



FRUIT LOGIS TICA

2020
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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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A Normal Year?

Looking at the production figures for fresh fruit and vegetables in Europe, 2019/20 might qualify as a normal year. But global figures are often misleading – apple growers in Poland who lost their crop due to late frosts are unlikely to draw comfort from the fact that Spanish peach producers had a large harvest. The European Statistical Handbook allows a sufficiently detailed analysis that takes such regional and sectoral differences into account.

Weather is still the decisive factor in fruit and vegetable cultivation, and climate change exacerbates this problem. A young lady from Sweden and the spectre of huge forests aflame in Australia have shown us that it can no longer be ignored.

Sustainability has been on the agenda in recent years, but now it has become a priority. How to avoid packaging waste while protecting the product will remain one of the major issues in the industry. At the same time, the trade in fresh fruit and vegetables is becoming more international and new suppliers are appearing. For this reason, we have included countries from Eastern Europe in this edition.

The European Statistics Handbook provides valuable information that can help you make decisions in most relevant European markets.



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In cooperation with:

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Population
513.5 m



Area
4,381,300 km²



GDP per Inhabitant
30,960 EUR



GDP Growth
2.0 per cent

EUROPEAN UNION



After an abundant fruit harvest in 2018/19 with almost 47m tonnes, production in the EU is estimated to be slightly lower for the 2019/20 marketing year. This is due to low production of topfruit and smaller harvests of kiwifruit and citrus. At 10.6m tonnes, 2019 saw one of the smallest EU apple crops of the past 20 years. The spring frosts in eastern European countries, which also damaged other types of fruit in the region, were the decisive factor. Kiwifruit production is estimated to have fallen 3 per cent in the EU, mainly due to a decline in Italy, Europe's leading producer, where a larger volume of yellow varieties was more than offset by decreasing production of green varieties.

For citrus, major producing countries like Spain and Greece are expecting a smaller harvest after high output in the previous year. Spain is by far the largest

citrus supplier for central and northern Europe, accounting for more than 50 per cent of their imports. At the beginning of September 2019, the weather phenomenon known in Spain as Gota fría brought thunderstorms to the south-east of the country, flooding entire regions. It is clear that the Ministry of Agriculture's early September crop forecast of 6.27m tonnes (down 17 per cent compared with 2018/19) will not be achieved. Although table grape production forecasts in both Italy and Spain were not bad, rainfall is also likely to have put a spoke in the wheel there.

After a decline in the previous 12 months, stonefruit production was again abundant across southern Europe last summer. Kaki supply was also expected to increase in 2019/20, while melons and watermelons were available in sufficient quantities. However, the weather in central Europe's largest import markets has a much bigger effect on the market than the volume harvested to the south, and last summer was again a good one for melons: while the previous year's record was only exceeded in June, overall temperatures were again very warm, with individual days in July in excess of 40°C causing sunburn to crops like apples and onions in central Europe.

The EU vegetable harvest was on course to recover in 2019 after a drought-induced slump in the previous year, returning to the previous level of just under 60m tonnes. Despite being technically a fruit, a large proportion of vegetable production is made up of tomatoes for processing. Unfortunately, most official figures are not yet available, but the World Processing Tomato Council is forecasting growth of 3-5 per cent in the southern EU member states, while production for the fresh market in north-west Europe is also likely to have been higher again. For other crops, the results point in the same direction. Although Poland expects a further reduction in vegetable production of around 8 per cent following an already reduced harvest in the previous year, a high proportion of its vegetable harvest ends up processed.

Continued on page 4

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Apples	11,840	9,251	13,275	10,556
Oranges	6,325	6,206	6,518	5,861
Easy Peelers	3,292	2,927	2,780	3,000
Watermelons	3,036	3,204	3,181	3,190
Peaches	2,161	2,532	2,416	2,550
Pears	2,343	2,422	2,613	2,047
Melons	1,797	1,795	1,790	1,840
Table Grapes	1,728	1,640	1,785	1,690
Nectarins	1,373	1,578	1,325	1,506
Other	11,246	11,482	12,290	11,395
TOTAL	45,141	43,037	47,973	43,635

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes ²⁾	17,958	17,399	16,731	18,000
Onions, dry	6,266	6,201	5,406	6,341
Carrots	5,599	5,779	5,310	5,400
Head Cabbage	3,791	3,743	3,397	3,700
Cucumbers	2,684	2,718	2,757	2,860
Peppers	2,520	2,654	2,584	2,580
Cauliflower	2,330	2,442	2,376	2,400
Headed Lettuce	2,288	2,365	2,239	2,220
Courgettes	1,535	1,543	1,548	1,500
Other	15,433	15,745	15,476	14,499
TOTAL	60,404	60,589	57,824	59,500

1) Excluding potatoes. 2) Including tomatoes for processing. 3) Excluding products grown for processing.

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



Unemployment
4.4 per cent

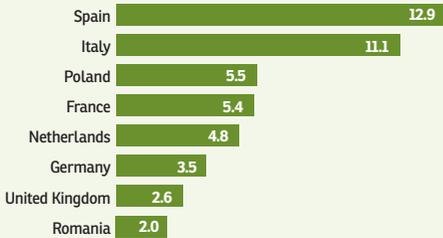


CPI for Food
(2015=100)
103.9



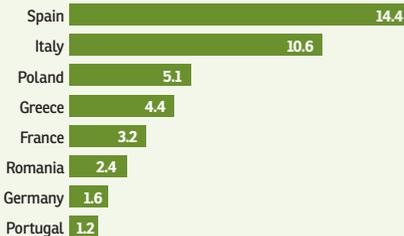
TOP 8 VEGETABLE PRODUCERS 2018

(million tonnes)



TOP 8 FRUIT PRODUCERS 2018

(million tonnes)



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Spain	13,858	13,308	14,244	13,258
Italy	10,746	10,281	10,527	10,813
Poland	5,048	3,565	5,844	3,543
France	3,151	3,025	2,932	3,174
Greece	3,051	3,188	3,233	3,158
Romania	1,726	1,630	2,436	2,300
Germany	1,334	847	1,561	1,278
Portugal	1,067	1,270	1,184	1,200
Hungary	970	933	1,130	1,200
Netherlands	786	659	760	761
Belgium	610	454	657	619
United Kingdom	440	423	437	426
Bulgaria	318	375	368	370
Austria	158	275	550	330
Croatia	152	135	208	200
Czechia	153	126	189	195
Cyprus	144	128	127	135
Slovenia	60	26	106	110
Lithuania	72	86	94	95
Slovakia	28	43	55	60
Sweden	45	42	51	44
Denmark	52	40	52	42
Ireland	29	28	26	28
Other EU	50	49	60	58
TOTAL	44,048	40,936	46,831	43,397

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Spain	10,065	9,752	9,869	10,134
Italy	6,966	6,795	6,968	6,932
Poland	5,930	6,030	5,630	5,240
Netherlands	4,912	5,486	4,760	5,230
France	5,169	5,245	5,053	4,970
Germany	3,745	4,026	3,523	3,846
United Kingdom	2,286	2,409	2,085	2,342
Portugal	2,444	2,507	2,025	2,250
Romania	1,814	1,933	2,047	2,100
Greece	1,778	1,729	1,660	1,712
Belgium	1,722	1,777	1,620	1,701
Hungary	1,445	1,483	1,352	1,400
Austria	615	597	562	611
Bulgaria	563	419	454	460
Sweden	372	342	307	335
Denmark	316	331	324	326
Finland	263	254	253	254
Czechia	228	242	199	220
Ireland	211	207	204	210
Lithuania	230	190	208	205
Croatia	169	156	153	155
Slovakia	113	92	103	110
Slovenia	105	95	100	102
Other EU	250	210	210	221
TOTAL	51,711	52,307	49,669	51,066

EUROPEAN UNION

Despite its strong production potential, the EU also depends on imports of fresh fruit and vegetables: its trade balance is negative for both, although the deficit for fruit is much larger because bananas and other tropical

fruits are only produced in minor quantities in the EU.

The share of imports from third countries is significantly higher with fresh fruits than it is for vegetables. In fact, 43 per cent of fruit imports come from countries outside the EU. Bananas are by far the most important single import product. After a difficult year in 2018, the banana market seems to have recovered in 2019; while imports fell slightly, prices stayed above average levels. Even a rise in imported volumes at the end of last year did not seem to bring prices down.

In 2018, a good 17 per cent of banana imports from outside the EU came from African, Caribbean and Pacific (ACP) countries. Bananas from these nations enjoy preferential trade access to the EU, but their share of imports (21 per cent in 2015) has been sinking. Among the most important ACP suppliers Côte d'Ivoire, Dominican Republic and Cameroon, the latter especially has lost market share, with growth out of Ghana failing to make up the shortfall. Imports of so-called "dollar bananas" grew 800,000 tonnes or almost 20 per cent from 2015 to 2018. Ecuador, Colombia and Costa Rica are the main suppliers, providing each more than 1m tonnes.

Banana trade within the EU consists mainly of re-exports, but there is also an EU production of approximately 600,000 tonnes – the Canary Islands and Martinique being the main growing regions.

Citrus is second in the EU import ranking. Here, intra-EU trade is more important than third-country imports, and Spain is by far the most important citrus exporter. Imports from outside the bloc are dominated by South Africa, followed by Egypt and Morocco. South America also supplies a noteworthy volume, especially lemons.

Apple imports are also dominated by trade within the EU. Imports from Southern Hemisphere suppliers are still important, but they have declined by almost 200,000 tonnes in the last few decades. Only in seasons with a short European crop – like 2017/18 – do imports from the Southern Hemisphere still exceed 5m tonnes.

Only 15 per cent of fresh vegetable imports originate outside the EU. Tomatoes from Morocco and onions from Southern Hemisphere countries or Egypt are the most important items. If we look at trade between EU members, onions and fruit vegetables like tomatoes, cu-

IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	3,009	3,269	3,139	2,853
Oranges	2,243	2,189	2,104	1,870
Apples, fresh market	2,131	2,225	1,902	1,768
Easy Peelers	1,777	1,578	1,510	1,432
Watermelons	1,264	1,298	1,406	1,349
Table Grapes	972	992	950	902
Lemons	766	875	810	804
Pears	910	879	809	713
Pineapples	467	467	498	454
Other	4,953	5,427	5,095	4,959
TOTAL	12,195	12,959	13,872	12,216

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes	2,572	2,474	2,486	2,248
Onions	1,283	1,236	1,332	1,226
Lettuce	1,321	1,313	1,330	1,171
Cucumbers	1,258	1,267	1,257	1,156
Peppers	1,182	1,205	1,237	1,118
Carrots	1,072	1,059	1,077	975
Cauliflower	518	561	538	470
Mushrooms	408	407	408	382
Courgettes	400	391	406	371
Other	2,961	3,047	3,052	2,799
TOTAL	12,976	12,960	13,123	11,916

EXPORTS – INTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	2,911	3,240	3,126	2,802
Oranges	2,436	2,368	2,345	2,110
Apples	2,135	2,206	1,907	1,779
Easy Peelers	1,816	1,668	1,662	1,601
Other	9,645	10,063	9,853	9,459
TOTAL	18,943	19,545	18,894	17,751

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes	2,779	2,636	2,609	2,368
Onions	1,494	1,324	1,486	1,443
Lettuce	1,364	1,376	1,398	1,210
Peppers	1,220	1,244	1,292	1,209
Other	6,662	6,704	6,855	6,255
TOTAL	13,519	13,283	13,641	12,486





IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	5,520	5,910	6,057	5,486
Pineapples	847	942	1,016	925
Oranges	950	1,050	1,084	897
Table Grapes	607	664	683	602
Avocados	447	486	607	540
Apples, fresh market	423	422	550	417
Easy Peelers	429	455	495	403
Watermelons	284	336	399	396
Lemons	413	353	471	366
Other	2,275	2,341	2,511	2,185
TOTAL	12,195	12,959	13,872	12,216

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes	525	570	629	536
Onions	284	242	287	566
Peppers	187	186	214	176
Carrots	76	43	88	80
Cucumbers	64	65	72	65
Courgettes	58	55	63	47
Mushrooms	19	19	17	20
Lettuce	7	14	11	8
Cauliflower	6	7	7	7
Other	606	596	641	575
TOTAL	1,833	1,797	2,029	2,080

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Apples	1,564	1,283	844	1,023
Oranges	318	299	318	307
Easy Peelers	259	211	228	223
Bananas	8	9	11	9
Other	1,402	1,446	1,264	1,236
TOTAL	3,551	3,247	2,665	2,798

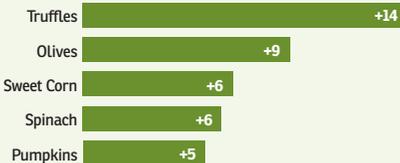
FRESH VEGETABLES	2016	2017	2018	2019p
Onions	832	950	767	627
Tomatoes	159	131	117	107
Peppers	107	113	109	104
Lettuce	90	86	91	81
Other	569	578	492	454
TOTAL	1,758	1,857	1,576	1,373

1) Excluding potatoes.

