



# FRUIT LOGIS TICA

2018  
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## EUROPEAN STATISTICS HANDBOOK

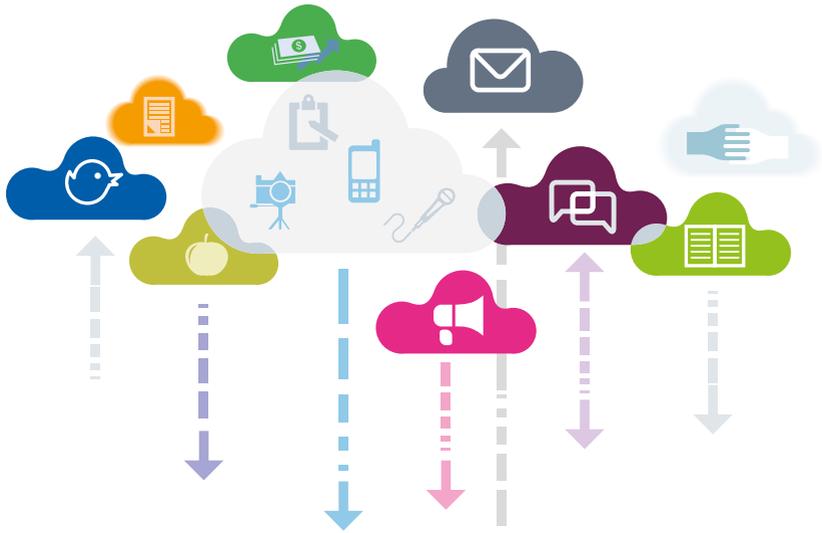
A collection of key production, import and export information, market trends and patterns of trade for Europe's fresh fruit and vegetable business.

Presented at:

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## Europe, a key market for fresh produce

Europe may not be the most dynamic market for fresh produce, but it surely will remain the most important one for a long time. Worldwide, the percentage of fruit exports that go to Europe ranges between 45 per cent and 70 per cent.

Besides, Europe is a big producer of fresh fruit and vegetables itself, with approximately 12 per cent of global production. For several products, like apples or onions, Europe has switched from being a net importer to a net exporter in the last few years.

Trade flows and consumption habits are subject to constant change, but not all trends are consistent. While European exporters are looking for more distant destinations, consumers are looking for sustainably produced fruit and vegetables in their own regions; convenience is in demand everywhere, even though not all consumers are willing to admit it; and ethics are influencing buying decisions more and more. In the end, however, price still matters.

Wherever you work in the fresh produce industry, the European Statistics Handbook provides valuable information that can help you make decisions in the most important European markets – including, in this edition, a special focus on Southeast Europe.



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**EUROFRUIT**

Presented at:





**Population**  
11.4 m



**Area**  
30,500 km<sup>2</sup>



**GDP per Inhabitant**  
37,500 EUR



**GDP Growth**  
1.5 per cent



**Unemployment**  
4.7 per cent



**CPI for Food**  
(2015=100)  
101.9

# BELGIUM

Although Belgium is only a small country in Europe in terms of area, it is an important hub for European imports and exports, thanks to the seaports in Antwerp and Bruges-Zeebrugge. It's not simply Belgian pears that are shipped via the country; kiwifruit from New Zealand also arrive in Zeebrugge, while many exotic fruits enter exclusively through Belgium on their journey to destinations within Europe. Other arrivals, such as citrus or stonefruit, are destined for domestic consumption.

The mainstays of Belgian fruit production are apples and pears. Cultivation of the latter has been extended at the expense of the former in recent years. Currently, pears are grown on 10,000ha and apples on approximately 6,200ha. Much of the fruit is produced in Flanders, in the region around Sint-Truiden (Limburg province), while most of the vegetables are grown in Flanders. Important growing regions can be found in Sint-Katelijne-Waver, Roeselare and Hoogstraaten. Tomatoes, leeks, carrots, salads and chicory are important crops produced in Belgium.

While apple production is dominated by the varieties Jonagold and Jonagored, the main pear variety is Conference. Once exotic fruits are excluded, pears lead the Belgian fruit export trade. Because of the Russian embargo, new markets outside Europe have been opened: Conference pears are now exported to China, India, Brazil and Vietnam, for example.

A large part of Belgium's fruit and vegetable production is marketed through auctions known as Veilingen. According to the Association of Belgian Horticultural Cooperatives (VBT), its members' turnover amounted to €926.4m in 2016 – with vegetables accounting for 64 per cent and fruit 36 per cent. Based on sales volume, pears led the way ahead of tomatoes and apples. In terms of value, tomatoes, strawberries and pears were the top performers in recent years.

Belgium is also the largest producer of frozen vegetables in Europe. In 2016, production once again rose to one million tonnes, accounting for a good quarter of total European production. Production is centred around south and west Flanders, and around 90 per cent of production is exported. Important destinations are neighbouring countries like France, Germany and the Netherlands; and recently 86 per cent of exports have ended up in EU markets. For third countries, the US and Australia received the largest quantities.

In recent years, Belgium has imported about twice as much fruit as vegetables. In both cases, it is a net importer. It also imports typical vegetable crops like peas, beans and cauliflower from neighbouring countries for processing



## PRODUCTION

VOLUME ('000 tonnes)

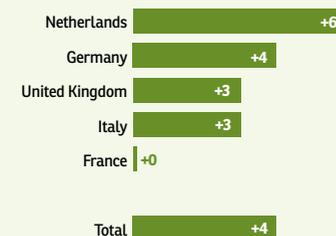
FRESH FRUIT	2014	2015	2016	2017p
Pears	374	369	322	302
Apples	318	285	234	86
Strawberries	39	48	45	43
Other	12	11	10	10
<b>TOTAL</b>	<b>743</b>	<b>713</b>	<b>611</b>	<b>441</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Tomatoes	249	253	260	262
Leeks	154	130	96	105
Carrots	81	63	93	80
Lettuce	43	43	41	39
Chicory Witlof	39	40	39	40
Peppers	25	25	27	28
Cucumbers	18	17	24	22
Courgettes	12	13	15	15
Celery	12	15	14	16
Other <sup>2)</sup>	1,095	1,029	1,114	1,090
<b>TOTAL</b>	<b>1,728</b>	<b>1,628</b>	<b>1,723</b>	<b>1,679</b>

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

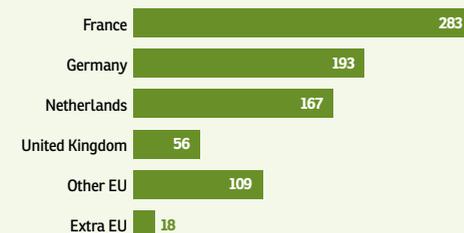
## TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2007-2016)



## FRESH VEGETABLE EXPORTS 2016

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VLAM

## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Exotics	1,723	1,620	1,699	1,720
Citrus	250	252	269	280
Apples	140	152	131	200
Peaches	60	67	65	70
Other	234	228	248	240
<b>TOTAL</b>	<b>2,407</b>	<b>2,319</b>	<b>2,412</b>	<b>2,510</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Carrots/Turnips	250	257	281	295
Onions/Shallots	129	139	141	130
Peas	133	115	112	117
Cucumbers	64	84	96	90
Tomatoes	99	93	88	85
Green Beans	69	69	76	80
Cauliflower	28	30	32	33
Other	304	310	357	360
<b>TOTAL</b>	<b>1,076</b>	<b>1,097</b>	<b>1,183</b>	<b>1,190</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Exotics	1,570	1,466	1,467	1,490
Pears	328	306	328	320
Apples	178	232	212	200
Strawberries	42	52	41	45
Other	128	128	103	125
<b>TOTAL</b>	<b>2,246</b>	<b>2,184</b>	<b>2,151</b>	<b>2,180</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	229	232	223	235
Carrots/Turnips	135	137	139	130
Leeks	73	74	69	78
Cucumbers	46	62	68	70
Onions/Shallots	50	49	57	60
Peppers	33	41	40	45
Celery	28	31	33	35
Chicory	19	18	19	19
Other	221	202	195	200
<b>TOTAL</b>	<b>834</b>	<b>846</b>	<b>843</b>	<b>872</b>

## TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	2,299	2,324	2,506	2,700
Export	2,019	1,992	2,008	2,100
<b>TRADE BALANCE</b>	<b>-280</b>	<b>-332</b>	<b>-498</b>	<b>-600</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	744	829	906	875
Export	674	801	826	830
<b>TRADE BALANCE</b>	<b>-70</b>	<b>-28</b>	<b>-80</b>	<b>-45</b>



**Population**  
511.8 m



**Area**  
4,381,300 km<sup>2</sup>



**GDP per Inhabitant**  
29,100 EUR



**GDP Growth**  
1.9 per cent



**Unemployment**  
5.5 per cent



**CPI for Food**  
(2015=100)  
100.3

# EUROPEAN UNION

Europe's climate is hugely varied, which means it can produce a wide range of products on a large scale, with the notable exception of tropical fruits. The continent's largest vegetable producers are Spain and Italy, which together make up about 42 per cent of total European production, followed by Poland, France and the Netherlands. The majority of Poland's production goes for processing. Tomatoes are the most important product in terms of production volume, followed by onions and carrots. Tomatoes account for around 31 per cent of European vegetable production, although most of this volume is used for processing.

Spain and Italy are also the leading fruit-producing nations, followed by Poland, France and Greece. Apples are almost as dominant as tomatoes are for vegetables.

However, their share of total fruit production is only 27 per cent and processing is comparatively less prominent. Other major fruits include oranges and easy peelers. Strawberries and other berries are being produced to an increasing extent, although despite being high in value their volumes are not big enough for a place among the top eight fruits.

Despite its strong production potential, the EU also depends on imports of fruit and vegetables. Its trade balance is negative for both, although the deficit for fruit is much larger – this is because bananas and other tropical fruits are only produced in minor quantities in the EU.

The vegetable trade is concentrated on product flows between the EU countries. Only around 13 per cent of vegetable imports come from third countries. The most important source of vegetables outside the EU is Morocco, followed by Israel and Egypt. Within the EU, Spain and the Netherlands are the main sources. Germany, France and the UK are the main importers. Only 13 per cent of EU production is exported to third countries. The share of third-country exports is high for onions: Russia has long been the most important export destination outside the EU, but this changed after the import ban in August 2014. Belarus, Senegal and Brazil were the most important third-country destinations recently, with mainly onions exported to the latter two.

Fruit tends also to be traded mostly within the EU itself. However, the share of imports from third countries is significantly higher than it is for vegetables. In fact, around 40 per cent of fruit imports come from countries outside the EU – the main sources being Costa Rica, Colombia, Ecuador and South Africa. Within the EU, Spain, the Netherlands and Italy are the most important origins. Bananas lead in terms of import volume, followed by oranges and apples. Exports to countries outside the EU account for about 16 per cent of total export volumes. The main destinations for fruit from the EU are Germany, France and the UK. The most important third country is Belarus.

## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Apples	12,648	12,417	12,033	9,300
Oranges	6,020	6,192	6,364	5,900
Easy Peelers	3,401	3,060	3,262	3,000
Watermelons	2,706	2,876	2,953	3,000
Pears	2,437	2,408	2,179	2,100
Peaches	2,366	2,266	2,198	2,400
Table Grapes	1,648	1,726	1,779	1,700
Melons	1,839	1,820	1,775	1,700
Nectarins	1,516	1,488	1,368	1,480
Other	9,831	10,270	10,922	11,920
<b>TOTAL</b>	<b>44,412</b>	<b>44,523</b>	<b>44,833</b>	<b>41,700</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Tomatoes <sup>2)</sup>	15,737	17,624	17,961	16,900
Onions	6,347	6,140	6,594	6,000
Carrots	5,558	5,083	5,597	5,400
Head Cabbage	3,758	3,632	3,822	4,000
Cucumbers	2,907	2,713	2,765	2,600
Peppers	2,484	2,516	2,514	2,500
Headed Lettuce	2,410	2,455	2,283	2,100
Cauliflower	2,332	2,296	2,325	2,250
Courgettes	1,358	1,450	1,528	1,500
Other	15,978	14,132	12,585	13,550
<b>TOTAL</b>	<b>58,870</b>	<b>58,041</b>	<b>57,974</b>	<b>56,800</b>

1) Excluding potatoes. 2) Including tomatoes for processing.

Sources: AMI-informiert.de; Eurostat

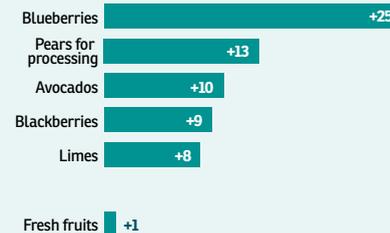
## TOP 8 VEGETABLE PRODUCERS 2016

(million tonnes)



## TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2007-2016)



## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	7,805	8,133	8,466	9,300
Oranges	2,679	2,936	2,938	2,800
Apples, fresh market	2,507	2,906	2,530	2,530
Easy Peelers	2,048	2,112	2,181	2,000
Table Grapes	1,525	1,554	1,564	1,690
Watermelons	1,218	1,387	1,535	1,660
Pineapples	1,406	1,231	1,304	1,390
Lemons	943	1,088	1,168	1,260
Pears	1,109	1,109	1,099	1,090
Other	6,646	7,286	7,553	8,080
<b>TOTAL</b>	<b>27,886</b>	<b>29,743</b>	<b>30,339</b>	<b>31,800</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	3,072	3,182	3,047	3,020
Onions	1,493	1,419	1,478	1,400
Peppers	1,339	1,352	1,348	1,360
Lettuce	1,271	1,305	1,314	1,370
Cucumbers	1,252	1,306	1,301	1,290
Carrots	972	1,096	1,113	1,060
Cauliflower	538	531	520	590
Courgettes	405	389	454	440
Mushrooms	409	435	418	410
Other	3,314	3,331	3,491	3,690
<b>TOTAL</b>	<b>14,064</b>	<b>14,346</b>	<b>14,485</b>	<b>14,630</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Apples	3,687	4,141	3,651	3,540
Bananas	2,781	2,814	2,827	3,300
Oranges	2,402	2,634	2,541	2,290
Easy Peelers	2,118	2,086	2,061	1,770
Other	10,310	10,840	10,937	11,800
<b>TOTAL</b>	<b>21,298</b>	<b>22,515</b>	<b>22,016</b>	<b>22,700</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	3,023	3,023	2,879	2,760
Onions	1,954	2,124	2,055	2,320
Lettuce	1,388	1,420	1,436	1,440
Peppers	1,524	1,309	1,301	1,405
Other	6,707	6,886	6,897	7,075
<b>TOTAL</b>	<b>14,597</b>	<b>14,763</b>	<b>14,567</b>	<b>15,000</b>

## TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	25,206	28,514	30,529	32,300
Export	18,828	20,836	21,588	22,670
<b>TRADE BALANCE</b>	<b>-6,378</b>	<b>-7,678</b>	<b>-8,941</b>	<b>-9,630</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	14,044	15,736	16,166	17,300
Export	13,155	14,554	15,058	16,110
<b>TRADE BALANCE</b>	<b>-889</b>	<b>-1,182</b>	<b>-1,108</b>	<b>-1,190</b>



**Population**  
67.0 m



**Area**  
633,200 km<sup>2</sup>



**GDP per Inhabitant**  
33,300 EUR



**GDP Growth**  
1.2 per cent



**Unemployment**  
6.1 per cent



**CPI for Food**  
(2015=100)  
100.7

# FRANCE

Like Europe itself, France's size and varied climate enable it to produce a wide range of fruit and vegetables, with the addition of bananas and other exotic fruits from its overseas departments. But France imports a huge amount of fruits and vegetable as well, resulting in a negative trade balance. This deficit has in fact increased from year to year, with imports of both fruit and vegetables growing faster than exports.

The long-term development of French fruit production shows a slightly negative trend. Pear production in particular has decreased considerably since 2006, while production of apples and apricots was more or less stable during that time. A decrease in fruit production during 2017 was mainly due to a smaller apple harvest.

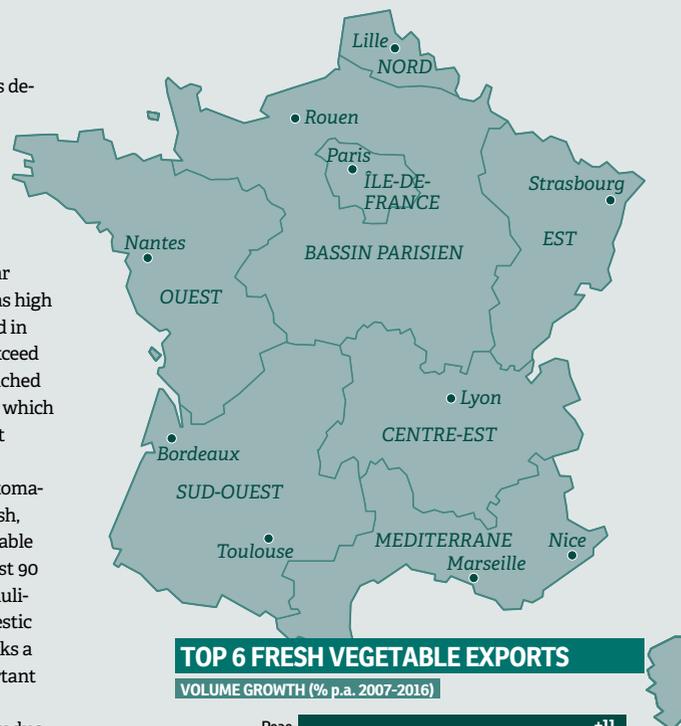
Banana production in those overseas departments decreased because of heavy storms in the Caribbean in September.

The trade balance for apricots has been positive for many years. In 2016, exports reached 42,000 tonnes, whereas imports were just 20,400 tonnes. Production of peaches and nectarines was estimated to be slightly higher in 2017 than the year before. Across Europe, availability of stonefruit was high and French households bought more than they did in 2016. Imports of peaches and nectarines usually exceed exports significantly, and in 2016 the difference reached 130,000 tonnes. French melon production, most of which is the Charentais variety, remained stable in 2017 at around 14,000ha.

French vegetable production is dominated by tomatoes, carrots and onions. These are mainly sold fresh, although an important part of the country's vegetable production is sold for processing – including at least 90 per cent of all peas, green beans and sweetcorn. Cauliflower is an important vegetable for France's domestic market and its exports, but during production peaks a large quantity ends up being processed – an important means of stabilising the fresh market.

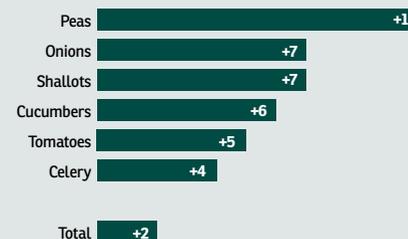
A long-term view suggests French vegetable production is decreasing and imports are increasing. Tomatoes are the most important veg export, but also the largest import. Carrots are second, even though France harvests carrots nearly all through the year (with a small gap from April to mid-May). Cauliflower and chicory are traditional French export items, helping it to defend its positive trade balance.

French consumers mainly buy their fresh fruit and vegetables in big supermarkets (hypermarché). However, their share of the market (about one-third) has not grown in recent years, while discounters have cornered only a little more than 10 per cent. It is interesting to note the success of the so-called 'green multiples' format in France: these 'grand surface frais' stores only sell fresh produce and have stopped the sales decline among greengrocers.



## TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2007-2016)



## FRESH FRUIT EXPORTS 2016

BY DESTINATION ('000 tonnes)



## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT <sup>1)</sup>	2014	2015	2016	2017p
Bananas	616	599	577	670
Oranges	449	490	503	550
Clementines	285	257	256	150
Melons	175	177	172	170
Apples	153	182	172	175
Peaches <sup>3)</sup>	148	165	171	178
Watermelons	119	149	167	185
Others	1,400	1,462	1,572	1,707
<b>TOTAL</b>	<b>3,225</b>	<b>3,331</b>	<b>3,422</b>	<b>3,600</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	556	540	539	535
Carrots	143	144	152	156
Peppers	141	142	151	150
Courgettes	135	128	150	135
Onions	129	128	142	130
Cucumbers	74	74	77	75
Others	690	712	733	709
<b>TOTAL</b>	<b>1,868</b>	<b>1,869</b>	<b>1,945</b>	<b>1,890</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT <sup>1)</sup>	2014	2015	2016	2017p
Apples	688	610	564	520
Bananas	307	287	255	260
Oranges	36	47	46	44
Melons	33	44	42	41
Apricots	64	53	42	55
Others	359	367	340	370
<b>TOTAL</b>	<b>1,486</b>	<b>1,407</b>	<b>1,289</b>	<b>1,290</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	249	243	248	242
Carrots	83	106	119	105
Beans	100	82	108	115
Onions	84	92	98	75
Cauliflower <sup>4)</sup>	141	143	96	145
Peas	52	63	60	70
Other	313	333	328	318
<b>TOTAL</b>	<b>1,021</b>	<b>1,063</b>	<b>1,056</b>	<b>1,070</b>

## TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	3,560	4,164	4,442	4,600
Export	1,526	1,601	1,567	1,570
<b>TRADE BALANCE</b>	<b>-2,034</b>	<b>-2,563</b>	<b>-2,876</b>	<b>-3,030</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	1,776	2,012	2,132	2,220
Export	962	1,037	1,078	1,120
<b>TRADE BALANCE</b>	<b>-814</b>	<b>-975</b>	<b>-1,054</b>	<b>-1,100</b>

## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT <sup>1)</sup>	2014	2015	2016	2017p
Apples	1,444	1,674	1,515	1,424
Melons	253	278	252	280
Bananas	291	283	291	220
Plums <sup>2)</sup>	199	165	216	215
Apricots	174	157	116	157
Pears	131	155	138	133
Peaches	124	120	113	118
Nectarines	107	97	94	96
Kiwi fruit	62	67	65	58
Nuts	35	42	40	40
Other	633	488	514	519
<b>TOTAL</b>	<b>3,453</b>	<b>3,526</b>	<b>3,354</b>	<b>3,260</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	786	786	823	770
Carrots	543	563	578	560
Onions	319	384	389	380
Sweetcorn	403	373	311	350
Green Beans	338	305	300	314
Cauliflower	306	290	289	290
Peas	236	235	233	235
Lettuce	238	231	228	225
Chicory	168	170	172	165
Leeks	166	160	151	160
Other	1,690	1,635	1,671	1,641
<b>TOTAL</b>	<b>5,193</b>	<b>5,132</b>	<b>5,145</b>	<b>5,090</b>

1) Including overseas departments. 2) Including greengages and mirabelles. 3) Including nectarines and clingstones. 4) Including broccoli. 5) Including nuts.

