one of the global leaders in per-capita fruit production.

With its population of just under 2.7 million, Moldova annually produces up to one million tonnes of fresh fruit a year, apples, plums and table grapes being the main crops as well as the country's top export earners.

Moldova exports about a third of its annual production of apples and plums, while table grape exports sometimes exceeds 50 per cent of production. Other main fruit export categories include stonefruit, such as cherries, apricots and peaches, and strawberries. Russia is still the main destination for Moldovan fruit exports, and other top include Romania, Ukraine and Belarus.

In vegetables, Moldova is not such a strong player and often relies on imports to satisfy domestic demand.

Imported produce plays an important role in greenhouse vegetable, onion and carrot segments, with Turkey being the main supplier. Turkey is also a leading source of fresh fruit and supplies the Moldovan market mostly with citrus fruits and other products that are not grown domestically.

Ukraine is the second largest European country after Russia and one of the biggest producers of fruit and vegetables in the region and globally. In recent years, the produce sector and the country as a whole has faced many challenges, including the loss of territory, production and consumption bases, lagging economic indicators and political instability. While there are still problems within the industry, which are typical of post-Soviet era countries, the most important steps towards the sector's development have been taken.

In vegetables, Ukraine mainly relies on domestic production, which is supplemented by imports of products whose cultivation needs special climatic conditions, such as greenhouse vegetables and early cabbage. Nevertheless, in 2019 onions became the main vegetable import category due to a significant fall in domestic production the year before.

Unlike vegetables, which are produced mainly for domestic consumption, the Ukrainian fruit industry is more focused on export, especially in apples, watermelons, cherries and blueberries. The Ukrainian apple sector has successfully transformed itself from one using outdated technologies and now offers high-quality fruit. Export destinations include Belarus, the European Union, Middle East and South-East Asia. The country also exports watermelons, mainly to the EU, while cherries and blueberries have also built up a reputation outside of the country.

Ukrainian fruit exporters now benefit from good air logistics for their berry and cherry shipments and are able to reach distant markets such as the UAE, Singapore and Hong Kong. Last but not least, in 2019 Ukraine had the second fastest growing blueberry acreage in the world.

Bananas are still the main fruit category imported into Ukraine and annually account for about 31-34 per cent of total fruit imports. Other key import categories include citrus and stonefruit, as well as table grapes.

PRODUCTION

VOLUME ('000 tonnes)

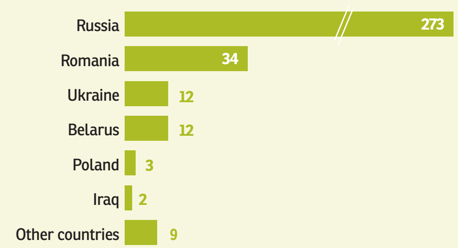
FRESH FRUIT [1]	2017	2018	2019	2020p
Moldova	**812**	**1,046**	**983**	**1,000**
– Apples	487	665	611	650
– Plums	93	133	132	130
– Grapes [2]	109	126	112	120
Ukraine	**2,564**	**3,165**	**2,912**	**2,748**
– Apples	1,076	1,462	1,154	1,175
– Watermelons	351	397	442	440
– Grapes [2]	190	222	237	200
– Plums	200	198	181	180
– Sour cherries	172	219	168	170

FRESH VEGETABLES [1]	2017	2018	2019	2020p
Moldova	**310**	**283**	**307**	**310**
– Tomatoes	62	52	38	40
– Onions	54	44	50	52
– Squashes	40	44	33	40
Ukraine	**9,286**	**9,440**	**9,688**	**9,347**
– Tomatoes	2,267	2,324	2,224	2,200
– Brassicas	1,655	1,638	1,716	1,619
– Onions	977	884	998	1,011
– Cucumbers	896	985	1,034	950
– Carrots	839	842	870	833

1) Including fruits for processing. 2) Excluding grapes grown for wine industry. 3) Excluding potatoes.
Sources: AMI-informiert.de; Comtrade; Fruit-Inform

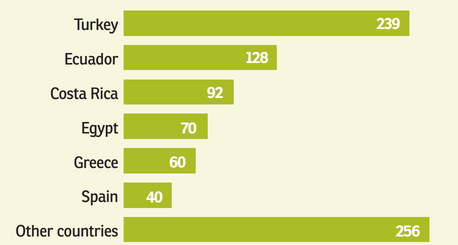
MOLDOVA – FRESH FRUIT EXPORTS

2019 BY DESTINATION ('000 tonnes)



UKRAINE – FRESH FRUIT IMPORTS

2019 BY ORIGIN ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Moldova	**40**	**57**	**58**	**60**
– Bananas	13	14	17	20
– Easy peelers	9	12	13	13
Ukraine	**686**	**730**	**884**	**950**
– Bananas	238	251	281	300
– Easy peelers	133	165	180	185
– Oranges	70	92	92	100
– Lemons	46	52	54	55
– Persimmons	29	33	41	40