Sources: AMI-Informiert.de; Eurostat

TOP 5 FRESH VEGETABLE IMPORTS ^{*)}

VOLUME GROWTH (% p.a. 2009-2018)

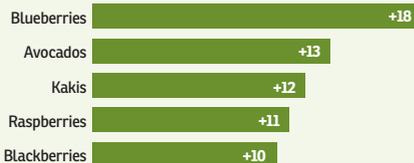


Fresh Vegetables **+2**

*) Intra-EU and Extra-EU Trade.

TOP 5 FRESH FRUIT IMPORTS ^{*)}

VOLUME GROWTH (% p.a. 2009-2018)



Fresh Fruit **+3**

*) Intra-EU and Extra-EU Trade.

cucumbers and peppers are the most important products.

Exports to countries outside the EU account for about 14 per cent of total export volumes from all EU countries combined. The most important items in these trade flows are apples in the case of fruit and onions in the case of vegetables. Citrus are the most important export articles in the fruit portfolio, with bananas – astonishingly enough – number two in this ranking.

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EUROPEAN UNION

Import statistics from Eurostat usually show the first destination in Europe, but not the final destination. With Rotterdam the main entry port on the European continent, it is therefore no surprise that the Netherlands is the most important fresh fruit importer. Large

volumes of fresh fruit exports are thus mainly re-exports: of 3.8m tonnes of fresh fruit exported from the Netherlands in 2018, only around 6 per cent was of Dutch production. To a lesser extent, this also applies to Belgium, where the port of Antwerp is of great importance to EU fruit imports. In all other countries and in the case of fresh vegetables, re-exports are not so dominant.

Germany, France and the UK are the EU's leading fresh produce import markets. But in contrast with many smaller EU members, imports in these markets do not grow – or grow only slightly. The rates are much higher in eastern Europe and southern Europe especially, albeit from a much lower base.

Spain is by far the largest exporter of fresh fruit and vegetables in the EU, and its exports are still growing; the last decade saw volume growth of one-third. Spain is equally strong in deciduous fruit – mainly stonefruit, berries and table grapes – as well as citrus and vegetables. The Netherlands occupies second position, even if we exclude re-exports, and have been stable over the past decade. Dutch fresh vegetable exports are clearly dominant, especially fruit vegetables from protected cultivation, and onions. A decrease in 2019 was mainly due to lower onion exports in the second half of the 2018/19 season. Italy is number three in the ranking of fresh fruit and vegetable exporters: deciduous fruits are the most important segment (topfruit, stonefruit and table grapes), while citrus and vegetable exports are increasingly confined to typical Italian specialities (for example blood oranges, fennel, radicchio, rocket etc). Poland's position has been considerably weakened by the ongoing Russian embargo, but many of the country's exporters have now found alternative markets. Among the smaller export nations, Portugal has had considerable success with exports of fresh berries.

Reflecting high per-capita consumption of fresh fruit and vegetables in the Mediterranean area, Italy and Spain are the biggest consumer markets when measured by volume purchased by private households. Germany has a much lower rate of consumption but a larger population, so it ranks third. After that is the UK, which has a rather high per-household figure thanks to

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Netherlands	4,300	4,561	5,031	4,933
Germany	5,309	5,444	5,286	4,880
United Kingdom	3,719	3,715	3,564	3,481
France	3,261	3,420	3,433	3,439
Belgium	2,394	2,514	2,396	2,163
Italy	1,795	2,043	2,002	1,945
Spain	1,548	1,666	1,811	1,699
Poland	1,462	1,686	1,550	1,520
Portugal	745	835	867	860
Romania	768	796	779	756
Czechia	704	699	666	663
Other	4,682	4,779	4,710	4,119
TOTAL	30,687	32,158	32,095	30,458

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Spain	7,194	7,498	7,144	7,815
Netherlands	3,522	3,777	4,076	3,807
Italy	3,059	2,911	2,568	2,393
Belgium	2,205	2,217	1,982	1,712
Greece	1,388	1,185	1,228	1,249
Poland	1,346	1,280	1,049	1,205
France	1,226	1,222	1,020	957
Germany	714	698	597	540
Portugal	322	465	492	491
Lithuania	381	385	264	223
Austria	220	171	172	188
Other	918	983	968	373
TOTAL	22,494	22,792	21,559	20,952

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	31,290	33,367	34,091	32,078
Export	22,367	23,404	23,166	21,491
TRADE BALANCE	-8,923	-9,963	-10,925	-10,587





IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Germany	3,292	3,271	3,299	3,056
United Kingdom	1,990	1,887	1,904	1,917
France	1,945	1,871	1,938	1,895
Netherlands	1,254	1,311	1,401	1,467
Belgium	1,190	1,197	1,062	918
Poland	548	560	596	723
Italy	597	646	651	677
Spain	549	537	648	609
Czechia	532	527	513	493
Romania	292	297	374	358
Sweden	351	348	347	329
Other	2,268	2,308	2,419	2,156
TOTAL	14,809	14,758	15,152	14,598

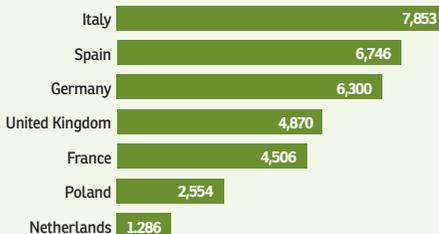
EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Spain	5,058	4,860	5,102	5,242
Netherlands	4,875	4,919	4,926	4,571
France	1,054	1,050	977	993
Belgium	848	950	818	858
Italy	930	827	866	790
Poland	714	735	737	618
Germany	427	429	464	361
Portugal	263	262	250	260
Austria	152	147	162	138
Greece	141	123	140	129
United Kingdom	135	119	126	123
Other	680	720	649	275
TOTAL	15,277	15,141	15,217	14,358

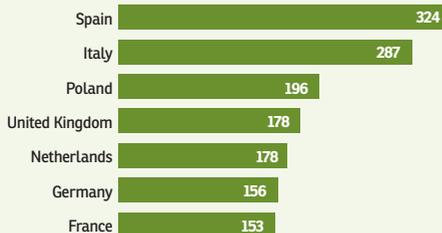
HOUSEHOLD DEMAND ¹⁾

QUANTITY BOUGHT FOR FRESH FRUIT AND VEGETABLES ('000 tonnes)



HOUSEHOLD DEMAND ¹⁾

QUANTITY BOUGHT FOR FRESH FRUIT AND VEGETABLES (kg/Household)



TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Import	16,526	17,315	17,051	17,033
Export	15,642	15,965	15,920	15,794
TRADE BALANCE	-884	-1,350	-1,131	-1,239

¹⁾ Excluding potatoes.

Sources: AMI-informiert.de; CSO; Ctifl; FPI; GfK; Eurostat, Kantar, MAPA

its elevated consumption of root vegetables and brassicas. If we looked at consumer expenditure, the ranking would be different: Germany would be top with a little less than €15bn, followed closely by Italy €14.5bn and the UK €12.9bn. Then come France and Spain with consumer expenditure of roughly €11bn each.



Population
11.5 m



Area
30,500 km²



GDP per Inhabitant
40,240 EUR



GDP Growth
1.5 per cent

BELGIUM

Belgium is one of Europe's smaller countries in terms of land area, but its ports make it an important hub for the continent's fruit and vegetable imports and exports. For example, exotic fruit accounts for almost 70 per cent of the country's fruit exports, despite not having the right climate to grow any such products itself. In fact, many exotics reach the EU exclusively via Belgium. In contrast, citrus and stonefruit imports remain mostly on the Belgian market. Vegetable import volumes are significantly lower than for fruit, and are dominated by carrots, onions, beans and peas. The latter two products are raw material for Belgium's dynamic frozen vegetable industry. Beans and peas in particular have only a small share of the fresh market, but are mostly grown under contract for processors. The contracted surface is not only located in Belgium, but also in the Netherlands or Germany, which results in corresponding imports.

In terms of production, Belgium ranks 11th in the EU for both fruit and vegetables. Fruit production is concentrated on pears and apples. In 2017, there were

massive weather-related cutbacks, especially for apples. This was followed by a record harvest in 2018. Last year, the apple and pear harvest was slightly down, but still above average. Apple production is dominated by the varieties Jonagold and Jonagored, while the leading pear variety is Conference. Pear production is strongly geared towards export. After exotics, pears are the fruit that Belgium exports in the largest volume. Strawberries are mainly produced in greenhouses, and fluctuations in harvest size from year to year are small as a result.

Vegetable production in Belgium is widespread and the position of other vegetables is therefore quite large. Tomatoes, leeks and carrots are the three vegetables produced in the biggest quantities. Considered the cradle of chicory production, Belgium is also one of Europe's largest producers of the vegetable (known locally as witlof), together with France and the Netherlands, and it is also a major consumer. Protected production of lettuce and speciality salads as well as fruit vegetables such as cucumbers, peppers and courgettes is also very prominent in Belgium. The produce itself is largely marketed via auctions. According to the Association of Belgian Horticultural Cooperatives (VBT), in 2018 its associated members sold fruit and vegetables worth €933.5m. Of this, 66 per cent was vegetables and 44 per cent fruit. Compared with the previous year, the situation has thus shifted slightly in the direction of vegetables. Measured by the quantity sold, tomatoes, pears and cucumbers were the top products in 2018. In terms of sales, strawberries were ahead of tomatoes and pears.

Although Belgium exports a lot of fruit and vegetables, the trade balance is negative. This is also due to its aforementioned function as a hub for produce in Europe.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Pears	322	310	369	331
Apples	234	88	231	229
Strawberries	45	48	48	49
Other	10	8	9	10
TOTAL	610	454	657	619

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes	260	256	259	260
Leeks	96	114	95	105
Carrots	93	93	78	85
Lettuce	41	41	35	40
Chicory Witlof	39	37	35	37
Peppers	27	28	26	27
Cucumbers	24	26	24	25
Courgettes	15	15	15	15
Celery	14	15	13	14
Other ²⁾	1,113	1,152	1,040	1,093
TOTAL	1,722	1,777	1,620	1,701

1) Excluding potatoes, open field and under glass.

2) Including products cultivated for processing.