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



**Population**  
82.8 m



**Area**  
357,300 km<sup>2</sup>



**GDP per Inhabitant**  
38,100 EUR



**GDP Growth**  
1.9 per cent



**Unemployment**  
2.9 per cent



**CPI for Food**  
(2015=100)  
101.0

# GERMANY

Production of fruit and vegetables in Germany is limited to a certain extent by climate. Although some new greenhouses have been built in recent years, the country continues to rely heavily on imported produce. Where vegetables are grown, they tend to be the classic field products such as carrots, onions or cabbage, plus of course asparagus (mainly white) remains a special feature of Germany's vegetable industry, with almost a quarter of total outdoor vegetable production area dedicated to the crop. Despite a short season of only around three months, and relatively low yields, asparagus makes up a good 3 per cent of the country's vegetable output. In total, around 3.5m tonnes of vegetables are harvested outdoors in Germany, equal to just under 6 per cent of European production. For asparagus, howev-

er, the country's share is 40 per cent, making it by far the most important producer in Europe and among the leaders worldwide. Germany does still import a significant amount of fresh asparagus, but the marketing window has become smaller and smaller in recent years.

Fruit production in Germany amounts to around 1.3m tonnes in a normal year. However, 2017 was an exceptional year. Massive frosts in April hit the fruit blossom at a delicate stage and nearly halved the apple harvest, which makes up about 75 per cent of the country's entire fruit harvest. In volume terms, strawberries are Germany's second most-important fruit – in recent years, open-field cultivation has been reduced and protected production increased to safeguard supply – with plums, pears and cherries following in terms of importance. Germany's berry production is growing, but recent growth in the category has been driven mainly by imports. Only blueberry production shows a clear upward trend.

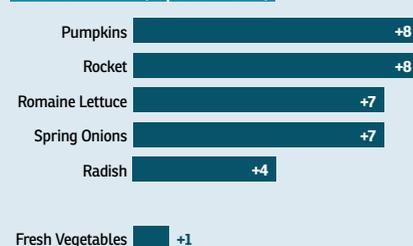
Germany relies heavily on fresh fruit and vegetable imports. All exotic fruits, citrus, melons and grapes, as well as large volumes of stonefruit, have to be imported. Vegetable imports consist predominantly of vegetables like tomatoes, peppers and aubergines, but outside the German growing season a large range of salads and other outdoor vegetables are imported. Germany is about 38 per cent self-sufficient on vegetables, but only about 15 per cent on fruits. Both fruit and vegetable imports were at a record high in 2016. While fresh vegetables come mainly from Spain and the Netherlands, fresh fruit comes from a wide variety of origins. Some products are also exported, but the trade balance is definitely negative in both cases.

More than half of all fresh fruit and vegetables are bought in discount stores in Germany. Traditional outlets such as greengrocers, street markets and producers account for only 10 per cent of the purchased volume. For some products like asparagus or strawberries, however, direct sales from producers are very important.



## TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2007-2016)



## TOP 8 FRUIT AND VEGETABLES 2016

HOUSEHOLD PURCHASES (kg)



## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT <sup>1)</sup>	2014	2015	2016	2017p
Apples	1,116	974	1,033	564
Strawberries	169	173	143	107
Pears	45	43	35	23
Plums	56	47	38	20
Sweet Cherries	40	31	29	17
Currants	13	14	14	13
Blueberries	12	12	11	10
Sour Cherries	17	17	16	9
Mirabelle Plums	7	5	4	3
Other	11	12	11	9
<b>TOTAL</b>	<b>1,485</b>	<b>1,327</b>	<b>1,334</b>	<b>775</b>

FRESH VEGETABLES <sup>2) 3)</sup>	2014	2015	2016	2017p
Carrots	609	527	642	650
Onions	500	455	523	503
White Cabbage	478	404	431	490
Gerkins	198	190	207	200
Red Cabbage	148	107	119	150
Asparagus	114	114	120	128
Iceberg Lettuce	130	130	121	115
Cauliflower	121	105	93	100
Spring Onions	89	98	94	95
Other	1,154	1,114	1,166	1,119
<b>TOTAL</b>	<b>3,541</b>	<b>3,245</b>	<b>3,516</b>	<b>3,550</b>

1) Including open field and protected production. 2) Excluding potatoes. 3) Only open field production.

Sources: AMI-informiert.de; Eurostat; Stat. Bundesamt

## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	1,396	1,399	1,403	1,417
Apples	551	549	520	489
Oranges	420	487	490	451
Watermelons	318	368	401	397
Table Grapes	314	338	330	320
Easy Peeler	383	392	401	353
Nectarines	178	187	172	182
Pineapples	168	144	170	149
Pears	169	168	169	153
Other	1,177	1,301	1,332	1,368
<b>TOTAL</b>	<b>5,074</b>	<b>5,332</b>	<b>5,387</b>	<b>5,279</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	745	757	743	691
Cucumbers/Gherkins	515	520	467	463
Pepper	382	398	392	380
Carrots	227	265	254	216
Onions	246	235	248	193
Lettuce	320	327	317	298
Courgettes	81	79	89	87
Mushrooms	83	91	97	93
Cauliflower	74	74	65	82
Other	526	569	621	592
<b>TOTAL</b>	<b>3,198</b>	<b>3,316</b>	<b>3,292</b>	<b>3,095</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	378	381	358	333
Apples	72	111	82	105
Oranges	30	36	32	27
Table Grapes	29	29	28	33
Other	215	223	215	195
<b>TOTAL</b>	<b>724</b>	<b>781</b>	<b>715</b>	<b>694</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Onions	79	101	87	78
Lettuce	42	48	40	42
White Cabbage	64	75	39	40
Cucumbers/Gherkins	40	48	39	26
Other	233	223	223	173
<b>TOTAL</b>	<b>457</b>	<b>494</b>	<b>427</b>	<b>359</b>

## TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	4,709	5,303	5,695	5,638
Export	705	801	797	773
<b>TRADE BALANCE</b>	<b>-4,004</b>	<b>-4,502</b>	<b>-4,898</b>	<b>-4,865</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	3,703	4,188	4,301	4,430
Export	350	394	364	339
<b>TRADE BALANCE</b>	<b>-3,353</b>	<b>-3,794</b>	<b>-3,937</b>	<b>-4,091</b>



**Population**  
60.6 m



**Area**  
302,100 km<sup>2</sup>



**GDP per Inhabitant**  
27,700 EUR



**GDP Growth**  
0.9 per cent



**Unemployment**  
6.6 per cent



**CPI for Food**  
(2015=100)  
100.2

# ITALY

Italy, alongside Spain, is a very important producer and exporter of fresh fruit and vegetables in Europe. With a highly diverse climate stretching along the Italian Peninsula, the country has a wide product range: in addition to traditional fruits grown in temperate zones – apples and pears, for example – Italy is known as a key producer of stonefruit, citrus and exotics such as figs and kiwifruit. In several fruit and vegetable categories – pears, nectarines, apricots, kiwifruit, table grapes, tomatoes and aubergines – Italy is in fact Europe's largest producer. In recent years, the country produced up to 9m tonnes of fruit and around 8m tonnes of vegetables. One third of the fruit and 10 per cent of the vegetables are exported each year, heading mainly to Germany, France and Austria. Around 17 per cent goes to countries outside the EU.

## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Apples	2,456	2,280	2,272	1,757
Oranges	1,669	1,668	1,495	1,714
Table Grapes	999	813	981	933
Peaches <sup>2)</sup>	617	673	606	674
Melons	560	584	632	646
Pears	736	764	681	719
Easy Peelers	617	752	649	734
Kiwifruit	475	575	452	390
Nectarines	765	736	657	689
Others	1,476	1,602	1,630	1,754
<b>TOTAL</b>	<b>10,369</b>	<b>10,448</b>	<b>10,056</b>	<b>10,009</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Tomatoes <sup>2)</sup>	989	1,045	979	993
Courgettes	540	494	554	552
Fennel	504	524	505	517
Carrots	539	513	531	510
Cucumbers	453	538	513	519
Lettuce	487	477	475	466
Onions	425	372	451	435
Artichokes	451	349	366	388
Cauliflower/Broccoli	405	400	388	356
Aubergines	309	300	318	325
Others	2,250	2,256	2,260	2,210
<b>TOTAL</b>	<b>7,352</b>	<b>7,268</b>	<b>7,339</b>	<b>7,270</b>

1) Excluding potatoes. 2) Excluding products grown for processing.

Sources: AMI-informiert.de; CSO; Eurostat; ISTAT

On the other hand, Italy is also an important fruit and vegetable importer. Fruit imports are predominantly tropical products such as bananas, pineapples or citrus, supplied mainly by Costa Rica, Spain and Colombia. Despite its large domestic production, Italy also imports a lot of tomatoes, as well as salad vegetables and potatoes. France, Spain and Germany dominate in this area.

In the last ten years, the importance of domestic berry production has increased. Some of these berries are also grown for export. As a result, relative growth in blackberry and blueberry exports is very high compared with other products, even if the volumes themselves remain modest.

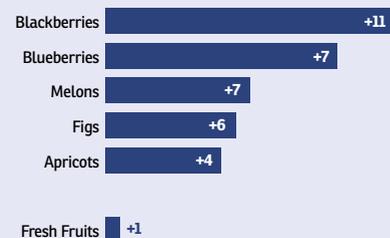
Processing plays an important role in Italy's vegetable business, especially for tomatoes. The country is the third-largest tomato processor worldwide; in addition to its sizeable fresh market, it produced another 5.5m tonnes of the product for processing in 2016.

Having reached their lowest level in 2013, purchases of fruit and vegetable in Italy have apparently increased year by year, and this trend was expected to continue in 2017 – by the end of October 2017, fruit and vegetable sales were around 3 per cent higher than in the previous year. In 2016, each household purchased an average of 179kg of fruit worth €285 and 144kg of vegetables worth €250. Apples, oranges and bananas are the three most commonly purchased fruits; tomatoes, salads and courgettes are the top three in vegetables. In recent years, supermarkets and discounters have gained increasing importance: 62 per cent of fresh fruit and vegetables were bought in supermarkets in Italy in 2016, up from 51 per cent in 2007. Compared with Germany, discounters play a minor role with a share of 14 per cent, and traditional shopping centres such as farmer's markets (13 per cent) and greengrocers (21 per cent) remain more important. In southern regions and on the islands, the importance of these outlets is especially high.