FRESH VEGETABLES [3]	2017	2018	2019	2020p
Moldova	**23**	**44**	**47**	**50**
– Tomatoes	8	12	15	17
– Onions	1	11	13	15
Ukraine	**78**	**125**	**227**	**225**
– Tomatoes	35	55	72	90
– Onions	6	15	79	40
– Cucumbers	9	13	18	20

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Moldova	**371**	**335**	**346**	**350**
– Apples	222	216	218	220
– Table grapes	80	48	63	60
– Plums	49	45	44	45
– Sweet cherries	8	12	6	10
Ukraine	**60**	**72**	**78**	**90**
– Apples	23	42	54	45
– Watermelons	18	18	14	32

FRESH VEGETABLES [3]	2017	2018	2019	2020p
Moldova	**7**	**3**	**6**	**5**
– Onions	5	1	4	3
Ukraine	**51**	**54**	**41**	**50**
– Onions	16	21	13	20
– Tomatoes	21	15	9	10
– Cabbage	4	8	8	3
– Cucumbers	4	4	4	2

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

MOLDOVA	2017	2018	2019	2020p
Import	50	73	79	85
Export	96	89	93	95
TRADE BALANCE	**46**	**15**	**14**	**10**

UKRAINE	2017	2018	2019	2020p
Import	414	491	618	700
Export	85	81	53	75
TRADE BALANCE	**-329**	**-410**	**-565**	**-625**

Population	Area	GDP per Inhabitant	GDP Growth	Unemployment
3.7 m (GEO)	69,700 km² (GEO)	4,020 EUR (GEO)	5.1 per cent (GEO)	11.6 per cent (GEO)
33.6 m (UZB)	449,000 km² (UZB)	1.450 EUR (UZB)	5.6 per cent (UZB)	9.9 per cent (UZB)

EASTERN EUROPE

GEORGIA, UZBEKISTAN

Georgia, a small mountainous country, was the most popular holiday destination for Soviet citizens and a well-known supplier of tasty fruits just a few decades ago. After gaining independence, the country had to deal with a series of wars, economic downturns and political crises before it was able to restore its status as a tourist haven and a reliable fruit supplier.

Vegetables do not play an important part in Georgia's fresh produce sector, and the country often has to rely on imports of onions, tomatoes, cucumbers and other vegetable categories. However, it is a large exporter of fresh herbs to Russia, Ukraine and several other countries, with the product range consisting mainly of fresh parsley, dill, basil, coriander, tarragon and chives.

Regarding domestic fruit, Georgia has a traditional focus on easy peelers – its mandarins being popular with Russian and Ukrainian consumers – as well as persimmons and figs, although these are exported in much smaller quantities.

In 2018/19 Georgia became a net exporter of apples following investments in production and trade infrastructure over the past few years. Furthermore, in 2020, the country more than doubled its peach and nectarine exports and set a new record in blueberry exports, with total sales outside of the country exceeding 630 tonnes.

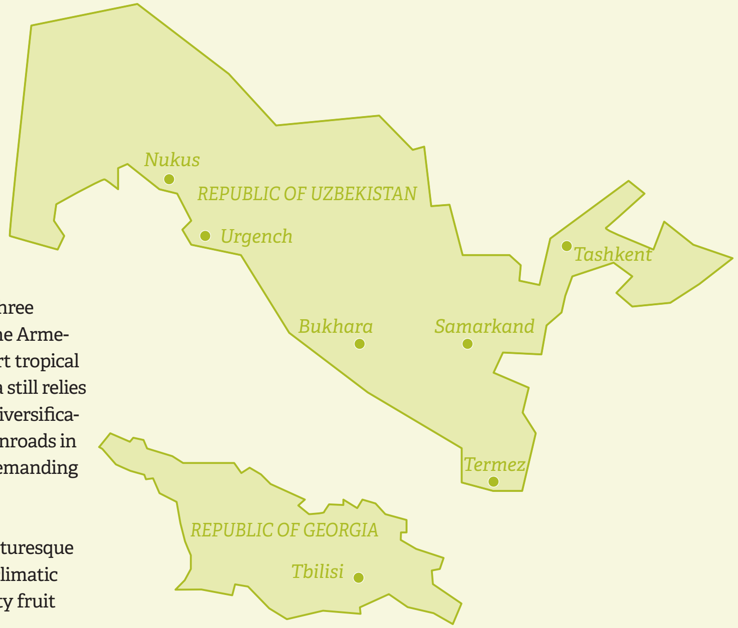
Russia, Armenia and Ukraine are the top three destinations for Georgian fruit exports, and the Armenian market also uses Georgian ports to import tropical and exotic fruits. Despite the fact that Georgia still relies on Russia as its main export market, market diversification in increasing, and the country is making inroads in the European Union, Middle East and other demanding but well-paying markets.

Uzbekistan, the country of eastern bazaars, picturesque valleys and ancient cities, has almost perfect climatic conditions for growing a variety of high-quality fruit and vegetables almost all year round.