Unemployment
3.6 per cent

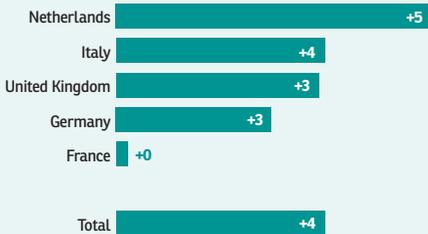


CPI for Food
(2015=100)
106.4



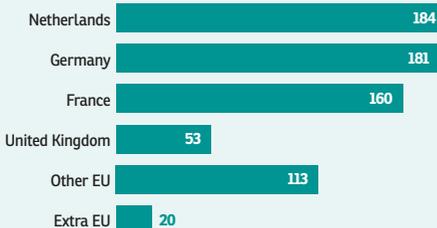
TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2009-2018)



FRESH VEGETABLE EXPORTS 2018

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VLAM

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Exotics	1,702	1,810	1,761	1,632
Citrus	267	252	215	208
Apples	131	152	146	118
Peaches	65	68	38	38
Other	249	258	253	243
TOTAL	2,414	2,539	2,414	2,241

FRESH VEGETABLES	2016	2017	2018	2019p
Carrots/Turnips	281	266	251	247
Onions/Shallots	141	138	114	116
Green Beans	79	98	94	94
Peas	112	122	94	82
Tomatoes	88	88	64	80
Cucumbers	97	90	71	72
Cauliflower	32	37	29	31
Other	355	353	341	349
TOTAL	1,186	1,192	1,058	1,072

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Exotics	1,507	1,583	1,465	1,280
Pears	326	309	288	300
Apples	211	163	122	161
Strawberries	41	48	45	43
Other	123	123	69	74
TOTAL	2,208	2,226	1,990	1,859

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes	220	218	220	238
Carrots/Turnips	139	191	175	208
Leeks	69	67	67	70
Cucumbers	68	65	54	53
Onions/Shallots	56	60	39	34
Peppers	40	43	34	33
Celery	34	29	28	28
Chicory	19	19	16	18
Other	201	254	181	221
TOTAL	845	946	815	902

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	2,518	2,715	2,587	2,329
Export	2,051	2,146	1,868	1,736
TRADE BALANCE	-467	-569	-719	-593

FRESH VEGETABLES	2016	2017	2018	2019p
Import	910	892	770	836
Export	821	828	706	793
TRADE BALANCE	-89	-64	-64	-43



Population
67.0 m



Area
633,200 km²



GDP per Inhabitant
34,980 EUR



GDP Growth
1.7 per cent

FRANCE

France produced around 3m tonnes of fruit and 5m tonnes of vegetables in 2018. This made France the fifth-largest producer of fruit and vegetables in Europe. Production depends a lot on the weather. In 2019, a heatwave and drought in summer were the dominating factors. Bans on irrigation in August 2019 led to some losses in fruit and vegetable crops, but had only a secondary impact on the total amount harvested. Overall, the French vegetable harvest is likely to fall just short of the previous year's level (-2 per cent). In contrast, France expected a larger fruit harvest in 2019. The main reason for this was increased production of topfruit and stonefruit.

Due to increasing demand, production of organic fruit and vegetables has been gaining in importance

in France. While in 2012 France spent an average of €61 per capita on organic food, in 2018 the figure was around €136 per inhabitant. Fruit and vegetables showed above-average growth and the area of organic fruit and vegetables now reflects that growing demand. Organic vegetable area increased from 14,500ha in 2013 to 21,000ha in 2017. In the same period, organic fruit area (excluding olives and vineyards) has grown from 19,000ha to almost 30,000ha, despite the total area for fruit and vegetables stagnating at 165,000ha (also excluding grapes and olives) and 235,000ha respectively. The government is supporting producers to convert their farms to organic.

While most of the fruit produced is sold fresh, this is not always the case with vegetables. Classic products for the fresh market are tomatoes, carrots, onions and cauliflower. On the other hand, up to 90 per cent of all peas, sweetcorn and green beans are processed into canned or frozen food. The largest production site of the leading producer of canned vegetables in Europe is located in France.

The trend to supply the French market with more domestic fruit and vegetables, which has continued for years, is reflected in declining exports. According to first estimates, France exported about 1m tonnes of vegetables and 900,000 tonnes of fruit last year. With imports stagnating at the same time, the trade balance for both fruit and vegetables is negative.

Due to the small domestic harvest, fruit and vegetable consumption declined in 2018. Every household in France bought 79kg of vegetables and 83kg of fruit in 2018, each 3kg less than in 2017. This trend was unlikely to continue in 2019. Data from Kantar Worldpanel for the first half of last year indicated a slight increase in fruit purchases, while vegetable purchases had plateaued.

Hypermarkets (33 per cent of expenditure) and supermarkets (19 per cent) remained the most important sales arenas in 2018, with the share of hard discount amounting to 11 per cent. Specialised trade has a share of 12 per cent and is becoming more important, mainly due to gains made by fresh supermarkets (grandes surfaces fraises) more than compensating for the losses of traditional greengrocers. Farmers' markets (11 per cent), as a source of fresh fruit and vegetables, remain an integral part of France's famed tradition of good eating.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹⁾	2016	2017	2018	2019p
Apples	1,515	1,424	1,477	1,652
Melons	259	286	255	225
Plums ²⁾	216	211	175	210
Bananas	291	184	191	190
Apricots	116	157	111	158
Pears	138	133	134	115
Peaches	113	122	97	112
Nectarines	94	100	82	98
Kiwifruit	65	58	55	55
Easy Peeler	40	42	48	45
Other	304	310	307	314
TOTAL	3,151	3,025	2,932	3,174

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes	823	772	712	703
Carrots	581	564	535	530
Onions	475	454	455	452
Sweetcorn	351	415	355	355
Green Beans	310	397	394	340
Cauliflower	289	290	237	250
Lettuce	228	219	222	240
Peas	228	250	251	230
Chicory	172	153	145	150
Leeks	151	160	147	150
Other	1,562	1,571	1,600	1,570
TOTAL	5,169	5,245	5,053	4,970

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



Unemployment
5.6 per cent

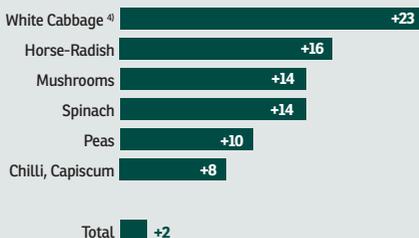


CPI for Food
(2015=100)
103.6



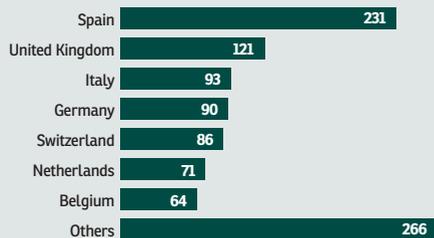
TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2009-2018)



FRESH FRUIT EXPORTS 2018

BY DESTINATION ('000 tonnes)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	572	690	750	695
Oranges	512	517	489	495
Clementines	371	355	334	365
Watermelons	168	188	202	225
Apples	173	165	174	180
Melons	174	180	169	165
Avocados	135	146	157	165
Others	1,152	1,175	1,130	1,120
TOTAL	3,256	3,416	3,405	3,410

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes	541	507	524	515
Sweet peppers	152	149	156	155
Carrots	153	155	157	150
Courgettes	151	138	144	150
Onions	143	136	140	140
Cucumbers	78	77	75	70
Others	728	708	742	735
TOTAL	1,945	1,869	1,938	1,915

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Apples	565	524	419	340
Bananas	255	251	250	200
Watermelons	20	27	34	40
Oranges	46	46	41	35
Melons	44	43	39	35
Others	299	332	239	250
TOTAL	1,228	1,224	1,022	900

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes	248	231	224	235
Cauliflower ³⁾	96	146	105	130
Beans	108	111	124	100
Onions	99	80	91	90
Peas	60	72	69	80
Carrots	119	87	71	80
Other	326	324	293	310
TOTAL	1,054	1,050	977	1,025

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	3,511	3,732	3,681	3,545
Export	1,325	1,348	1,165	1,005
TRADE BALANCE	-2,186	-2,384	-2,516	-2,540

FRESH VEGETABLES	2016	2017	2018	2019p
Import	2,121	2,188	2,295	2,440
Export	1,065	1,070	956	1,060
TRADE BALANCE	-1,056	-1,118	-1,339	-1,380



Population
83.0 m



Area
357,300 km²



GDP per Inhabitant
40,340 EUR



GDP Growth
1.5 per cent

GERMANY

Fruit and vegetable production in Germany is limited due to its climate. Heat-loving and frost-sensitive species such as citrus, exotic fruit and some stonefruit cannot be grown there. Germany is almost entirely dependent on imports. The import share of fruit vegetable species grown under protection is also still very high, even if new greenhouses have been built in recent years. In the past two years, summer droughts have increasingly been a problem. The effect of the dry summer was felt more keenly in 2018 than it was in 2019, and the vegetable harvest has fallen to a low level, affecting especially autumn vegetables such as onions, carrots and cabbage, which account for a large share of the total vegetable harvest. Although last summer was also dry, there was more rainfall in most areas than in 2018. But record tem-

peratures in June caused some damage to fruit crops. In growing areas in the north of the country, autumn vegetables were still able to benefit from rainfall in September and October. Consequently, the 2019 vegetable harvest was bigger than the previous one. Germany's fruit harvest reached a record level in 2018. Following the frost-related losses in 2017, fruit set was very good. Conditions were also good during the harvest. The 2019 harvest was unable to repeat this record result. The apple harvest in particular was smaller again, some damage from sunburn was also noted there.

In total, 126,471ha of open field vegetables are cultivated in Germany. Asparagus accounts for almost a fifth of the total area, followed by carrots, onions and white cabbage. Most recently, production of edible pumpkins has expanded. In 2019, a total of 3.6m tonnes of vegetables were harvested outdoors, which means Germany has a 7 per cent share of total European vegetable production. In recent years, the fruit harvest has fluctuated between 0.8m and 1.4m tonnes, with the smallest harvest in 2017 due to late frost damage in April. Apples account for around 75 per cent of the country's total fruit crop, followed by strawberries, the production of which has recently shifted further into protected cropping. For other berries, areas are tending to stagnate, despite the fact the market is booming. In the case of blueberries and especially raspberries, domestic producers have had to leave large parts of the growing market to imports. Last year was a record one for blueberries: never before have imports and purchases among private households been as high as they were in 2019. Due to the global soft fruit industry's expansion, larger quantities are pushing onto the German market, and prices are under pressure.

Even if some types of fruit and vegetables were entering the country in larger quantities, total fruit and vegetable imports in 2019 will not quite reach the level of the previous year. While Germany is achieving a degree of self-sufficiency of around 36 per cent for vegetables (fresh and processed), the figure for fruit is only around 15 per cent. The major imported fruits include bananas, melons, citrus and exotics. In the case of vegetables, the main imports are tomatoes, cucumbers and peppers.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹⁾	2016	2017	2018	2019p
Apples	1,033	597	1,093	950
Strawberries	143	135	142	134
Plums	38	24	61	48
Sweet Cherries	29	17	44	48
Pears	35	23	48	37
Blueberries	11	14	13	16
Currants	14	12	16	15
Sour Cherries	16	8	16	12
Mirabelle Plums	4	3	9	5
Other	11	14	5	15
TOTAL	1,334	847	1,447	1,278

FRESH VEGETABLES ^{2) 3)}	2016	2017	2018	2019p
Carrots	642	734	625	670
Onions	523	541	410	497
White Cabbage	431	479	355	450
Gerkins	207	192	200	205
Iceberg Lettuce	121	136	134	135
Red Cabbage	119	146	104	130
Asparagus	120	131	133	122
Cauliflower	93	98	91	95
Spring Onions	94	92	94	94
Other	1,166	1,221	1,109	1,177
TOTAL	3,516	3,770	3,255	3,575

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

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



Unemployment
2.4 per cent

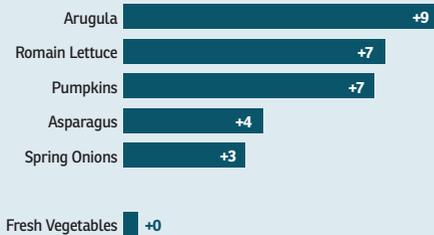


CPI for Food
(2015=100)
104.0



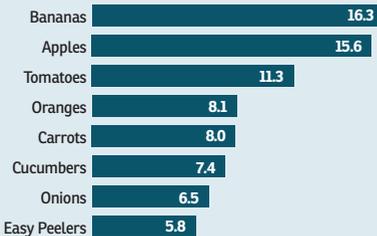
TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2009-2018)