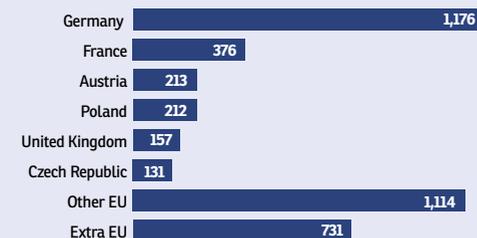
## TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2007-2016)



## FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2016)



## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	691	679	712	750
Pineapples	159	139	141	170
Oranges	161	217	137	240
Lemons	91	115	104	115
Others	678	752	722	685
<b>TOTAL</b>	<b>1,780</b>	<b>1,902</b>	<b>1,816</b>	<b>1,960</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Tomatoes <sup>2)</sup>	119	144	118	110
Lettuce	102	105	104	110
Onions	65	64	81	50
Others	304	334	300	310
<b>TOTAL</b>	<b>590</b>	<b>647</b>	<b>603</b>	<b>580</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Apples	944	1,104	1,010	945
Table Grapes	445	462	474	400
Kiwifruit	340	349	413	300
Oranges	121	120	152	150
Peaches/Nectarines	262	269	253	195
Pears	171	148	150	150
Easy Peelers	87	79	88	100
Plums	61	47	59	40
Lemons	45	41	46	45
Others	348	334	416	525
<b>TOTAL</b>	<b>2,824</b>	<b>2,952</b>	<b>3,060</b>	<b>2,850</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Lettuce	180	184	196	175
Tomatoes	116	103	105	65
Carrots	71	74	98	75
Cauliflower/Broccoli	64	67	89	80
Kohlrabi/Kale	58	54	65	65
Fennel	54	57	62	45
Beetroot	56	54	60	60
Onions	38	41	45	40
Courgettes	32	29	34	25
Others	151	150	170	160
<b>TOTAL</b>	<b>819</b>	<b>813</b>	<b>923</b>	<b>790</b>

## TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	1,420	1,659	1,625	1,780
Export	2,550	2,808	2,898	2,970
<b>TRADE BALANCE</b>	<b>1,130</b>	<b>1,149</b>	<b>1,273</b>	<b>1,190</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	553	671	612	612
Export	1,043	1,148	1,217	1,213
<b>TRADE BALANCE</b>	<b>490</b>	<b>477</b>	<b>605</b>	<b>601</b>



**Population**  
17.1 m



**Area**  
41,500 km<sup>2</sup>



**GDP per Inhabitant**  
41,300 EUR



**GDP Growth**  
2.2 per cent



**Unemployment**  
4.2 per cent



**CPI for Food**  
(2015=100)  
100.8

# NETHERLANDS

The Netherlands might be among the EU's smaller countries, but its long coastline on the North Sea mean it punches above its weight as an important trading hub for fruit imports and exports. Its production might be relatively modest, but it exported a huge amount of fresh fruit in 2016, second only to Spain among EU countries. At the same time, a lot of fruit reaches Europe from overseas via Dutch ports. Bananas are the leading fruit import in volume terms, as well as the most important fruit export. Oranges, table grapes, pineapples and avocados make up the top five imports, while the other leading exports are pears, pineapples, table grapes and oranges.

Less than 10 per cent of all Dutch fruit exports are produced in the country itself. Around 85 per cent of domestic production is pears and apples, and like many other European countries the Netherlands saw its

output limited in 2017. Open-field production of strawberries has diminished slightly in recent years, while protected crop volumes have grown. The country's main fruit exports are pears, apples and strawberries, but with a rather limited export basket the trade balance for fresh fruit is negative. However, with export values becoming stronger, this negative balance is shrinking year by year.

The situation in the Dutch vegetable market is different. With imports limited and production and exports of fresh vegetables high, the trade balance is obviously positive. Onions are the largest in terms of production and export volumes (the Netherlands is the second-largest exporter worldwide), with both cultivated area and export sales showing an upward trend. According to preliminary official estimates, planted area for onions increased by 4 per cent in 2017, reaching a record of nearly 35,000ha. Export destinations are widespread, with a focus on Senegal and other African countries.

In addition to its huge onion production, the Netherlands is an important producer of glasshouse vegetables. This industry is dominated by tomatoes, production of which has been stable recently with a tendency towards more Roma-type varieties on the vine and snack tomatoes. Artificial light is gaining importance when it comes to growing premium tomatoes in winter. Planted area for cucumbers has decreased in the last few years, but there is a growing trend in the production of sweet peppers.

Germany is the main export destination for Dutch vegetables – about 45 per cent of all tomato exports went to Germany in 2016 – followed by the UK. For cucumbers, Germany has an even stronger share of 62 per cent. Traditionally, cabbage and carrots were important Dutch exports, normally heading for Germany and eastern Europe. But with increasing production in those countries and greater investment in storage capacity, these export trades are becoming more limited.



## PRODUCTION

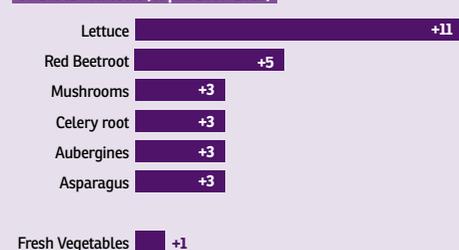
VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Pears	349	349	374	326
Apples	353	336	317	234
Strawberries	54	58	58	52
Other Berries	15	17	18	18
Other	21	20	19	15
<b>TOTAL</b>	<b>792</b>	<b>780</b>	<b>786</b>	<b>645</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Onions	1,379	1,504	1,449	1,600
Tomatoes	900	890	900	900
Carrots	555	563	601	550
Cucumbers	440	405	370	360
Peppers	340	360	365	380
Mushrooms	310	310	300	300
White Cabbage	145	142	129	145
Iceberg Lettuce	76	90	89	85
Leeks	91	86	82	85
Celery	74	71	75	85
Aubergines	51	53	54	54
Chicory	51	52	49	50
Brussel Sprouts	60	60	47	48
Spinach	38	47	45	55
Other	674	706	677	688
<b>TOTAL</b>	<b>4,910</b>	<b>5,057</b>	<b>4,962</b>	<b>5,385</b>

## TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2007-2016)



## FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2016)



## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT <sup>2)</sup>	2014	2015	2016	2017p
Bananas	452	677	773	850
Oranges	476	522	548	520
Table Grapes	351	353	340	370
Pineapples	340	267	282	280
Avocados	169	187	242	255
Apples	268	236	213	230
Other	1,525	1,674	1,757	1,945
<b>TOTAL</b>	<b>3,581</b>	<b>3,916</b>	<b>4,155</b>	<b>4,450</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	179	183	176	190
Onions	134	132	120	170
Cucumbers	95	85	95	98
Peppers	90	91	74	85
Other	595	496	482	557
<b>TOTAL</b>	<b>1,093</b>	<b>987</b>	<b>947</b>	<b>1,100</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT <sup>2)</sup>	2014	2015	2016	2017p
in Total <sup>1)</sup>	2,617	2,920	3,198	3,550
Dutch origin only				
Pears	216	173	186	175
Apples	68	68	56	50
Strawberries	31	32	30	27
Other	3	4	1	3
<b>TOTAL</b>	<b>318</b>	<b>277</b>	<b>273</b>	<b>255</b>

FRESH VEGETABLES	2014	2015	2016	2017p
in Total <sup>1)</sup>	4,322	4,378	4,198	4,600
Dutch origin only				
Onions	964	1,066	1,051	1,400
Tomatoes	808	777	754	745
Peppers	299	307	306	315
Cucumbers	342	295	254	285
Cabbage	125	115	99	95
Carrots	66	66	52	65
Other	231	227	224	195
<b>TOTAL</b>	<b>2,835</b>	<b>2,853</b>	<b>2,740</b>	<b>3,100</b>

## TRADE BALANCE

VALUE (million euros)

FRESH FRUITS <sup>2)</sup>	2014	2015	2016	2017p
Import	3,861	4,368	4,831	5,330
Export <sup>1)</sup>	3,410	4,119	4,635	5,160
<b>TRADE BALANCE</b>	<b>-451</b>	<b>-249</b>	<b>-196</b>	<b>-170</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	1,069	1,194	1,214	1,450
Export <sup>1)</sup>	3,963	4,538	4,603	5,000
<b>TRADE BALANCE</b>	<b>2,894</b>	<b>3,344</b>	<b>3,389</b>	<b>3,550</b>

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

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



**Population**  
38.0 m



**Area**  
312,700 km<sup>2</sup>



**GDP per Inhabitant**  
11,100 EUR



**GDP Growth**  
2.9 per cent



**Unemployment**  
3.8 per cent



**CPI for Food**  
(2015=100)  
101.1

# POLAND

Every fourth apple produced in the EU comes from Poland, a statistic that puts it ahead of Italy and France as Europe's top apple-producing country. It also occupies a leading position for other fruit and vegetable crops like sour cherries, carrots and cabbage, and just outranks the Netherlands on mushrooms. But processing plays a major role in Poland's fruit and vegetable sector, as does the notable wild production of items like Chanterelle mushrooms and blueberries.

Apples account for 78 per cent of total Polish fruit production, with the largest concentration of orchards found in Grójec, around 40km south of Warsaw. Its main varieties are Idared, Champion, Golden Delicious and Gala. Until Russia banned EU fruit imports in 2014, it was traditionally the main consumer of Polish apples, taking

half of its neighbour's exports. With the market's closure, the flow of exports changed dramatically, for example bringing Arab countries suddenly into focus. In 2017/18 however, given the small EU harvest, it will probably be possible to sell more Polish apples in Europe.

For vegetables, Poland's output is very much focused on cabbage, carrots, onions and beetroot, vegetables that are very often used in traditional eastern European cuisine. In terms of exports, however, mushrooms are number one: most are exported to Western Europe, including speciality items like oyster mushrooms and shiitake. For cabbage, on the other hand, the main destinations are countries in south-east and eastern Europe, often those with historical connections to Poland. While Poland is a net importer of fruit, for vegetables it is a net exporter. Fruit imports consist mainly of items that cannot be grown in Poland, such as bananas, citrus and exotic fruits.

Behind Belgium, Poland is the second-largest producer of frozen vegetables in Europe. According to the Institute of Agricultural and Food Economics, its production amounted to 660,000 tonnes in 2016, just over half of all processed vegetables. The canned vegetable and tomato processing industries are also important. For fruit, one of Poland's strengths is the production of juice, nectar and fruit juice drinks. Poland is also the world's leading producer of blackcurrants, which are also used for juice.

Another mainstay is the production of frozen fruit and juice concentrate. In these two cases, Poland occupies a leading position in Europe. Apples especially are used to make juice and concentrate. For frozen fruit, strawberries, sour cherries and raspberries are the biggest items.



## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT <sup>2)</sup>	2014	2015	2016	2017p
Apples	3,195	3,146	3,604	2,600
Strawberries	203	205	197	178
Currants	163	154	166	130
Raspberries	126	78	129	110
Sour Cherries	177	174	195	70
Pears	74	66	82	60
Plums	106	91	110	60
Aronia	43	43	49	40
Sweet Cherries	48	46	54	20
Other	53	46	58	47
<b>TOTAL</b>	<b>4,188</b>	<b>4,049</b>	<b>4,644</b>	<b>3,315</b>

FRESH VEGETABLES <sup>3)</sup>	2014	2015	2016	2017p
Cabbage	1,156	875	1,018	1,000
Tomatoes	811	790	867	870
Carrots	823	678	822	827
Onions	651	548	651	667
Cucumbers	532	487	538	515
Beetroot	358	297	341	336
Mushrooms	310	315	320	325
Cauliflower	246	195	240	238
Other	1,030	925	1,133	1,012
<b>TOTAL</b>	<b>5,917</b>	<b>5,110</b>	<b>5,930</b>	<b>5,790</b>

1) Including re-export. 2) Including fruits for processing. 3) Excluding potatoes, open-field and under glass. 4) Including vegetable juice and nectar.

Sources: AMI-informiert.de; Eurostat; GUS; IERIGZ

## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	330	380	370	380
Oranges	173	170	162	163
Easy Peelers	159	163	160	154
Watermelons	120	123	131	123
Table Grapes	120	114	108	105
Other	498	509	504	475
<b>TOTAL</b>	<b>1,400</b>	<b>1,459</b>	<b>1,435</b>	<b>1,400</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	148	144	142	132
Onions	101	73	60	66
Cucumbers	47	56	53	54
Peppers	54	53	52	53
Other	191	212	227	229
<b>TOTAL</b>	<b>541</b>	<b>538</b>	<b>534</b>	<b>534</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Apples	1,096	946	1,093	900
Pears	37	29	50	42
Raspberries	18	18	17	15
Strawberries	19	17	15	13
Plums	13	7	9	6
Sour Cherries	8	13	9	4
Sweet Cherries	4	6	7	3
Other <sup>1)</sup>	175	140	159	167
<b>TOTAL</b>	<b>1,370</b>	<b>1,176</b>	<b>1,359</b>	<b>1,150</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Mushrooms	208	212	221	225
Onions	125	122	117	118
Tomatoes	99	98	95	97
Cabbage	75	65	36	50
Carrots	42	31	23	31
Cauliflower	31	28	28	28
Peppers	17	15	20	21
Other	137	110	139	145
<b>TOTAL</b>	<b>734</b>	<b>681</b>	<b>679</b>	<b>715</b>

## TRADE BALANCE

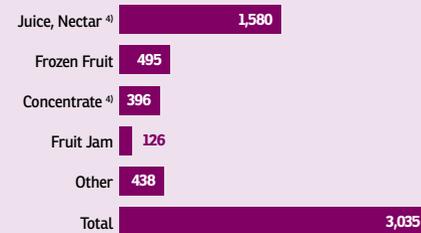
VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	1,110	1,217	1,245	1,215
Export	613	567	583	545
<b>TRADE BALANCE</b>	<b>-497</b>	<b>-650</b>	<b>-662</b>	<b>-670</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	447	488	501	545
Export	559	568	574	590
<b>TRADE BALANCE</b>	<b>112</b>	<b>80</b>	<b>73</b>	<b>45</b>

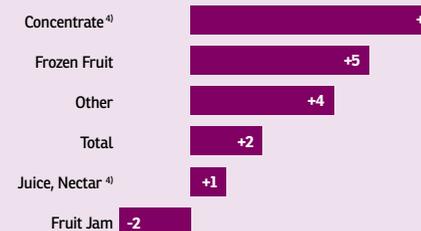
## PROCESSED FRUIT PRODUCTION

('000 tonnes, 2016)



## PROCESSED FRUIT PRODUCTION

VOLUME GROWTH (% p.a. 2007-2016)





**Population**  
21.2 m



**Area**  
819,900 km<sup>2</sup>



**GDP per Inhabitant**  
44,800 EUR



**GDP Growth**  
2.4 per cent



**Unemployment**  
5.0 per cent



**CPI for Food**  
(2015=100)  
100.3

# NORDIC COUNTRIES

## DENMARK, FINLAND, SWEDEN

The climate in Sweden, Finland and Denmark precludes these countries from producing a lot of fruit and vegetables, so with their high consumer purchasing power they are particularly popular export destinations.

That's especially true in Finland, where the domestic growing season is short due to the cold winters. Although Sweden and Denmark benefit from the warming Gulf Stream in winter, their summer months are only moderately warm. Thus, the three Nordic countries produce a combined vegetable volume of under 950,000 tonnes, equal to only 1.5 per cent of total European production.

The region's most significant vegetable crops are carrots, onions and cabbage, all grown in open field, and tomatoes, which are the leading crop under greenhouse cultivation. Of the three countries, Sweden has

retained its position as the largest vegetable producer in recent years, but since 2012 Denmark's own vegetable production has shown an upward trend, mainly due to increased volumes of onions and carrots. In particular, it has been producing more snack and organic carrots for the European market.

At around 120,000 tonnes, the three Nordic countries' fruit production is much lower than their vegetable output. While apples and strawberries are the most important fruits produced, low domestic production means the countries rely heavily on imports and only export very small quantities of fruit, as is also the case for vegetables. Their self-sufficiency is only around 9 per cent for fruit, compared with around 62 per cent for vegetables. The foreign trade balance is very negative for both fruit and vegetables.

Overall, the trio imports about 660,000 tonnes of fresh vegetables per year, with a slight upward trend. The leading imports are tomatoes, salads and cucumbers, with volumes offset by exports of around 90,000 tonnes. Sweden imports the largest volume and has the highest domestic consumption of the three. However, it also has the largest population. Its per-capita vegetable consumption is around 50kg, compared with 70kg in Finland and 78kg in Denmark. The latter is the leading exporter of vegetables, with carrots accounting for more than half of the export volume. In recent years, carrot exports have risen sharply.

With a total of around 1.39m tonnes, fruit imports are significantly higher than vegetable imports. By far the biggest imported product are bananas, followed by apples for the fresh market and oranges. In the long term, white currants, raspberries and blackberries are among the most important imports, buoyed by growth in the Scandinavian berry market. Imports are offset by exports of just over 80,000 tonnes. Domestic per-capita fruit consumption is more similar across the three countries than it is for vegetables. In Sweden, it stands at around 70kg, in Denmark 68kg and in Finland almost 64kg.



### PRODUCTION

VOLUME ('000 tonnes)

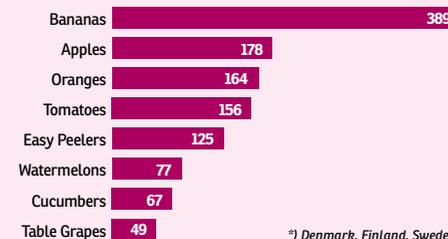
FRESH FRUIT	2014	2015	2016	2017p
<b>Denmark</b>	<b>55.2</b>	<b>67.6</b>	<b>54.5</b>	<b>50.0</b>
- Apples	28.3	28.5	23.0	19.0
- Strawberries <sup>2)</sup>	7.5	6.5	7.9	7.0
- Pears	7.5	7.8	5.5	5.0
<b>Finland</b>	<b>20.9</b>	<b>23.1</b>	<b>21.4</b>	<b>20.0</b>
- Strawberries <sup>2)</sup>	12.9	14.4	11.9	12.0
- Apples	5.2	6.0	6.4	5.5
<b>Sweden</b>	<b>44.4</b>	<b>45.6</b>	<b>45.2</b>	<b>42.0</b>
- Apples	24.6	25.4	26.8	24.0
- Strawberries <sup>2)</sup>	16.0	17.1	15.3	15.0
<b>TOTAL</b>	<b>120.5</b>	<b>136.2</b>	<b>121.1</b>	<b>112.0</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
<b>Denmark</b>	<b>297.2</b>	<b>316.2</b>	<b>315.0</b>	<b>330.7</b>
- Carrots	107.3	102.5	117.6	125.0
- Onions	51.9	54.7	62.0	68.0
- White Cabbage	26.3	22.4	23.0	23.0
<b>Finland</b>	<b>268.6</b>	<b>250.1</b>	<b>262.5</b>	<b>265.0</b>
- Carrots	74.4	63.9	73.0	74.0
- Tomatoes	39.9	38.9	40.6	42.0
<b>Sweden</b>	<b>377.7</b>	<b>380.6</b>	<b>372.4</b>	<b>380.0</b>
- Carrots	119.0	115.6	111.6	111.4
- Onions	53.3	64.6	59.4	63.0
<b>TOTAL</b>	<b>943.6</b>	<b>947.0</b>	<b>949.8</b>	<b>975.7</b>

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

### FRUIT AND VEGETABLE IMPORTS 2016

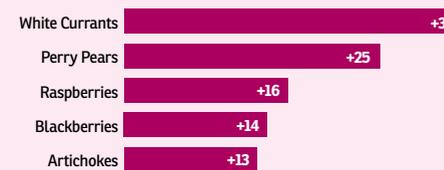
BY NORDIC COUNTRIES<sup>\*)</sup> ('000 tonnes)



\*) Denmark, Finland, Sweden.

### TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH<sup>\*)</sup> (% p.a. 2007-2016)



Fresh Fruits and Vegetables +1

\*) Denmark, Finland, Sweden.

### IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
<b>Denmark</b>	<b>372.0</b>	<b>379.6</b>	<b>369.4</b>	<b>365.7</b>
- Bananas	88.5	87.6	80.4	82.8
- Apples	52.3	56.8	49.5	48.5
- Oranges	38.8	42.5	42.7	36.0
<b>Finland</b>	<b>289.4</b>	<b>314.4</b>	<b>328.4</b>	<b>327.8</b>
- Bananas	85.7	101.9	110.5	113.3
- Apples	45.6	47.3	44.4	44.8
<b>Sweden</b>	<b>670.2</b>	<b>686.8</b>	<b>691.1</b>	<b>691.0</b>
- Bananas	199.2	208.8	201.9	206.0
- Oranges	86.9	92.7	92.2	87.6
<b>TOTAL</b>	<b>1,331.6</b>	<b>1,380.9</b>	<b>1,389.0</b>	<b>1,384.5</b>

FRESH VEGETABLES	2014	2015	2016	2017p
<b>Denmark</b>	<b>189.2</b>	<b>199.2</b>	<b>187.4</b>	<b>188.0</b>
- Tomatoes	34.3	36.1	35.4	33.3
- Lettuce	25.9	27.7	23.0	23.1
- Cucumbers	22.4	21.9	21.6	21.4
<b>Finland</b>	<b>122.8</b>	<b>122.3</b>	<b>126.6</b>	<b>124.1</b>
- Tomatoes	29.4	28.1	27.0	25.1
- Lettuce	24.3	23.9	25.8	26.1
<b>Sweden</b>	<b>339.7</b>	<b>342.4</b>	<b>351.2</b>	<b>348.0</b>
- Tomatoes	91.0	89.6	93.1	82.0
- Cucumbers	33.9	35.0	37.0	38.0
<b>TOTAL</b>	<b>651.7</b>	<b>664.0</b>	<b>665.2</b>	<b>660.1</b>

### EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
<b>Denmark</b>	<b>27.4</b>	<b>33.5</b>	<b>35.3</b>	<b>36.6</b>
- Bananas	6.9	8.6	7.5	9.4
- Apples	3.8	4.0	4.8	4.2
<b>Finland</b>	<b>0.9</b>	<b>0.3</b>	<b>0.2</b>	<b>0.8</b>
<b>Sweden</b>	<b>44.0</b>	<b>48.8</b>	<b>45.2</b>	<b>47.0</b>
<b>TOTAL</b>	<b>72.3</b>	<b>82.7</b>	<b>80.7</b>	<b>84.4</b>

FRESH VEGETABLES	2014	2015	2016	2017p
<b>Denmark</b>	<b>50.2</b>	<b>60.0</b>	<b>58.4</b>	<b>59.6</b>
- Carrots	19.0	29.1	30.3	39.4
- Onions	12.8	12.0	11.6	5.7
<b>Finland</b>	<b>2.4</b>	<b>4.3</b>	<b>10.1</b>	<b>10.5</b>
<b>Sweden</b>	<b>16.1</b>	<b>15.4</b>	<b>21.9</b>	<b>19.7</b>
<b>TOTAL</b>	<b>68.8</b>	<b>79.7</b>	<b>90.4</b>	<b>89.8</b>

### TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	1,315	1,484	1,526	1,560
Export	86	111	118	120
<b>TRADE BALANCE</b>	<b>-1,229</b>	<b>-1,373</b>	<b>-1,409</b>	<b>-1,440</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	888	961	981	1,044
Export	77	89	95	117
<b>TRADE BALANCE</b>	<b>-812</b>	<b>-873</b>	<b>-885</b>	<b>-927</b>



**Population**  
46.5 m



**Area**  
506,000 km<sup>2</sup>



**GDP per Inhabitant**  
24,100 EUR



**GDP Growth**  
3.3 per cent



**Unemployment**  
12.8 per cent



**CPI for Food**  
(2015=100)  
101.4

## SPAIN

Spain is by far the largest producer of fruit and vegetables in Europe, something which holds especially true when it comes to the fresh market. With a broad range of climates, Spain produces temperate fruit, citrus and even some tropical fruit. Its export-oriented production is concentrated in the eastern and southern parts of the country bordering the Mediterranean Sea. While apples and pears are produced mainly in Catalonia and Aragon, citrus is still mainly produced in the regions of Valencia and Murcia, even if Andalusia is gaining importance in that category. Huelva on the Atlantic coast is the centre of Spanish berry production, while various regions cultivate stonefruit. Export-focused vegetable production is concentrated in Murcia (open field) and Almería (protected crops).

### PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Oranges	3,484	3,087	3,635	3,170
Easy Peelers	2,390	1,992	2,315	1,803
Watermelons	918	1,040	1,075	1,120
Lemons	1,089	776	979	906
Peaches <sup>1)</sup>	557	566	570	623
Melons	720	692	685	611
Nectarines	544	556	535	585
Apples	505	482	495	474
Strawberries	370	399	370	361
Other	2,764	3,306	2,977	3,778
<b>TOTAL</b>	<b>13,341</b>	<b>12,896</b>	<b>13,636</b>	<b>13,431</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes <sup>1)</sup>	2,360	2,125	2,353	2,200
Onions	1,347	1,241	1,344	1,370
Peppers <sup>1)</sup>	1,070	1,040	1,090	1,158
Lettuce	941	927	925	941
Cucumbers	779	705	720	612
Courgettes	465	543	574	596
Broccoli	446	452	497	460
Carrots	377	411	401	398
Green Beans	187	180	172	165
Other	2,359	2,290	2,338	1,765
<b>TOTAL</b>	<b>10,331</b>	<b>9,914</b>	<b>10,414</b>	<b>9,665</b>

<sup>1)</sup> Excluding products grown for processing.

Sources: AMI-informiert.de; DGA; Eurostat; Fepex; Mapama

Spain is also Europe's leading exporter of fresh fruit and vegetables, as well as one of its most dynamic. In the last decade, its fruit and vegetable exports grew by an annual average of 4 per cent, with vegetables slightly outperforming fruit. Growth rates were especially high for berries, watermelons and kiwifruit. Persimmons, known locally as kaki, were also a great success, but figures are only available for the last five years. Spain also performed well exporting stonefruit: its success with peaches was mainly due to growing exports of flat varieties, which have gained a significant market share in central Europe.

The highest relative growth rates in vegetable exports are found in some minor items like spinach or leeks, but the highest absolute growth rates can be observed in fruit vegetables like peppers, cucumbers and courgettes. Brassica exports were mainly broccoli, while iceberg lettuce is still the most exported salad vegetable crop; growth in this category was due to the success of other articles like baby leaf or romaine hearts.

Spanish exports go mostly to other EU countries, with only 6 per cent sent to third countries. Germany (26 per cent) is the most important destination, followed by France (18 per cent), the UK (12 per cent) and the Netherlands (8 per cent). Produce exported to the Netherlands is often re-exported.

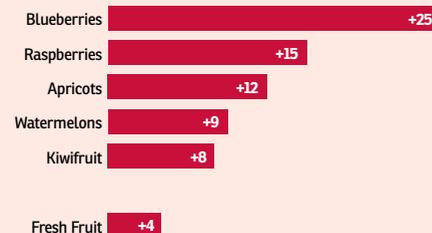
Spanish imports, meanwhile, are growing but still of limited importance compared with exports. The country's fresh produce trade surplus seems to be increasing from year to year.

Offering high per-capita consumption, the domestic market is also an interesting destination for Spanish producers. Compared with Germany, private households in Spain buy double the quantity of fresh fruit and vegetables. Only 50 per cent of consumer expenditure on fresh fruit and vegetables is spent in supermarkets or discounts. The big supermarkets (hipermercados, 8 per cent) and discount chains (10 per cent) still play a limited role and their market share has not increased much in the last five years. Smaller Supermarkets (31 per cent) remain important, but about 25 per cent of the budget for fresh fruit and vegetables is still spent at traditional shops, mainly greengrocers. These outlets are more important for fresh fruit than for fresh vegetables.



### TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2007-2016)



### FRUIT AND VEGETABLE EXPORTS 2016

BY DESTINATION ('000 tonnes)



### IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	259	228	285	300
Apples	202	203	223	200
Kiwifruit	126	148	162	200
Oranges	111	133	164	150
Other	660	681	779	770
<b>TOTAL</b>	<b>1,358</b>	<b>1,393</b>	<b>1,613</b>	<b>1,620</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Beans	126	109	138	140
Tomatoes <sup>1)</sup>	54	85	92	100
Onions	45	41	71	50
Other	197	197	203	210
<b>TOTAL</b>	<b>422</b>	<b>432</b>	<b>504</b>	<b>500</b>

### EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Oranges	1,657	1,891	1,556	1,640
Easy Peelers	1,594	1,566	1,464	1,450
Lemons	644	639	545	680
Watermelons	558	655	719	740
Strawberries	295	283	311	300
Melons	404	435	444	460
Peaches	373	379	407	470
Nectarines	470	470	419	480
Kaki	143	185	193	200
Other	1,085	1,081	1,141	1,140
<b>TOTAL</b>	<b>7,223</b>	<b>7,584</b>	<b>7,199</b>	<b>7,560</b>

FRESH VEGETABLES <sup>1)</sup>	2014	2015	2016	2017p
Tomatoes	968	950	908	870
Peppers	869	672	701	720
Lettuce	720	724	743	750
Cucumbers	595	625	632	630
Brassicas	445	450	464	450
Onions	353	354	357	370
Courgettes	294	276	327	320
Garlic	125	149	163	165
Aubergines	143	159	153	140
Other	525	560	603	635
<b>TOTAL</b>	<b>5,037</b>	<b>4,919</b>	<b>5,051</b>	<b>5,050</b>

### TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	1,182	1,336	1,576	1,600
Export	6,311	7,063	7,279	7,400
<b>TRADE BALANCE</b>	<b>5,129</b>	<b>5,727</b>	<b>5,703</b>	<b>5,800</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	544	635	737	800
Export	4,342	4,839	5,207	5,500
<b>TRADE BALANCE</b>	<b>3,798</b>	<b>4,204</b>	<b>4,470</b>	<b>4,700</b>



**Population**  
65.8 m



**Area**  
248,500 km<sup>2</sup>



**GDP per Inhabitant**  
36,500 EUR



**GDP Growth**  
1.9 per cent



**Unemployment**  
3.3 per cent



**CPI for Food**  
(2015=100)  
97.6

# UNITED KINGDOM

Domestic fruit and vegetable production in the UK is relative small, although it is the EU's eighth-largest producer of vegetables. After a low around 2005, its vegetable production area has recovered to around 131,000ha, of which 35,000ha are used to grow peas for processing. Protected veg production is insignificant, at just 850ha.

In terms of EU fruit production, the UK sits in twelfth place. Production of apples and pears appears small, with the notable point that the country grows a high proportion of 'culinary apples' (essentially Bramley), which are not consumed raw. The soft fruit sector, in the meantime, is developing very dynamically. Since 2000, its planted area has more than doubled, and for the most part is now essentially protected cultivation under

plastic tunnels. In the rainy summer climate, the quality of berries grown in open fields is too often unreliable and does not meet the high demands of British supermarkets. Overall growth in protected cultivation of fruit (140ha in 2006, 217ha in 2016) has outpaced vegetables (700ha in 2006, 730ha in 2016).

Due to its relatively small domestic production, the UK is one of the largest importers of fresh fruit and vegetable in Europe, ranking third in the EU for both fruits and vegetables. Two-thirds of its fresh vegetables come from Spain and the Netherlands, with only 12 per cent from third countries. By contrast, almost two-thirds of its fruit come from third countries – in addition to the traditional banana suppliers of south and central America, South Africa (9 per cent) plays a prominent role. The most important EU source is Spain (16 per cent). As imports have climbed year by year, the UK's self-sufficiency rate for fruit has fallen to 17 per cent, while for vegetables it is higher at 54 per cent.

The UK's fresh fruit and vegetable exports are minor, although in the past five years re-exports of items including bananas and oranges have risen.

In 2015, UK household spending on fresh fruit and vegetables was the second highest in the EU at €12.2bn, just behind Germany (€13.1bn). That figure was high primarily due to price – purchased volumes per household were only 10 per cent higher than in Germany, but expenditure per household exceeded the German figure by a third. This was not only due to higher prices of comparable items, but also to a higher proportion of more expensive products. The soft fruit sector alone accounts for 11 per cent of the UK's total spending on fresh fruit and vegetables.

A slight increase in purchased volumes can be attributed to higher demand for root vegetables, cabbage, bananas and soft fruit. Traditionally, quality requirements in the UK have been very high, with competition between individual supermarkets comparatively low. But this has changed somewhat over the past few years thanks to the increased presence of German discounters, even if that part of the market still has some way to go to catch up with the continent.



## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT <sup>1)</sup>	2014	2015	2016	2017p
Apples	175	183	183	137
Strawberries	104	115	118	125
Pears	25	25	27	25
Raspberries	18	17	15	15
Blackcurrants	13	15	11	11
Plums	12	11	9	9
Cherries	4	5	2	2
Other Soft Fruit	8	9	7	7
Other	4	4	5	4
<b>TOTAL</b>	<b>362</b>	<b>385</b>	<b>378</b>	<b>336</b>

FRESH VEGETABLES <sup>2)</sup>	2014	2015	2016	2017p
Carrots	755	731	723	725
Onions	374	394	372	370
Peas <sup>1)</sup>	212	235	246	245
Cabbage	231	230	231	230
Lettuce	124	122	93	120
Turnips and Swedes	97	104	88	90
Cauliflower	93	91	82	80
Parsnips	85	84	81	80
Celery	53	54	53	55
Brussel Sprouts	50	51	50	50
Other	383	375	315	350
<b>TOTAL</b>	<b>2,455</b>	<b>2,471</b>	<b>2,333</b>	<b>2,395</b>

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

## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	1,142	1,144	1,190	1,210
Oranges	531	539	550	540
Apples	435	400	366	560
Easy Peelers	298	302	316	300
Table Grapes	253	252	267	270
Melons	145	153	160	165
Pineapples	144	142	146	165
Pears	164	145	142	140
Watermelons	90	103	121	130
Other	586	677	741	780
<b>TOTAL</b>	<b>3,787</b>	<b>3,857</b>	<b>3,998</b>	<b>4,260</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	395	377	381	375
Onions	284	223	217	220
Lettuce, all	199	205	219	210
Peppers	169	164	189	175
Cucumbers	141	141	154	145
Cauliflower/Broccoli	138	129	136	125
Mushrooms	99	94	93	95
Celery	78	72	78	70
Other	432	458	522	455
<b>TOTAL</b>	<b>1,936</b>	<b>1,863</b>	<b>1,990</b>	<b>1,870</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	22	31	53	50
Oranges	28	28	28	30
Apples	14	16	13	14
Other	34	49	41	46
<b>TOTAL</b>	<b>93</b>	<b>116</b>	<b>129</b>	<b>140</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Carrots and Turnips	33	26	17	25
Salad Beetroot	17	18	20	20
Cauliflower/Broccoli	5	8	6	7
Other	45	71	88	78
<b>TOTAL</b>	<b>101</b>	<b>123</b>	<b>132</b>	<b>130</b>

## TRADE BALANCE

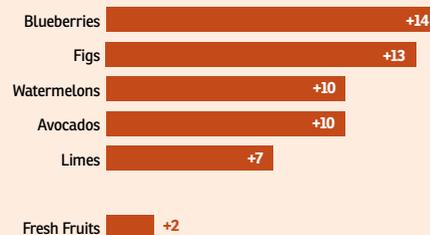
VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	3,512	4,133	4,327	4,360
Export	87	116	127	140
<b>TRADE BALANCE</b>	<b>-3,425</b>	<b>-4,017</b>	<b>-4,200</b>	<b>-4,220</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	2,285	2,512	2,534	2,460
Export	81	113	118	115
<b>TRADE BALANCE</b>	<b>-2,204</b>	<b>-2,400</b>	<b>-2,415</b>	<b>-2,345</b>

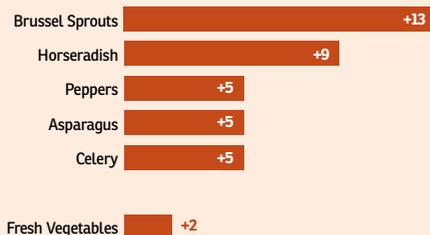
## TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2007-2016)



## TOP 5 FRESH VEGETABLE IMPORTS

VOLUME GROWTH (% p.a. 2007-2016)





**Population**  
10.8 m



**Area**  
132,000 km<sup>2</sup>



**GDP per Inhabitant**  
16,200 EUR



**GDP Growth**  
-0.2 per cent



**Unemployment**  
14.1 per cent



**CPI for Food**  
(2015=100)  
99.8

# SOUTHEAST EUROPE GREECE

Unlike other countries in south-east Europe, Greece has been an EU member for more than three decades, having joined in 1981 – five years before Spain and Portugal. Greece enjoys a special relationship with many countries in the surrounding region, partly because of the high direct investment of Greek companies in those neighbouring countries, and partly because of the region's importance as a market for Greek exports.

Greek vegetable production has declined at an annual rate of 3 per cent over the last decade, although this was mostly due to a decrease in tomato production for processing. Fresh market production has declined only slightly. Most of the fruit vegetables, like tomatoes, cucumbers, courgettes and peppers, are grown under protection. Crete is Greece's leading region for

greenhouse production, followed by the Peloponnese, Macedonia, Thessaly, Central Greece, Epirus and the Aegean Islands. A significant proportion of the greenhouse area used for vegetables is occupied by high tunnels. Other important open-field crops are onions and leafy vegetables.

Fruit production in Greece is comparatively more important. It has remained stable or even increased slightly after 2007. Citrus is the most important sector, but there is more focus on oranges compared with other Mediterranean suppliers, with only limited production of lemons and easy peelers. Melons in Greece are mainly watermelons, and are produced and consumed in huge amounts; they are also the most important export item, in volume terms. Stonefruit is another important category, production of which is situated mainly in Macedonia. While clingstone peach production for processing is fluctuating a lot and decreasing, production of peaches and apricots for the fresh market is stable and nectarine production is rising. All of the country's stonefruit products, including cherries, are exported in major quantities. That also holds true for grapes, where production has shifted to seedless varieties. Production of apples and pears, located mainly around the city of Vólos, is less important.

Greece was hit hard by Russia's ban on fruit imports, which previously took 10 per cent of its fruit exports and 3 per cent of vegetable exports in the year before the ban. But after a certain 'shock period', Greek exporters found new markets: Egypt, Turkey, Jordan and Saudi Arabia have more than doubled their fruit imports from Greece since 2013. Fruit exports to Romania, Bulgaria, Serbia, Macedonia and other countries in the region have also increased considerably.

Exports of fresh vegetables are increasingly directed at countries like Bulgaria, Romania and Italy, with shipments to Germany stable. The latter's demand for imported white asparagus has declined to such an extent that it has all but disappeared from German supermarket shelves, but Greek cucumbers have retained a stable market share in southern Germany.



## PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Oranges	859	881	917	900
Watermelons	572	547	536	500
Table Grapes	294	249	317	300
Peaches <sup>1)</sup>	230	162	175	286
Apples	245	242	259	232
Kiwifruit	172	199	180	200
Easy Peelers	140	158	146	150
Nectarines	83	82	87	104
Lemons	64	45	69	65
Other	750	746	661	633
<b>TOTAL</b>	<b>3,409</b>	<b>3,311</b>	<b>3,346</b>	<b>3,370</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes <sup>1)</sup>	575	567	531	540
Onions	204	229	217	220
Peppers	148	154	152	150
Cucumbers	165	147	127	125
Lettuce	63	90	75	75
Courgettes	63	76	65	65
Green Beans	60	73	69	65
Cauliflower, Broccoli	58	67	55	55
Carrots	44	36	35	35
Other	343	367	308	300
<b>TOTAL</b>	<b>1,723</b>	<b>1,807</b>	<b>1,635</b>	<b>1,630</b>

<sup>1)</sup> Excluding products grown for processing.

Sources: AMI-informiert.de; CSO; Europech; Eurostat; WAPA

## IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	138	139	151	147
Lemons	19	21	17	23
Apples	15	20	19	23
Pineapples	6	7	6	5
Other	40	41	38	30
<b>TOTAL</b>	<b>218</b>	<b>228</b>	<b>231</b>	<b>228</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes <sup>1)</sup>	9	12	18	17
Onions	14	10	11	11
Mushrooms	6	7	7	8
Other	29	47	29	36
<b>TOTAL</b>	<b>58</b>	<b>76</b>	<b>65</b>	<b>71</b>

## EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Watermelons	177	170	178	171
Peaches	106	84	100	116
Kiwifruit	102	101	132	114
Table Grapes	88	80	77	90
Apples	68	90	85	72
Nectarines	62	64	69	70
Oranges	32	25	40	38
Strawberries	34	20	23	25
Apricots	17	10	216	25
Cherries	18	25	16	15
Pears	4	5	5	7
Other	447	389	394	368
<b>TOTAL</b>	<b>1,155</b>	<b>1,063</b>	<b>1,335</b>	<b>1,110</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	39	36	41	34
Cucumbers	40	35	40	25
Peppers	10	10	12	8
Other	45	36	52	32
<b>TOTAL</b>	<b>134</b>	<b>116</b>	<b>145</b>	<b>99</b>

## TRADE BALANCE

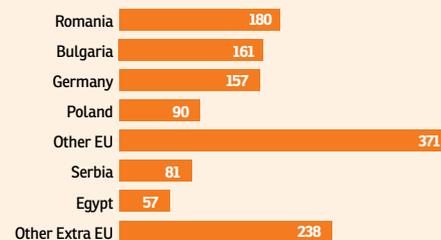
VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	154	174	175	200
Export	654	618	698	640
<b>TRADE BALANCE</b>	<b>500</b>	<b>444</b>	<b>523</b>	<b>440</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	48	66	62	68
Export	111	95	117	104
<b>TRADE BALANCE</b>	<b>63</b>	<b>29</b>	<b>55</b>	<b>36</b>

## FRESH FRUIT EXPORTS 2016

BY DESTINATION ('000 tonnes)



## FRESH VEGETABLE EXPORTS 2016

BY DESTINATION ('000 tonnes)





Population  
7.0 m



Area  
88,400 km<sup>2</sup>



GDP per  
Inhabitant  
4,900 EUR



GDP Growth  
2.8 per cent



Unemployment  
15.3 per cent



CPI for Food  
(2015=100)  
100.0

# SOUTHEAST EUROPE

## SERBIA

Serbia is the biggest producer of fruit and vegetables among the former Yugoslav countries. Despite being a major producer of vegetables, fresh vegetables have traditionally not been an important export product, but they do seem to be increasing a little faster than fresh vegetable imports, which are normally more or less in balance. Exports of frozen vegetables are also increasingly slightly, but this is of secondary importance compared with frozen fruit exports.

The country's fruit production amounts to approximately 1.4m tonnes in a normal year. Stonefruit and especially plums make up a large share of that production, as is true for neighbouring countries, with other important products being apples, melons, sour cherries and raspberries. South-east Europe is probably the only

region of the world where plum production exceeds apple production, and in Serbia much of that crop is used for processing.

Fresh fruit exports have risen by more than 60 per cent in the past five years, with apples commanding an increasing share of that expanding trade. Back in 2013, apples amounted to 51 per cent of all fruit exports, but in 2016 this was 63 per cent. Russia was always an important export destination, but has become even more important in that time. In 2016, 89 per cent of all Serbian apple exports went to Russia, compared with only 65 per cent three years earlier. In total, Russia takes just over three-quarters of the country's fresh fruit exports, which were among the few European countries not subject to import restrictions after August 2014. A temporary ban on exports from Turkey to Russia also helped Serbian exporters.

Plums are the second most-important export item. Unlike for apples, Russia's share of exports has decreased in recent years and amounted only to 35 per cent in 2016. Plum exports were rather volatile, depending on crops in Serbia and other European countries. Exports of fresh sour cherries or fresh raspberries are mainly used for processing – Germany is an important destination in this case.