However, the country is still transitioning from a post-Soviet and Oriental mind set to a more up-to-date fruit and vegetable business, trade and market organisation. Uzbekistan is also one of just two double-landlocked countries in the world; therefore, logistics and infrastructure development are a crucial for the local fruit and vegetable industry to become competitive in the global market.

Despite all challenges and difficulties, Uzbekistani fruit and vegetables have been gradually gaining popularity in both traditional export markets, such as Kazakhstan or Russia, and new destinations like the Far East, Gulf countries and the European Union. Nevertheless, the Russian Federation is still the main importer of Uzbekistani products, as Kazakhstan is principally a re-export platform in the Uzbekistan-Russia fruit and vegetable trade.

Onions became the top crop of Uzbekistani vegetable exports in 2019 thanks to a twofold rise in their total export volume. Other important vegetables for export usually include early cabbage, greenhouse tomatoes and carrots. The main fruit exports are table grapes, stonefruit, persimmon and melons. In 2019 Uzbekistan also became a major apple exporter, with shipments reaching about 50,000 tonnes in that year.



PRODUCTION

VOLUME ('000 tonnes)

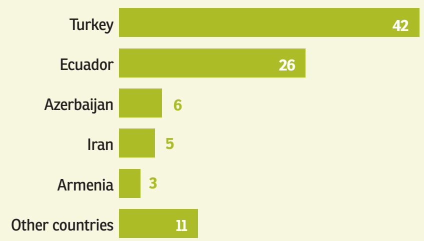
FRESH FRUIT [1]	2017	2018	2019	2020p
Georgia	**235**	**308**	**264**	**260**
– Apples	20	83	44	60
– Easy peelers	55	62	60	60
– Watermelons	68	57	68	55
Uzbekistan	**6,160**	**6,047**	**6,334**	**6,300**
– Grapes	1,626	1,590	1,603	1,600
– Apples	1,029	1,130	1,133	1,300
– Watermelons	1,198	1,084	1,221	1,200
– Melons	833	753	848	800
– Apricots	533	494	536	500

FRESH VEGETABLES [2]	2017	2018	2019	2020p
Georgia	**129**	**147**	**164**	**160**
– Tomatoes	50	52	63	60
– Cucumbers	23	33	30	30
– Brassicas	17	19	29	30
Uzbekistan	**10,220**	**9,760**	**10,215**	**10,000**
– Tomatoes	2,455	2,284	2,145	2,200
– Carrots	2,250	2,185	2,769	2,700
– Onions	995	1,464	1,233	1,200
– Cucumbers	814	857	853	850
– Brassicas	904	743	703	700

1) Including fruits for processing. 2) Excluding potatoes, including vegetables grown for processing. 3) Excluding potatoes.
Sources: AMI-informiert.de; Comtrade; Fruit-Inform

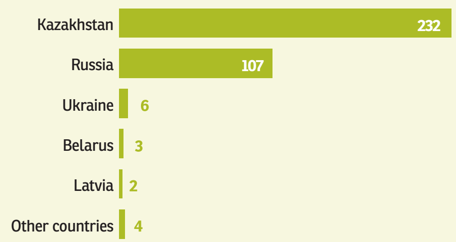
GEORGIA – FRESH FRUIT IMPORTS

2019 BY ORIGIN ('000 tonnes)



UZBEKISTAN – FRESH FRUIT EXPORTS

2019 BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Georgia	**59**	**74**	**94**	**100**
– Bananas	23	26	29	28
– Apples	6	13	5	15
– Oranges	7	9	12	15
– Watermelons	4	5	19	11
– Easy peelers	2	1	7	8
Uzbekistan	**12**	**20**	**36**	**45**
– Easy peelers	2	8	11	11
– Bananas	4	5	14	18

FRESH VEGETABLES [3]	2017	2018	2019	2020p
Georgia	**70**	**79**	**84**	**85**
– Onions	18	27	35	40
– Tomatoes	18	20	15	13
– Cucumbers	8	8	9	7
– Aubergines	8	7	7	6
Uzbekistan	**26**	**1**	**1**	**1**
– Onions	23	0	0	0

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2017	2018	2019	2020p
Georgia	**46**	**58**	**85**	**85**
– Easy peelers	24	30	36	36
– Peaches/Nectarines	11	13	13	25
Uzbekistan	**346**	**332**	**353**	**350**
– Grapes	127	114	93	100
– Peaches/Nectarines	38	54	46	50
– Persimmons	68	49	40	40
– Apricots	21	38	51	50

FRESH VEGETABLES [3]	2017	2018	2019	2020p
Georgia	**12**	**12**	**10**	**11**
– Tomatoes	4	5	2	2
Uzbekistan	**203**	**413**	**478**	**450**
– Onions	26	85	191	100
– Cabbage	35	83	88	70
– Carrots	22	51	38	40
– Tomatoes	47	57	49	45

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

GEORGIA	2017	2018	2019	2020p
Import	58	68	65	70
Export	28	38	52	55
TRADE BALANCE	-30	-30	-13	-15

UZBEKISTAN	2017	2018	2019	2020p
Import	8	9	15	17
Export	311	445	363	400
TRADE BALANCE	303	435	348	383

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