TOP 8 FRUIT AND VEGETABLES 2018

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	1,403	1,418	1,261	1,293
Apples	520	629	556	504
Watermelons	401	412	510	463
Oranges	490	462	473	460
Easy Peelers	414	380	368	380
Table Grapes	330	338	320	299
Nectarines	172	183	153	166
Pears	169	170	167	157
Pineapples	170	148	163	147
Other	1,318	1,449	1,398	1,446
TOTAL	5,387	5,589	5,368	5,314

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes	743	734	741	698
Cucumbers/Gherkins	467	483	496	501
Pepper	392	395	401	378
Lettuce	317	305	298	291
Carrots	254	240	252	277
Onions	248	227	240	264
Courgettes	89	89	97	94
Mushrooms	97	98	93	88
Cauliflower	65	80	77	74
Other	620	620	603	595
TOTAL	3,292	3,271	3,299	3,260

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	358	343	247	279
Apples	82	90	60	57
Table Grapes	28	33	31	24
Oranges	32	28	29	23
Other	215	200	228	200
TOTAL	715	694	596	583

FRESH VEGETABLES	2016	2017	2018	2019p
Onions	87	89	73	54
White Cabbage	39	43	47	50
Lettuce	40	43	46	49
Cucumbers/Gherkins	39	35	40	27
Other	222	219	258	231
TOTAL	427	429	464	411

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	5,695	6,045	6,218	5,910
Export	797	786	742	699
TRADE BALANCE	-4,898	-5,259	-5,476	-5,211

FRESH VEGETABLES	2016	2017	2018	2019p
Import	4,301	4,550	4,487	4,506
Export	364	374	392	405
TRADE BALANCE	-3,937	-4,176	-4,095	-4,101



Population
10.7 m



Area
132,000 km²



GDP per Inhabitant
17,270 EUR



GDP Growth
1.9 per cent

GREECE

Greece has a positive trade balance for both fruit and vegetables. While the export value of fruit has recently recovered after a sharp decline in 2017, the export value of vegetables has been declining for years. In any case, fruit exports are more important than vegetable exports: while around 40 per cent of the fruit harvest leaves the country, only around 8 per cent of the vegetable harvest is exported. The most important fruit export products include oranges, watermelons, kiwifruit and peaches. The main types of vegetables exported are cucumbers, tomatoes and peppers. Important destination markets for Greek exports are Romania and Bulgaria, but also Germany and Poland. Greece imports fruit and vegetables only to a small extent. This has to do with

economic conditions, but also the fact that Greece's climate allows it to grow almost all types of fruit and vegetables.

Fruit production is more important than vegetables, which until 2018 decreased continuously. Preliminary figures for 2019, however, suggest that this trend will come to an end. For the first time in several years, the vegetable harvest has grown again. The onion crop in particular has recovered from the previous year's low level. Due to weather conditions, the onion harvest in 2018 was very small. This is not unique to Greece, but happened also in other European countries. As the small stocks were cleared early, onions had to be imported on a larger scale at the beginning of 2019. Compared with other years, onion imports have more than tripled and onions have at once become the most important vegetable in imports. These onions came largely from Egypt and some were redistributed to other European countries. Besides onions, fruit vegetables make up the largest part of the Greek vegetable crop. These are mainly produced in protected cultivation. Crete is the most important region for greenhouse cultivation. Fruit production in 2019 could not quite match the high level of the previous year. In the case of apples and peaches in particular, the harvest volume fell short of that of the previous year. Overall, citrus accounts for the largest share of the fruit harvest, with a stronger focus on oranges than in other Mediterranean countries and less on easy peelers or lemons. Melons in Greece are mainly watermelons. They are produced in large quantities. Households in Greece eat large quantities of watermelons themselves. However, the two hot summers of 2018 and 2019 have also led to a further significant increase in exports. Another important pillar of production is stonefruit. While the peach harvest fell short of the record level of the previous year, nectarines and apricots were able to match the previous year's results. Weather conditions for the production of cherries were again slightly better than in previous years, so that larger quantities could be harvested and exported.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Oranges	877	961	913	910
Watermelons	628	647	630	620
Table Grapes	315	310	294	290
Apples	259	231	301	275
Kiwifruit	217	220	220	220
Peaches ¹⁾	175	203	244	216
Easy Peelers	176	174	174	172
Nectarines	87	97	116	119
Apricots	55	90	80	80
Other	263	255	260	256
TOTAL	3,051	3,188	3,233	3,158

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes ¹⁾	564	540	532	534
Onions	207	207	145	200
Peppers	137	157	146	143
Cucumbers	107	107	121	117
Cabbage	88	80	86	85
Courgettes	76	77	76	75
Green Beans	67	60	58	62
Lettuce	69	64	58	60
Cauliflower, Broccoli	61	51	59	56
Other	402	385	378	380
TOTAL	1,778	1,729	1,660	1,712

¹⁾ Excluding products grown for processing.

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



Unemployment
11.5 per cent

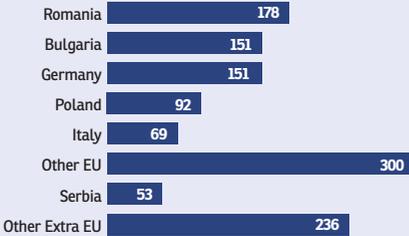


CPI for Food
(2015=100)
101.9



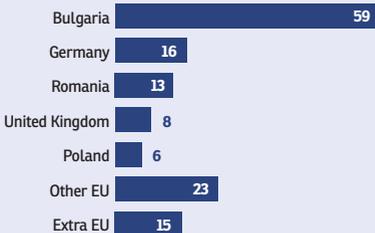
FRESH FRUIT EXPORTS 2018

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2018

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	152	184	226	214
Lemons	17	24	19	22
Apples	20	13	15	20
Pineapples	8	10	13	14
Other	38	43	39	34
TOTAL	235	274	311	303

FRESH VEGETABLES	2016	2017	2018	2019p
Onions	11	10	10	36
Tomatoes ¹⁾	18	18	29	18
Mushrooms	7	10	10	10
Other	29	32	34	39
TOTAL	65	70	83	103

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Oranges	462	277	314	287
Watermelons	178	173	184	187
Kiwifruit	132	130	135	151
Peaches	100	116	95	103
Apples	85	75	72	89
Table Grapes	79	90	66	63
Nectarines	69	71	65	60
Strawberries	23	27	29	44
Apricots	16	25	24	23
Cherries	16	17	17	22
Pears	5	8	7	8
Other	227	183	223	217
TOTAL	1,392	1,191	1,231	1,255

FRESH VEGETABLES	2016	2017	2018	2019p
Cucumbers	40	34	42	38
Tomatoes	41	37	38	34
Peppers	21	20	19	16
Other	43	32	41	42
TOTAL	145	123	140	130

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	179	205	213	214
Export	759	697	730	742
TRADE BALANCE	580	492	517	528

FRESH VEGETABLES	2016	2017	2018	2019p
Import	62	67	76	86
Export	117	103	105	93
TRADE BALANCE	55	36	29	7



Population
60.4 m



Area
302,100 km²



GDP per Inhabitant
29,220 EUR



GDP Growth
0.8 per cent

ITALY

Italy is the second-largest producer of fruit and vegetables in Europe. Due to its different climate zones, the variety of products grown is very wide. For some fruits and vegetables, such as table grapes, pears, kiwifruit or apricots, it is even the largest producer and supplier in the European market. However, the weather was not optimal in 2019. In addition to hail and heavy rainfall, last summer's heat had a negative impact on some crop yields. For this reason, the vegetable harvest of 6.93m tonnes is likely to fall just slightly short of the previous year's level. In the fruit segment, pears and grapes suffered heavy losses. However, bigger harvests of stonefruit and citrus compensated for losses in other fruit categories, so the fruit harvest of 10.8m tonnes was probably somewhat greater than in 2018.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Apples	2,272	1,704	2,264	2,195
Oranges	1,590	1,583	1,592	1,866
Melons	1,166	1,177	1,190	1,189
Table Grapes	997	978	1,028	880
Easy Peelers	698	747	578	804
Nectarines	657	688	573	654
Peaches ²⁾	537	588	503	562
Pears	681	738	730	511
Kiwifruit	452	369	393	371
Others	1,696	1,710	1,675	1,781
TOTAL	10,746	10,281	10,527	10,813

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes ²⁾	979	940	986	984
Courgettes	554	536	560	558
Fennel	505	514	525	513
Carrots	521	476	468	506
Lettuce	475	473	488	462
Onions	451	410	372	390
Artichokes	366	388	390	379
Cauliflower/Broccoli	388	372	368	348
Aubergines	318	286	298	327
Sweet Peppers	271	250	260	265
Others	2,138	2,150	2,253	2,200
TOTAL	6,966	6,795	6,968	6,932

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

Italy is an export nation when it comes to fruit and vegetables. Around 27 per cent of the fruit harvest and 13 per cent of the vegetable harvest have been exported in recent years. Germany has been the main market for fruit and vegetables for years, followed by France and Poland. In 2019, fruit exports were set to reach more or less the same level as in the previous year. Apples, table grapes and kiwifruit have been Italy's export classics for years. The highest export growth in the last ten years has been achieved by blueberries and blackberries starting from a comparatively low level. As in many other countries, cultivation of berries is booming in Italy.

In contrast with fruit, vegetable exports are unlikely to be as strong as in previous years. It is becoming apparent that Italy imported more vegetables in 2019, but that fruit imports are stagnating. These are mostly exotic fruits such as bananas or pineapples. The most important import product in the vegetable department are tomatoes followed by salads and peppers. In 2019, the trade balance for both fruit and vegetables was less positive than in 2018.

In addition to supplying the fresh market, processing plays an important role in Italy. Italy is the world number three in tomato processing. In addition to the tomatoes sold on the fresh market, Italy produced around 4.8m tonnes of tomatoes in 2019, which were processed into pulp, tomato paste and ketchup, for example.

Compared with other European countries, fruit and vegetable consumption in Italy is higher. In 2018, each Italian household bought around 183kg of fruit and 125kg of vegetables. This means that purchases have risen by 7 per cent since 2013. On average, each household spent around €297 on fruit and €125 on vegetables in 2018. Italian households are increasingly demanding organic food. Penetration for organic food alone rose from 53 per cent to 81 per cent between 2012 and 2018. This development does not stop at vegetables and fruit. Due to increasing demand, more and more Italian farmers have decided to produce their products according to ecological standards. In 2018, the organic agricultural area nationwide amounted to around 2m tonnes compared with 800,000m tonnes in 2010. Growth in organic area also continues for fruit and vegetables. While 2018 saw a year-on-year increase in the area for vegetables (61,155ha, +11 per cent), fruit (36,900ha, +9 per cent) and nuts (50,200ha, +6 per cent), citrus saw a decline in area (35,700ha, -10 per cent).