More important than exports of fresh cherries and raspberries is the export of these products as frozen fruit. Serbia is a global market leader in the export of frozen raspberries and, together with Poland, is an important source of frozen sour cherries. Both are used mainly by processing companies in import markets to make products like fruit yoghurt, ice cream and jam. Only 10-15 per cent sold in consumer packs. Germany is the most important destination, followed by France and Belgium. Russia is of lesser importance when it comes to frozen fruit exports.



### PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Plums	401	344	463	331
Apples	336	355	328	306
Melons	228	242	208	220
Peaches, Nectarines	91	107	95	90
Sour Cherries	93	92	81	75
Pears	64	74	64	70
Raspberries	61	66	62	57
Apricots	30	27	24	23
Strawberries	23	26	23	21
Other	73	77	69	57
<b>TOTAL</b>	<b>1,400</b>	<b>1,409</b>	<b>1,416</b>	<b>1,250</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Cabbage and Kale	261	289	290	290
Peppers	114	165	228	220
Tomatoes	128	147	160	160
Cucumbers	53	53	55	55
Carrots	50	64	49	55
Onions	50	64	49	55
Beans	11	13	13	13
Other Vegetables	63	55	82	82
<b>TOTAL</b>	<b>730</b>	<b>850</b>	<b>925</b>	<b>930</b>

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

### IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Bananas	46	52	58	60
Apples	22	49	78	80
Easy Peelers	25	21	27	27
Oranges	47	41	47	47
Other	89	105	118	126
<b>TOTAL</b>	<b>229</b>	<b>268</b>	<b>329</b>	<b>340</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	26	26	30	30
Brassicas	14	12	11	12
Onions	6	6	7	7
Other	24	23	22	21
<b>TOTAL</b>	<b>70</b>	<b>67</b>	<b>70</b>	<b>70</b>

### EXPORTS

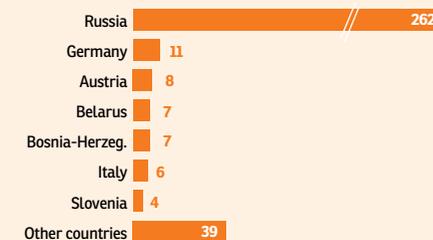
VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
Apples	127	175	218	220
Sweet Cherries	4	5	7	7
Sour Cherries	7	3	12	7
Plums	20	18	24	20
Strawberries	6	5	9	9
Other	51	61	74	87
<b>TOTAL</b>	<b>216</b>	<b>267</b>	<b>344</b>	<b>350</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Tomatoes	4	8	12	12
Peppers	6	12	13	13
Cucumbers, Gherkins	8	11	12	12
Brassicas	6	6	5	5
Onions	8	16	16	16
Other	15	16	26	27
<b>TOTAL</b>	<b>48</b>	<b>69</b>	<b>83</b>	<b>85</b>

### FRESH FRUIT EXPORTS 2016

BY DESTINATION ('000 tonnes)



### FROZEN FRUIT EXPORTS 2016

BY DESTINATION ('000 tonnes)



### TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2014	2015	2016	2017p
Import	98	116	140	150
Export	68	80	97	105
<b>TRADE BALANCE</b>	<b>-30</b>	<b>-36</b>	<b>-43</b>	<b>-45</b>

FRESH VEGETABLES	2014	2015	2016	2017p
Import	36	40	40	40
Export	22	28	36	40
<b>TRADE BALANCE</b>	<b>-14</b>	<b>-11</b>	<b>-4</b>	<b>0</b>



**Population**  
10.4 m



**Area**  
116,500 km<sup>2</sup>



**GDP per Inhabitant<sup>1)</sup>**  
4,000 EUR



**GDP Growth<sup>1)</sup>**  
3.1 per cent



**Unemployment<sup>1)</sup>**  
21.8 per cent

# SOUTHEAST EUROPE

## ALBANIA, BOSNIA-HERZEGOVINA, KOSOVO, F.Y.R. OF MACEDONIA

Bosnia and Herzegovina, Kosovo, Albania and Macedonia are smaller countries in the western Balkans. Apart from Albania, all of them formerly belonged to Yugoslavia. The population of these four countries comprises 10.4m inhabitants across an area of 12m hectares, making them comparable to Greece in terms of population and size. While GDP growth in the region is impressive at more than 3 per cent, double-digit unemployment rates plague all of these countries.

Typical export destinations are neighbouring countries, Russia and – for some products – western Europe (plums, tomatoes and frozen fruit). Imports are mainly tropical fruit like bananas or citrus.

Bosnia and Herzegovina is the region's most northern and biggest 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 plums and are exported in major volumes, although this depends on production in the importer countries: due to small plum crops in Germany and Austria, exports rose significantly in 2017. The major destination for apple exports is Russia, which took 12,000 tonnes in 2016. Berries, mainly raspberries, are also important, with production reaching an estimated 22,000 tonnes in 2016, but much of this was exported frozen, mainly to western Europe. Since Bosnia and Herzegovina has the highest population of the four, it is also the group's biggest importer of fresh fruit and vegetables. Bananas and tomatoes are the most important import categories.

Kosovo is a much smaller, but has also regions suited to fruit and vegetable production. Due to the regional conflict with Serbia, however, it is difficult to get detailed data on production and foreign trade.

Albania has a long tradition of sending vegetables to western Europe – mainly tomatoes, which are still important in terms of production and export. Melons play a prominent role in its fruit production, meanwhile, with apples, plums and citrus also important. Macedonia is the region's most important fruit and vegetable producer and exporter, with notable diversification in terms of its apple exports. Russia, which took 12,000 tonnes of apples in 2016, is among the most important destinations, but not as prominent as Serbia. 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	2014	2015	2016	2017p
<b>Bosnia-Herzegovina</b>	<b>197</b>	<b>318</b>	<b>314</b>	<b>300</b>
– Plums	74	117	132	110
– Apples	45	92	62	60
– Raspberries	11	14	22	25
<b>Kosovo</b>	<b>67</b>	<b>65</b>	<b>90</b>	<b>70</b>
<b>Albania</b>	<b>499</b>	<b>526</b>	<b>544</b>	<b>500</b>
– Melons	259	281	284	280
– Apples	82	92	102	90
<b>F.Y.R. of Macedonia</b>	<b>314</b>	<b>361</b>	<b>322</b>	<b>300</b>
– Melons	137	131	140	140
– Apples	96	137	101	90

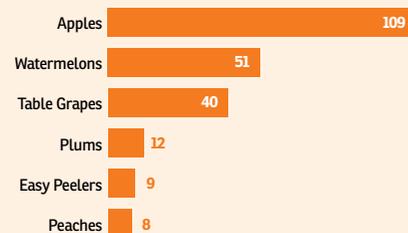
FRESH VEGETABLES	2014	2015	2016	2017p
<b>Bosnia-Herzegovina</b>	<b>211</b>	<b>253</b>	<b>330</b>	<b>330</b>
– Cabbage	58	63	80	85
– Tomatoes	30	41	57	55
<b>Kosovo</b>	<b>131</b>	<b>109</b>	<b>117</b>	<b>115</b>
<b>Albania</b>	<b>691</b>	<b>749</b>	<b>876</b>	<b>870</b>
– Tomatoes	234	256	284	280
– Onions	110	91	99	100
– Cucumbers	80	83	94	95
<b>F.Y.R. of Macedonia</b>	<b>639</b>	<b>714</b>	<b>670</b>	<b>700</b>
– Tomatoes	161	173	162	165
– Onions	60	60	61	60

1) Albania, Bosnia-Herzegovina and Macedonia.

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

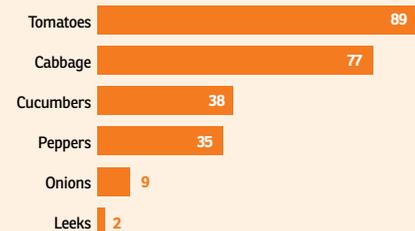
### FRESH FRUIT EXPORTS 2016

ALBANIA, BOSNIA-HERZEG., KOSOVO, MACEDONIA ('000 tonnes)



### FRESH VEGETABLE EXPORTS 2016

ALBANIA, BOSNIA-HERZEG., KOSOVO, MACEDONIA ('000 tonnes)



### IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
<b>Bosnia-Herzegovina</b>	<b>163</b>	<b>171</b>	<b>190</b>	<b>195</b>
– Bananas	39	42	48	50
– Apples	25	31	29	30
<b>Kosovo</b>	<b>29</b>	<b>30</b>	<b>33</b>	<b>35</b>
<b>Albania</b>	<b>76</b>	<b>70</b>	<b>78</b>	<b>80</b>
– Bananas	17	21	23	25
<b>F.Y.R. of Macedonia</b>	<b>60</b>	<b>57</b>	<b>69</b>	<b>70</b>
– Bananas	20	20	23	25

FRESH VEGETABLES	2014	2015	2016	2017p
<b>Bosnia-Herzegovina</b>	<b>64</b>	<b>63</b>	<b>70</b>	<b>72</b>
– Tomatoes	17	15	19	20
– Peppers	11	12	13	14
– Onions	8	8	7	8
<b>Kosovo</b>	<b>22</b>	<b>23</b>	<b>23</b>	<b>24</b>
<b>Albania</b>	<b>13</b>	<b>13</b>	<b>12</b>	<b>12</b>
<b>F.Y.R. of Macedonia</b>	<b>9</b>	<b>13</b>	<b>12</b>	<b>12</b>

### EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2014	2015	2016	2017p
<b>Bosnia-Herzegovina</b>	<b>16</b>	<b>31</b>	<b>31</b>	<b>33</b>
– Apples	8	17	14	15
– Plums	4	5	6	8
<b>Kosovo</b>	<b>3</b>	<b>3</b>	<b>4</b>	<b>4</b>
<b>Albania</b>	<b>30</b>	<b>52</b>	<b>43</b>	<b>45</b>
<b>F.Y.R. of Macedonia</b>	<b>156</b>	<b>173</b>	<b>167</b>	<b>165</b>
– Apples	69	82	82	80
– Table Grapes	28	38	39	39

FRESH VEGETABLES	2014	2015	2016	2017p
<b>Bosnia-Herzegovina</b>	<b>8</b>	<b>12</b>	<b>17</b>	<b>17</b>
<b>Kosovo</b>	<b>5</b>	<b>3</b>	<b>5</b>	<b>5</b>
<b>Albania</b>	<b>51</b>	<b>85</b>	<b>103</b>	<b>110</b>
– Tomatoes	33	58	64	65
– Cucumbers	5	11	15	15
<b>F.Y.R. of Macedonia</b>	<b>207</b>	<b>164</b>	<b>171</b>	<b>170</b>
– Cabbage	70	40	68	65
– Peppers	35	34	29	30
– Tomatoes	29	27	24	25

### TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

ALBANIA	2014	2015	2016	2017p
Import	45	45	50	52
Export	19	38	51	50
<b>TRADE BALANCE</b>	<b>-25</b>	<b>-7</b>	<b>1</b>	<b>-2</b>

F.Y.R. OF MACEDONIA	2014	2015	2016	2017p
Import	32	35	40	42
Export	112	111	119	95
<b>TRADE BALANCE</b>	<b>79</b>	<b>76</b>	<b>79</b>	<b>53</b>

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