Unemployment
6.1 per cent

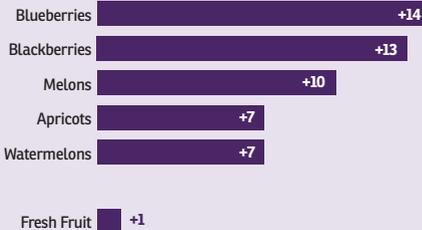


CPI for Food
(2015=100)
102.5



TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2009-2018)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2018)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	712	775	801	745
Oranges	137	232	177	180
Pineapples	141	164	176	160
Lemons	104	122	115	125
Others	722	744	725	735
TOTAL	1,816	2,037	1,994	1,945

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes ²⁾	118	132	130	150
Lettuce	106	113	125	135
Sweet Peppers	71	74	83	90
Others	302	326	313	390
TOTAL	597	646	651	765

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Apples	1,010	976	673	1,010
Table Grapes	474	502	465	330
Kiwifruit	413	322	293	310
Watermelons	234	215	299	220
Peaches/Nectarines	253	223	160	135
Pears	150	138	155	115
Easy Peelers	88	94	80	100
Oranges	152	111	138	95
Lemons	46	47	47	45
Others	240	350	280	260
TOTAL	3,060	2,977	2,590	2,620

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Lettuce	200	191	207	200
Carrots	98	76	83	80
Cauliflower/Broccoli	90	83	82	65
Kohlrabi/Kale	66	66	66	65
Tomatoes	105	67	79	60
Beetroot	60	60	58	55
Fennel	62	50	56	50
Onions	45	43	36	30
Courgettes	34	28	25	20
Others	170	161	173	170
TOTAL	930	827	865	795

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	1,625	1,780	1,746	1,680
Export	2,898	3,074	2,806	2,490
TRADE BALANCE	1,273	1,294	1,060	810

FRESH VEGETABLES	2016	2017	2018	2019p
Import	614	688	649	845
Export	1,230	1,250	1,269	1,220
TRADE BALANCE	616	562	620	375



Population
17.3 m



Area
41,500 km²



GDP per Inhabitant
44,920 EUR



GDP Growth
2.6 per cent

NETHERLANDS

Dutch fruit production is dominated by topfruit, especially pears and apples. The main apple varieties are Elstar and Jonagold. Overall, cultivation of apples has continues to fall. By contrast, pear production area continues to grow noticeably, even if growth is mainly limited to the Conference variety. For strawberry production (glasshouse and open-field) there was again less space available recently. In contrast, bush-grown berries are on the advance. In the last decade already, the area of blueberries has almost doubled to over 900ha.

Onions are the most important vegetable crop in terms of cultivated area. After the dry summer of 2018, last year's harvest was able to recover and reach the same level as in 2017. Expansion of planted area also helped. In particular, red onions and early varieties are

recording growth. Besides Spain, the Netherlands is the most important producer and the most important exporter of onions in Europe.

Besides onions, carrots are the largest in terms of open-field production. Carrot cultivation was also expanded 2019, as the smaller harvest 2018 throughout Europe offered good export opportunities at relatively stable prices. Cabbage, especially white cabbage, also plays an important role in Dutch vegetable production and is primarily intended for export. In terms of growth rates over the past ten years, spinach occupies the top position. Area and production have risen steadily.

The Netherlands is an important producer of glasshouse vegetables. Tomatoes lead the way here, and segmentation is progressing with more snack tomatoes being grown. Planted area for cucumbers has decreased in the last few years, while for peppers it is stable.

The Netherlands is one of the smaller countries in Europe, but thanks to the long coastline with important ports an important hub for European imports and exports. Various fruits and vegetables, from avocados to watermelons, reach Dutch ports to be distributed in Europe. The leading fruit import and export in volume terms is bananas. Oranges, table grapes and avocados from Spain and overseas are also imported in large quantities, while the leading exports are pears, pineapples, table grapes and oranges. Due to grapes, citrus and exotic fruit, the trade balance for fruit is negative.

The country's main vegetable exports are onions and tomatoes. The destinations for these two differ widely: while onions are mainly exported to Africa, Asia and the Americas, tomatoes stay within Europe. More than 50 per cent of all Dutch vegetable exports are produced in the country itself. Therefore, the trade balance is positive. The main destination for fruit and vegetable exports is Germany by far, followed by the UK. The question remains to which position the UK will slip after Brexit, or whether it can defend its place. Among the top-six destinations for Dutch exports, Côte d'Ivoire (onions) has moved up to sixth place and pushed Sweden out of the ranking in 2018.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Pears	374	330	402	379
Apples	317	228	267	285
Strawberries	61	66	65	66
Other Berries	18	17	17	17
Other	16	18	9	14
TOTAL	786	659	760	761

FRESH VEGETABLES	2016	2017	2018	2019p
Onions	1,449	1,780	1,265	1,790
Tomatoes	900	910	910	910
Carrots	601	611	539	620
Cucumbers	370	400	410	390
Peppers	360	365	355	370
Mushrooms	300	300	300	295
White Cabbage	129	138	98	115
Celery	75	101	79	95
Leeks	82	104	82	95
Iceberg Lettuce	89	84	85	87
Spinach	45	60	67	68
Aubergines	54	53	55	55
Brussel Sprouts	47	53	51	52
Chicory	49	55	53	51
Other	362	472	411	237
TOTAL	4,912	5,486	4,760	5,230

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



Unemployment
2.7 per cent

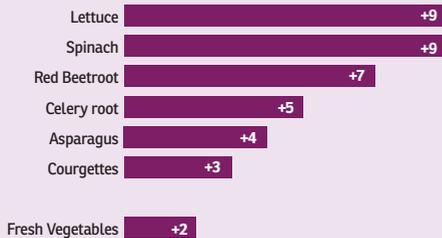


CPI for Food
(2015=100)
103.0



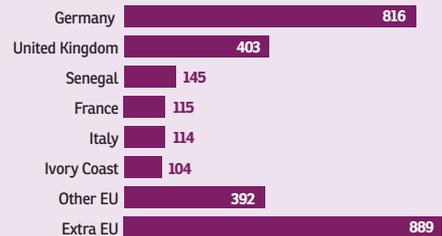
TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2009-2018)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2018)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT ²⁾	2016	2017	2018	2019p
Bananas	875	980	1,141	1,263
Oranges	573	585	589	590
Table Grapes	353	381	413	404
Avocados	247	267	345	332
Pineapples	290	286	321	324
Apples	249	253	305	231
Other	1,717	1,810	1,920	1,806
TOTAL	4,304	4,562	5,034	4,950

FRESH VEGETABLES	2016	2017	2018	2019p
Onions	218	219	248	384
Tomatoes	222	221	230	216
Cucumbers	118	119	117	99
Peppers	92	92	96	91
Other	604	660	710	726
TOTAL	1,254	1,311	1,401	1,516

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT ²⁾	2016	2017	2018	2019p
in Total ¹⁾	3,529	3,789	4,088	3,804
Dutch origin only				
Pears	186	171	156	143
Apples	56	58	44	41
Strawberries	30	32	28	24
Other	3	4	3	7
TOTAL	275	265	231	215

FRESH VEGETABLES	2016	2017	2018	2019p
in Total ¹⁾	4,875	4,919	4,926	4,441
Dutch origin only				
Onions	1,052	1,139	1,059	968
Tomatoes	755	751	750	684
Peppers	307	316	295	275
Cucumbers	254	276	252	215
Cabbage	99	100	95	86
Carrots	52	76	69	54
Other	224	245	226	194
TOTAL	2,743	2,903	2,746	2,476

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT ²⁾	2016	2017	2018	2019p
Import	5,020	5,450	5,866	5,903
Export ¹⁾	5,082	5,478	5,859	5,921
TRADE BALANCE	62	28	-7	18

FRESH VEGETABLES	2016	2017	2018	2019p
Import	1,543	1,663	1,575	1,655
Export ¹⁾	5,163	5,280	5,378	5,265
TRADE BALANCE	3,620	3,617	3,803	3,610



Population
38.0 m



Area
312,700 km²



GDP per Inhabitant
12,920 EUR



GDP Growth
5.1 per cent

POLAND

Poland, the EU's third-largest producer of fruit and vegetables, was not on course to match its 2018 harvest results in 2019. After its fruit harvest set a new record with around 5.8m tonnes a year earlier, it was 40 per cent smaller in 2019 at 3.5m tonnes. There were late frosts in April and May 2019, which resulted in harvest losses for topfruit, berries (with the exception of blueberries) and stonefruit. But apple yields were also lower due to biennial bearing after the huge crop in 2018. The persistent drought and high temperatures last summer also had a negative impact on the crops: the heat meant the strawberry harvest ended prematurely in areas that could not be irrigated. In the case of tree fruit, better-yielding varieties as well as young plantations entering the yield range were able to compensate in part for the losses.

The field vegetable harvest was small for a second year in a row, and even smaller than in 2018. The growing season was even more difficult than in the previous year. The start of the growing season was difficult due to a water deficit in the soil. Extremely high air temperatures and a further lack of precipitation disrupted the crops' development. Conditions did not improve until September. Poland is likely to have harvested a total of 5.24 tonnes of vegetables, 7 per cent less than in 2018.

In addition to supplying the fresh market, a large share of the fruit produced (2.9m tonnes in 2018) is processed. This includes apples into apple juice or concentrate, or berries into fruit preparations, juice or frozen fruit. Over the past ten years, the volume of fruit processed has risen by an average of 5 per cent per year. This development was driven by the further increase in juice and nectar processing. Jam production, on the other hand, stagnated. However, it is expected that the weak harvest in 2019 will result in fewer frozen fruit and vegetables being produced, the same going for apple juice concentrate and canned vegetables. In contrast, Poland is producing more juices this year, including direct juices, as well as tomato products, most of which are made from imported tomato concentrate.

Last season's very strong apple harvest translated into higher exports in the first half of last year. However, exports of stonefruit and most berries (again excluding blueberries) declined in the summer. Even though export prices for most fruits have risen, they will not be able to compensate for the volume losses. Poland imported significantly more vegetables in 2019 due to weak onion harvests in 2018 and 2019. In particular, onions are often imported before being peeled and then re-exported.

In 2018, on average Polish households bought around 100kg of fresh fruit and 95kg of vegetables. While apples, followed by bananas and oranges, are the three most frequently purchased types of fruit in Poland, tomatoes are the most popular vegetable, followed by onions and carrots.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ²⁾	2016	2017	2018	2019p
Apples	4,035	2,870	4,810	2,710
Strawberries	197	178	196	175
Sour Cherries	195	72	201	154
Currants	166	129	165	127
Plums	110	58	121	95
Raspberries	129	105	116	75
Pears	55	40	70	70
Aronia	49	49	49	49
Sweet Cherries	54	20	60	43
Other	58	44	56	45
TOTAL	5,048	3,565	5,844	3,543

FRESH VEGETABLES ³⁾	2016	2017	2018	2019p
Tomatoes	867	898	926	905
Cabbage	1,018	1,011	913	800
Carrots	822	827	726	670
Onions	651	667	563	525
Cucumbers	529	544	538	515
Mushrooms	320	325	330	315
Beetroot	341	336	298	270
Cauliflower	240	238	220	200
Other	1,142	1,184	1,116	1,040
TOTAL	5,930	6,030	5,630	5,240

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; Wapa





Unemployment
2.4 per cent

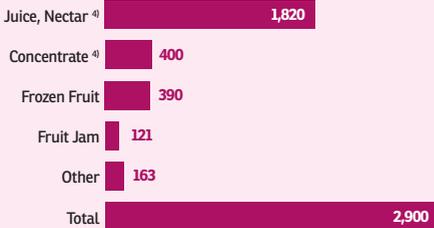


CPI for Food
(2015=100)
102.6



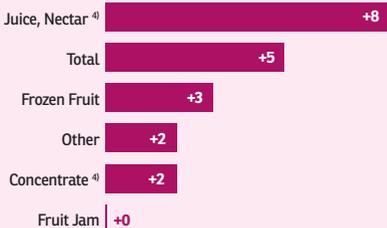
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2018)



PROCESSED FRUIT PRODUCTION

VOLUME GROWTH (% p.a. 2009-2018)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	403	480	487	470
Easy Peelers	172	163	147	220
Oranges	168	166	153	170
Watermelons	134	151	153	145
Lemons	103	120	120	120
Other	494	625	502	900
TOTAL	1,474	1,705	1,562	2,025

FRESH VEGETABLES	2016	2017	2018	2019p
Onions	55	43	58	245
Tomatoes	146	147	153	155
Peppers	53	62	68	70
Cucumbers	54	59	59	65
Other	225	235	241	310
TOTAL	533	546	579	845

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Apples	1,079	1,032	782	1,110
Bananas	41	61	78	75
Pears	49	42	45	60
Easy Peelers	28	25	26	55
Peaches	12	10	11	20
Cider Apples	13	5	13	15
Blueberries	8	10	12	13
Other ¹⁾	129	101	95	77
TOTAL	1,359	1,286	1,062	1,425

FRESH VEGETABLES	2016	2017	2018	2019p
Mushrooms	226	229	231	200
Onions	117	124	145	125
Tomatoes	98	92	88	70
Cabbage	37	52	38	30
Kohlrabi, Kale	50	47	35	30
Peppers	20	19	23	25
Carrots	23	33	22	20
Other	139	134	149	210
TOTAL	710	730	731	710

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	1,122	1,351	1,293	1,445
Export	567	604	581	555
TRADE BALANCE	-555	-747	-712	-890

FRESH VEGETABLES	2016	2017	2018	2019p
Import	509	596	597	769
Export	623	637	670	772
TRADE BALANCE	114	41	73	3



Population
21.6 m



Area
819,900 km²



GDP per Inhabitant
46,940 EUR



GDP Growth
2.1 per cent

NORDIC COUNTRIES

DENMARK, FINLAND, SWEDEN

Due to their climate, possibilities for growing fruit and vegetables are limited in Denmark, Finland and Sweden. At the same time, consumers' purchasing power and willingness to spend money on fruit and vegetables is relatively high, making these countries popular export destinations. This is especially true of Finland, where the growing season is short due to long, cold winters. Denmark and Sweden, on the other hand, benefit more from the positive influence of the Gulf Stream; their winters are less severe, but at the same time the summer months are often only moderately warm. Vegetable production in all three countries combined has tended to remain below 950,000 tonnes, focusing mainly on carrots, onions and white cabbage. There is also a significant greenhouse-grown tomato crop in Finland. Of the three

nations, Sweden is the leading vegetable producer, but without much external exposure – only about 5 per cent is exported. In Denmark, on the other hand, as much as 17 per cent of vegetable production goes for export. Carrots in particular, and here again snack carrots and organic carrots, were exported in increasing quantities until 2017. Recently, however, this development has weakened somewhat.

Fruit production still lags far behind vegetable production. Together, the three countries produce between 106,000 and 130,000 tonnes of fruit per year. The 2019 fruit harvest is in the middle range. Apples account for the largest share of the fruit harvest, but the protected cultivation of strawberries also plays a greater role in all three countries. Fruit exports appear comparatively high in view of the small harvest volume. However, this is due to the fact that some of the imports are re-exported. This is also evident from the fact that bananas are the fruit that Denmark exports in the largest quantities.

The three countries are heavily dependent on imports for both fruit and vegetables. The trade balance is correspondingly negative. In total, the trio have recently imported around 1.39m tonnes of fruit – mainly bananas, oranges and apples. The long-term trend in imports shows that the berry market is also booming in the north. With white currants, blackberries and raspberries, three types of soft fruit are among the fruits and vegetables with the strongest annual increase in import volume. In vegetables, only spinach makes it into the top five in this ranking. Per-capita fruit consumption is around 70kg in Sweden, 68kg in Denmark and 64kg in Finland. Imports of fresh vegetables recently amounted to 695,000 tonnes, dominated by tomatoes, lettuce and cucumbers. There are greater differences than for fruit in the per-capita consumption of vegetables: in Denmark it is around 78kg, in Finland around 70kg and in Sweden only around 50kg.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Denmark	51.6	40.2	51.7	42.0
– Apples	24.0	19.0	24.0	15.0
– Pears	7.9	6.7	6.5	6.6
– Strawberries ²⁾	5.5	4.5	5.8	5.0
Finland	21.4	24.0	25.4	25.8
– Strawberries ²⁾	12.0	12.0	15.5	16.0
– Apples	6.4	6.8	7.2	7.0
Sweden	45.2	41.6	50.7	43.5
– Apples	26.8	22.1	30.6	23.0
– Strawberries ²⁾	15.3	15.7	15.6	15.5
TOTAL	118.2	105.8	127.8	111.3

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Denmark	315.6	331.0	323.6	326.0
– Carrots	117.6	115.8	134.5	130.0
– Onions	69.0	65.0	43.0	61.0
– White Cabbage	23.8	27.6	26.4	28.0
Finland	262.5	254.2	252.9	253.5
– Carrots	73.0	62.5	66.7	65.0
– Tomatoes	40.6	39.4	39.3	40.0
Sweden	372.4	341.6	307.1	334.7
– Carrots	111.6	109.1	92.5	100.0
– Onions	63.0	53.0	45.0	50.0
TOTAL	950.5	926.8	883.6	914.2

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

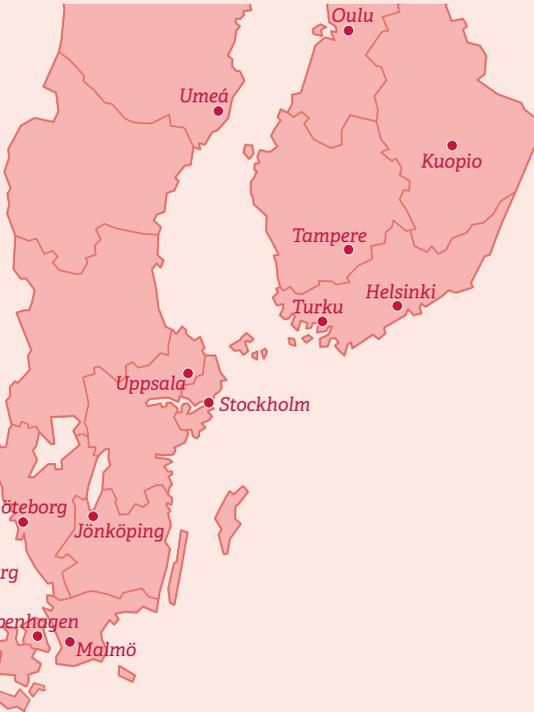




Unemployment
4.3 per cent

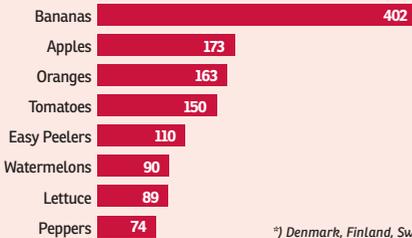


CPI for Food
(2015=100)
103.1



FRUIT AND VEGETABLE IMPORTS 2018

BY NORDIC COUNTRIES^{*)} ('000 tonnes)



^{*)} Denmark, Finland, Sweden.

TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH^{*)} (% p.a. 2009-2018)



Fresh Fruit and Vegetables **+1**

^{*)} Denmark, Finland, Sweden.

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Denmark	372.7	376.2	432.3	398.5
- Bananas	80.3	82.7	96.3	77.0
- Oranges	42.7	37.8	57.9	51.2
- Apples	49.3	48.7	52.8	49.9
Finland	330.9	328.9	329.2	330.2
- Bananas	110.5	114.0	111.8	111.1
- Apples	44.4	43.8	40.7	43.6
Sweden	695.3	706.6	653.2	660.7
- Bananas	201.9	213.6	193.9	192.7
- Oranges	92.9	85.0	72.5	73.2
TOTAL	1,398.9	1,411.7	1,414.7	1,389.4

FRESH VEGETABLES	2016	2017	2018	2019p
Denmark	183.1	189.1	211.7	216.3
- Tomatoes	34.9	33.7	38.1	38.1
- Lettuce	22.6	23.3	24.8	24.6
- Cucumbers	21.3	21.4	24.7	24
Finland	126.6	125.6	134.2	129.5
- Tomatoes	27	24.8	26.1	26.8
- Lettuce	25.8	26	26.1	25.8
Sweden	351.2	347.6	347.2	349.1
- Tomatoes	93.1	83.3	85.9	82.2
- Cucumbers	37.0	37.4	34.5	36.5
TOTAL	660.9	662.3	693.1	694.9

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Denmark	35.7	39.2	44.7	45.6
- Bananas	7.1	9.7	8.2	11.0
- Apples	5.2	4.2	6.9	6.8
Finland	10.1	9.2	8.4	6.2
Sweden	45.3	47.5	56.8	52.6
TOTAL	91.1	95.9	109.9	104.4

FRESH VEGETABLES	2016	2017	2018	2019p
Denmark	57.5	56.0	58.5	54.4
- Carrots	31.0	33.9	29.9	25.9
- Onions	11.4	7.1	8.7	8.1
Finland	0.2	0.6	0.8	1.3
Sweden	21.9	19.7	17.6	17.1
TOTAL	79.6	76.3	76.9	72.8

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	1,547	1,599	1,676	1,548
Export	122	128	130	124
TRADE BALANCE	-1,425	-1,471	-1,546	-1,424

FRESH VEGETABLES	2016	2017	2018	2019p
Import	977	1,026	1,056	1,070
Export	96	114	131	134
TRADE BALANCE	-881	-912	-925	-936



Population
46.9 m



Area
506,000 km²



GDP per Inhabitant
25,730 EUR



GDP Growth
2.4 per cent

SPAIN

In Spain, Europe's largest fruit and vegetable supplier, results in terms of production in 2019 differed depending on the product. At the beginning of the year, the start of the strawberry season was delayed due to bad weather in the main growing region, but higher temperatures eventually meant that production slightly exceeded the previous year's volumes. The 2018/19 citrus season was disappointing, with a large gross harvest characterised by high sorting losses because of small sizes, and met with limited demand due to the mild winter. The new campaign, meanwhile, has been characterised by a sharp decline in volumes. Yields were expected to be smaller due to the previous year's bigger harvest, but in September severe storms brought rain to the south-east of the country. In Valencia, Murcia and Andalusia, the three

largest growing regions, harvest estimates were revised further downwards, with a decline now estimated at 20 per cent.

In April, watermelon harvesting in Almería started a little earlier than usual, and an increase in planted area last year pushed production to a new record volume. The 2018 melon season was very successful in terms of export activity due to the early hot and dry summer in large parts of Europe. Exports were also high last year, but did not reach the record level seen in the previous campaign. Like other large stonefruit producers in Europe, the peach and nectarine harvest in Spain was again higher than in the previous year.

Avocados continue to be a booming product for the Spanish fruit industry. Spain's growing regions are mainly Málaga and Granada. However, in the past few years, planted area has grown mainly in the less important regions of Huelva, Cádiz and the Canary Islands. The development of another on-trend product, persimmons (known locally as kaki), has slowed down a little in recent times. After rapid growth in planted area between 2010 and 2016 – with an annual increase of around 20 per cent – growth rates declined in 2017 and 2018.

Elsewhere, Spain can benefit from strong global demand for berries; raspberry and blueberry exports reached record levels in 2018, and further growth was recorded for 2019. Total fresh fruit exports have recovered in 2019, from the lower level of the previous year.

As for vegetables, certain changes can be noted in the export-oriented cultivation of fruit vegetables. While the area under tomatoes for the fresh market contracted due to increasing competition throughout Europe and problems with diseases, the area for peppers still saw an increase last year. This means that a record 2019/20 pepper harvest remains in sight. Courgette production has also grown strongly in recent years. Spanish onion producers can now look back on two good years of production: in 2018, they bucked the trend at a time when supply was scarce throughout Europe; and in 2019/20 they have continued that level of output, matching high production in other parts of the continent. Increased onion, courgette and pepper exports during the first three quarters of 2019 will help vegetable exports to increase again in 2019.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Oranges	3,655	3,369	3,930	3,275
Easy Peelers	2,343	1,996	2,385	1,900
Watermelons	1,092	1,113	1,092	1,212
Lemons	996	928	1,149	960
Peaches ¹⁾	570	709	623	664
Melons	650	656	664	644
Nectarines	535	719	547	590
Apples	495	496	484	566
Strawberries	378	360	345	352
Other	3,144	2,962	3,025	3,095
TOTAL	13,858	13,308	14,244	13,258

FRESH VEGETABLES ²⁾	2016	2017	2018	2019p
Tomatoes ¹⁾	2,430	2,046	2,070	1,994
Onions	1,450	1,303	1,431	1,600
Peppers ¹⁾	1,075	1,151	1,155	1,294
Lettuce	930	976	935	998
Cucumbers	631	634	644	622
Courgettes	582	587	596	603
Broccoli	479	541	544	540
Carrots	405	390	382	386
Aubergines	243	226	238	231
Other	1,840	1,898	1,874	1,866
TOTAL	10,065	9,752	9,869	10,134

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

Sources: AMI-Informiert.de; DGA; Eurostat; Fepex; Mapama; WAPA



Unemployment
9.9 per cent

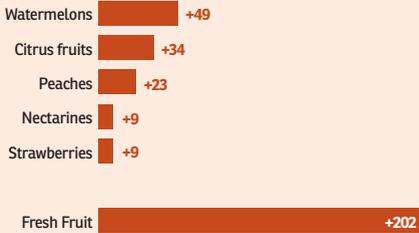


CPI for Food
(2015=100)
103.5



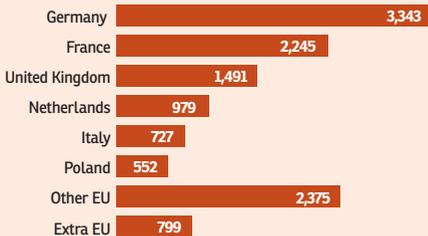
TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2009-2018)



FRUIT AND VEGETABLE EXPORTS 2018

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	285	307	365	351
Apples	223	192	167	197
Oranges	164	174	175	161
Kiwifruit	162	217	182	160
Other	779	816	959	923
TOTAL	1,613	1,706	1,848	1,792

FRESH VEGETABLES ²⁾	2016	2017	2018	2019p
Beans	138	121	144	129
Tomatoes ¹⁾	92	99	110	115
Onions	71	54	87	69
Other	203	307	301	331
TOTAL	504	581	642	644

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Oranges	1,556	1,604	1,528	1,630
Easy Peelers	1,464	1,356	1,369	1,360
Watermelons	719	739	862	710
Lemons	545	689	600	690
Melons	444	441	405	449
Nectarines	419	469	357	415
Peaches	407	454	382	398
Strawberries	311	304	279	293
Kaki	193	215	168	190
Other	1,141	1,202	1,189	1,225
TOTAL	7,199	7,473	7,139	7,360

FRESH VEGETABLES ²⁾	2016	2017	2018	2019p
Tomatoes	908	810	813	790
Peppers	701	689	746	772
Lettuce	743	762	795	758
Cucumbers	632	627	649	673
Brassicas	464	447	486	472
Onions	357	337	353	398
Courgettes	327	320	362	378
Aubergines	153	144	155	154
Garlic	163	166	152	171
Other	615	547	580	586
TOTAL	5,063	4,849	5,091	5,152

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	1,576	1,740	1,951	2,071
Export	7,340	7,437	7,543	7,569
TRADE BALANCE	5,764	5,697	5,592	5,498

FRESH VEGETABLES ²⁾	2016	2017	2018	2019p
Import	520	565	597	633
Export	5,092	5,174	5,161	5,442
TRADE BALANCE	4,572	4,609	4,564	4,809



Population
66.6 m



Area
248,500 km²



GDP per Inhabitant
36,410 EUR



GDP Growth
1.4 per cent

UNITED KINGDOM

In the UK, last year's open-field vegetable harvest recovered from its low level in 2018. In the summer months, weather conditions in large parts of the UK were much more balanced than in the previous year. At the beginning of the growing season, in February, temperatures were comparatively mild, which allowed many open-field crops to be sown early. March saw some rain, so crops developed well. June was very wet towards the middle of the month, but July and August brought warm, sometimes hot days that favoured good plant development with sufficient irrigation. Production of the two largest crops, carrots and onions, was significantly higher than in 2018 and their supply was abundant. This also applied to production of cabbage.

Problems, however, were caused by intense and persistent rainfall from the end of September onwards. As a result, about 25 per cent of the onions were brought into storage under wet – and at times extremely wet – conditions. For carrots, there were difficulties with straw cover where especially wet conditions persisted in large parts of the UK. In December, carrot crops were not well prepared for a possible frost.

Planted area for fruit and vegetables have not shown strong signs of expansion in the past decade. In 2011, vegetable production area reached its highest level, after which it went into a decline. Both fruit (berries) and vegetables saw a slight increase in protected production areas.

In the UK, a trend towards imported vegetables has continued. With a reduced harvest in the hot summer of 2018, onion imports rose sharply over the subsequent 12 months. Onions are the second most important imported vegetable in normal years, but in 2019 they will most likely be number one. Fruit imports increased only slightly with a large 2018 apple harvest resulting in declining imports last spring and summer. The Gala variety dominates UK apple production, accounting for about a third of all fresh apples in 2018, followed by Cox's Orange and Braeburn.

Import and export activities will be affected by Brexit, which, after some lengthy discussion, will seemingly become reality in early 2020. The UK will leave the EU, with a limited period of transition. The effects are still not predictable, as details of future foreign trade regulations are still not decided. In the end, the UK will continue to rely on imports and 'the continent' will remain its most important trading partner – certainly when it comes to fresh fruit and vegetables.

Apples and table grapes accounted for the highest household expenditure in the UK in 2018, followed by tomatoes as a vegetable crop. Strawberries, bananas and easy peelers were ranked four, five and six respectively. In terms of purchased volumes, bananas lead the fruit segment, while carrots are the most bought item in the fresh vegetable segment.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹⁾	2016	2017	2018	2019p
Apples	244	206	219	210
Strawberries	120	128	132	128
Pears	24	28	26	28
Raspberries	16	17	15	16
Blackcurrants	12	14	16	16
Plums	9	8	9	7
Cherries	2	7	4	5
Other Soft Fruit	8	11	11	11
Other	5	4	5	5
TOTAL	440	423	437	426

FRESH VEGETABLES ²⁾	2016	2017	2018	2019p
Carrots	746	887	749	830
Onions	432	454	332	454
Cabbage	232	224	175	210
Peas ¹⁾	157	125	119	121
Lettuce	93	99	92	95
Turnips and Swedes	94	85	76	86
Cauliflower	82	87	88	85
Parsnips	81	90	77	85
Celery	53	53	54	53
Brussel Sprouts	51	52	36	51
Other	265	253	287	272
TOTAL	2,286	2,409	2,085	2,342

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

Sources: AMI-informiert.de; Defra; Eurostat



Unemployment
3.9 per cent

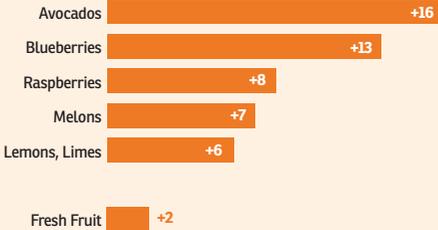


CPI for Food
(2015=100)
104.5



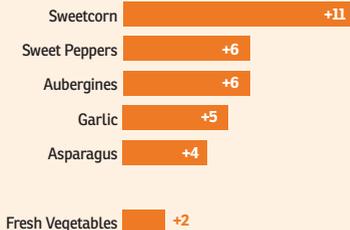
TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2009-2018)



TOP 5 FRESH VEGETABLE IMPORTS

VOLUME GROWTH (% p.a. 2009-2018)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	1,211	1,229	1,137	1,135
Apples	382	525	382	375
Melons	301	305	319	325
Easy Peelers	317	289	286	288
Table Grapes	275	271	273	282
Oranges	292	287	268	265
Pineapples	148	168	160	159
Lemons, Limes	148	154	160	158
Pears	146	133	126	122
Other	627	621	630	644
TOTAL	3,847	3,984	3,741	3,753

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Tomatoes	402	398	411	418
Onions	395	342	402	480
Peppers	208	196	194	204
Lettuce, all	221	192	216	202
Cucumbers	167	160	169	180
Cauliflower/Broccoli	154	136	145	137
Mushrooms	123	126	131	134
Celery	83	73	54	56
Other	615	561	557	587
TOTAL	2,369	2,184	2,279	2,398

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	55	59	29	35
Oranges	30	31	29	36
Apples	17	25	22	21
Other	38	59	77	71
TOTAL	140	174	157	163

FRESH VEGETABLES	2016	2017	2018	2019p
Carrots and Turnips	21	23	29	36
Cauliflower/Broccoli	7	8	7	10
Onions	10	6	6	10
Other	117	92	103	103
TOTAL	155	129	145	159

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2016	2017	2018	2019p
Import	4,252	4,515	4,454	4,550
Export	135	182	182	185
TRADE BALANCE	-4,117	-4,333	-4,272	-4,365

FRESH VEGETABLES	2016	2017	2018	2019p
Import	2,719	2,826	2,906	3,020
Export	128	129	153	165
TRADE BALANCE	-2,591	-2,697	-2,753	-2,855



Population
7.0 m



Area
88,400 km²



GDP per Inhabitant
6,140 EUR



GDP Growth
4.4 per cent

SOUTHEAST EUROPE

SERBIA

In fresh produce terms, Serbia is known mainly for its fruit production, rather than its vegetables. The country's fruit crop amounts to approximately 1.6m tonnes in a normal year and is growing. Total orchard area was 183,000ha in 2018, of which more than half belonged to farms with less than 5ha of orchards. Stonefruit and plums in particular make up a large share of that production, with other important products being apples, melons, sour cherries and raspberries. According to the national Statistical Office, tree fruit production increased last year, dominated by apples (+9 per cent) and plums (+30 per cent), the most important fruit crop. These occupy 40 per cent of Serbia's orchard area and are good for almost one-third of national fruit production. 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. According to AMI estimates, the total fruit crop reached 1.8m tonnes in 2019.

Although plums play a major role in production, however, they are less of a factor in foreign trade. Exports to central Europe depend on the crop in Serbia itself and the corresponding situation in importing countries. Fresh fruit exports are dominated by apples, with Russia the most important destination. Back in 2013, apples made up 51 per cent of all fruit exports, but in 2019 the figure was 63 per cent. Russia was always an important export destination, but after it banned imports from the EU, its share of Serbian exports grew rapidly. In 2018, 74 per cent of all Serbia's fresh fruit exports went to Russia.

Serbia is one of the world's leading berry producers – most notably raspberries, the majority of which are used for processing and shipped in large volume as frozen fruit. Germany is the most important destination, followed by France and Belgium. Russia features less when it comes to frozen fruit exports. Exports of fresh raspberries are still of limited importance (7,000 tonnes in 2018) and are mostly used for processing in destination countries. Raspberry production has come under pressure in the last few years, as other players in the world market increased production, pushing down prices for frozen. A shift towards potentially more valuable fresh production for European retail seems like a logical step, therefore; and because Serbia is in Europe, it has a short distance to travel to reach the EU. However, it is a completely different business requiring sophisticated logistics, something which is difficult to organise with so many smaller farmers. Nevertheless, it is possible and there is a huge potential. A shift towards protected cultivation would benefit fresh raspberry exports. Plus there is also an expanding production base for blackberries.

Together with Poland, Serbia is also a major producer of sour cherries in Europe. Like raspberries, they are mainly exported as frozen fruit and used for processing in the countries of destination. In this case, the fresh market offers no viable alternative.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Plums	463	331	430	558
Apples	328	379	460	499
Melons	208	247	199	220
Raspberries	62	109	127	120
Sour Cherries	81	92	128	97
Peaches, Nectarines	95	81	74	90
Pears	64	52	54	60
Apricots	24	41	25	40
Strawberries	23	30	22	30
Other	69	113	97	106
TOTAL	1,416	1,475	1,616	1,820

FRESH VEGETABLES	2016	2017	2018	2019p
Brassicas	290	268	209	250
Peppers	228	199	135	170
Tomatoes	160	171	132	160
Cucumbers	55	58	43	50
Carrots	49	31	22	35
Onions	49	33	28	35
Leguminous crops	41	38	29	35
Other	53	41	33	45
TOTAL	925	839	631	780

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



Unemployment
13.5 per cent



CPI for Food
(2015=100)
106.8



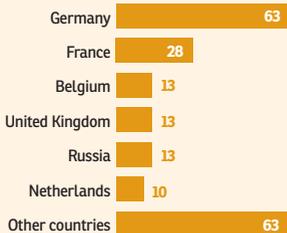
FRESH FRUIT EXPORTS 2018

BY DESTINATION ('000 tonnes)



FROZEN FRUIT EXPORTS 2018

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bananas	58	66	76	80
Apples	78	66	36	40
Oranges	47	35	42	40
Easy Peelers	27	22	28	26
Other	74	81	69	69
TOTAL	284	270	251	255

FRESH VEGETABLES	2016	2017	2018	2019p
Tomatoes	29	28	32	32
Brassicas	11	10	9	10
Onions	8	5	14	10
Other	49	57	37	48
TOTAL	97	100	92	100

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017p	2018	2019p
Apples	232	176	145	180
Plums	24	15	19	20
Sour Cherries	12	13	11	12
Strawberries	10	11	10	11
Sweet Cherries	6	9	5	6
Other	60	94	46	71
TOTAL	344	318	236	300

FRESH VEGETABLES	2016	2017p	2018	2019p
Onions	16	17	20	20
Cucumbers, Gherkins	12	18	17	17
Peppers	13	18	14	15
Tomatoes	12	11	11	12
Brassicas	5	4	7	7
Other	25	27	30	34
TOTAL	83	95	99	105

FROZEN PRODUCTS	2016	2017p	2018	2019p
Frozen Vegetables	50	49	59	55
Raspberries	108	124	135	135
Sour Cherries	56	77	62	65
Other Frozen Fruit	7	5	6	6
Frozen Fruit	171	206	203	206

TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2016	2017	2018	2019p
Import	97	105	122	130
Export	198	225	176	200
TRADE BALANCE	101	120	54	70

FRESH VEGETABLES	2016	2017	2018	2019p
Import	33	37	47	50
Export	30	40	42	45
TRADE BALANCE	-3	3	-5	-5



SOUTHEAST EUROPE

ALBANIA, BOSNIA-HERZEGOVINA, KOSOVO, N

The smaller countries in the western Balkan region – Bosnia and Herzegovina, Kosovo, Albania and Macedonia – have a combined population of 10.2m inhabitants across an area of 12ha, making them comparable to Greece in terms of people and size. While GDP growth in the region is impressive at more than 3 per cent, double-digit unemployment rates continue to plague each of these countries. While vegetable production is higher than fruit production, foreign trade concentrates on developing the latter.

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.

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: back in 2017, small plum crops in Germany and Austria saw exports rise, but then they fell back to normal levels a year later. The major destination for apple exports tends to be Russia: it took 13,000 tonnes in 2017 but then fell to less than 4,000 tonnes in 2018 due to a low crop, only to recover again in 2019. 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. 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 apples are the most important import categories.

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 several sources, raspberry production increased rapidly in the last few years, although the absolute level is still low and was probably below 10,000 tonnes 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. Melons play a prominent role in the country's fruit production, meanwhile, with apples, plums and citrus also key.

Macedonia is the region's most important fruit and vegetable producer and exporter, with notable diversification in terms of its apple exports. Russia took only 9,000 tonnes of apples in 2018, its share diminished since 2016. Melon exports are mainly watermelons, while cabbage exports are mainly early white cabbage and Chinese varieties, shipped to neighbouring and eastern European countries. Due to the shorter crop in western Europe last year, Macedonia was also able to export more cabbage to that region in 2019.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bosnia-Herzegovina	330	233	454	410
– Plums	132	110	190	150
– Apples	62	52	113	100
– Raspberries	22	23	27	25
Kosovo	90	71	85	80
Albania	544	598	537	550
– Melons	284	295	281	290
– Apples	102	96	108	100
North Macedonia	374	254	398	380
– Melons	140	121	132	130
– Apples	108	44	140	120

FRESH VEGETABLES	2016	2017	2018	2019p
Bosnia-Herzegovina	330	263	270	270
– Cabbage	80	59	70	70
– Tomatoes	57	46	44	45
Kosovo	117	114	129	120
Albania	832	785	854	850
– Tomatoes	284	285	288	290
– Onions	99	100	99	100
– Cucumbers	94	95	120	120
North Macedonia	670	649	661	660
– Tomatoes	162	160	162	160
– Onions	61	56	59	60

1) Albania, Bosnia-Herzegovina and North Macedonia.

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



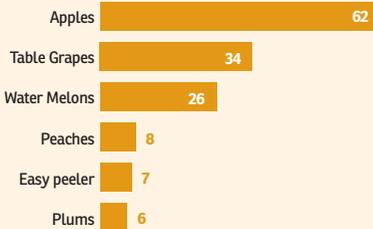
Unemployment¹⁾
18.8 per cent

NORTH MACEDONIA



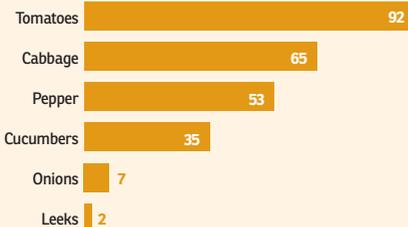
FRESH FRUIT EXPORTS 2018

ALBANIA, BOSNIA, NORTH MACEDONIA ('000 TONNES)



FROZEN VEGETABLE EXPORTS 2018

ALBANIA, BOSNIA, NORTH MACEDONIA ('000 TONNES)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bosnia-Herzegovina	153	164	143	160
- Bananas	48	50	53	55
- Apples	29	38	21	30
Kosovo	33	35	32	32
Albania	78	33	64	70
- Bananas	21	23	13	20
North Macedonia	69	62	68	70
- Bananas	23	24	26	27

FRESH VEGETABLES	2014	2017	2018	2019p
Bosnia-Herzegovina	55	55	59	60
- Tomatoes	19	17	19	20
- Peppers	13	12	12	13
- Onions	7	8	10	10
Kosovo	23	20	22	25
Albania	12	8	7	8
North Macedonia	14	17	19	20

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Bosnia-Herzegovina	31	38	26	30
- Apples	14	16	8	15
Kosovo	4	4	4	4
Albania	43	62	32	50
- Water Melons	25	36	19	25
North Macedonia	167	105	110	120
- Apples	82	41	50	55
- Table Grapes	39	28	32	35

FRESH VEGETABLES	2014	2017	2018	2019p
Bosnia-Herzegovina	16	12	8	10
Kosovo	5	6	6	6
Albania	97	91	107	110
- Tomatoes	64	70	70	72
- Cucumbers	15	21	17	20
North Macedonia	141	125	124	125
- Cabbage	68	61	59	65
- Peppers	29	23	26	26
- Tomatoes	24	25	21	23

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

ALBANIA	2016	2017	2018	2019p
Import	45	38	44	45
Export	44	59	61	65
TRADE BALANCE	-1	21	17	20

NORTH MACEDONIA	2016	2017	2018	2019p
Import	37	40	46	50
Export	95	88	85	85
TRADE BALANCE	58	48	39	35



Population
4.0 m (MDA)
44.0 m (UKR)



Area
33,800 km² (MDA)
603,500 km² (UKR)



GDP per Inhabitant
2,860 EUR (MDA)
2,780 EUR (UKR)



GDP Growth
4.0 per cent (MDA)
3.3 per cent (UKR)

EASTERN EUROPE

The Republic of **Moldova** covers just 34,000m², but remains a strong player in eastern Europe's berry market as well as one of the region's largest stonefruit exporters. Moldovan production of fruits, berries and nuts has been rapidly growing and almost doubled since 2015. For comparison, fruit and berry production totalled just 560,000 tonnes in 2015 and reached 1m tonnes in 2018, with apples and plums the top produced fruits (67 per cent and 13 per cent, respectively).

Grapes are another top crop of Moldova, and the country is just behind Romania in grape production in eastern Europe. Moldova has been increasing its grape production by 5-10 per cent per year.

Despite its relatively small fruit production, Moldovan growers have succeeded in holding their position in the global area. In 2018, the country exported about 200,000 tonnes of apples, almost a third of domestically produced volumes.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹⁾	2016	2017	2018	2019p
Moldova	669	756	1.000	750
– Apples	412	487	665	410
– Plums	100	93	133	90
– Grapes ²⁾	87	109	126	100
Ukraine	2.658	2.562	3.127	2.711
– Apples	1.099	1.076	1.462	1.074
– Watermelons	468	351	397	418
– Sour Cherries	156	172	219	216
– Plums	178	200	198	192
– Grapes ²⁾	177	190	186	187

FRESH VEGETABLES ¹⁾	2016	2017	2018	2019p
Moldova	281	297	270	280
– Tomatoes	55	62	52	55
– Onions	58	54	44	55
– Squashes	39	40	44	40
Ukraine	9.430	9.302	9.456	9.555
– Tomatoes	2.230	2.267	2.324	2.301
– Brassicas	1.643	1.655	1.638	1.619
– Cucumbers	949	896	985	973
– Onions	1.015	977	884	980
– Carrots	877	839	842	870

1) Including fruits for processing. 2) Excluding grapes grown for wine industry. 3) Excluding potatoes.

Sources: AMI-informiert.de; Comtrade; Fruit-Inform

MOLDOVA, UKRAINE

The year 2015 could be regarded as a turning point in the development of Moldovan fruit exports; Russia, its main trading partner, introduced a ban on imports due to alleged re-exports of apples and other fruits from the EU. However, this embargo only affected stonefruit exports, which went to EU members. In the meantime, apples were still exported to the Russian Federation even when the ban was in effect, with Moldova shipping its fruit via third countries instead.

Vegetable production is less popular in Moldova, and the country grows just 270,000-300,000 tonnes of vegetables annually. In most cases, Moldova is a net importer.

Ukraine is one of the largest fruit and vegetable growers in eastern Europe. It ranks third in apple production in the region, after Poland and Russia, and is also among the global top three producers of sour cherries and currants.

Ukraine's vegetable industry focuses on cabbage, carrots, onions and beetroot. These crops might be traditional in the region, but exports are generally too low unless there is a lack of domestic production in neighbouring countries. Imports are also occasional. Despite being one of eastern Europe's leading open-field tomato producers, Ukraine is a net importer of greenhouse tomatoes as well as other greenhouse vegetables.

A key driver in Ukraine's development as an active player in the global fruit and vegetable market was the ban on imports that Russia imposed on its neighbour in 2014. The Russian Federation had previously consumed up to 90 per cent of Ukraine's annual fresh produce exports, so the embargo forced Ukrainian growers and traders to seek alternative clients. They now reportedly have a variety of European and Asian countries among their export markets. In particular, Turkey and Iraq were the top importers of Ukrainian apples in 2018/19, despite importing almost nothing just a few years previously.

Unlike the global fresh produce market, where Ukraine is only building its reputation, the processed fruit and vegetable industry has already become the country's strong point throughout the world.



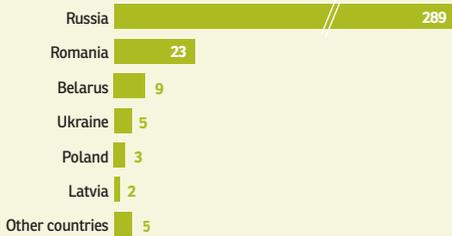


Unemployment
4.5 per cent (MDA)
7.8 per cent (UKR)



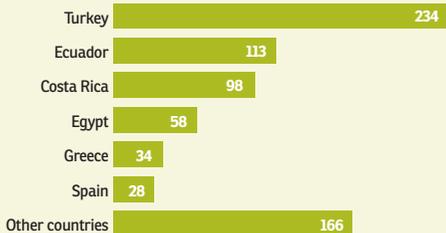
MOLDOVA – FRESH FRUIT EXPORTS

2018 BY DESTINATION ('000 tonnes)



UKRAINE – FRESH FRUIT IMPORTS

2018 BY ORIGIN ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Moldova	46	40	57	55
– Bananas	12	13	14	15
– Easy Peelers	10	9	12	12
Ukraine	636	686	730	750
– Bananas	192	238	251	270
– Easy Peelers	145	133	165	160
– Oranges	81	70	92	90
– Lemons	46	46	52	50
– Persimmons	21	29	33	35

FRESH VEGETABLES ³⁾	2016	2017	2018	2019p
Moldova	55	59	60	62
– Tomatoes	12	8	12	12
– Peppers	4	1	11	11
Ukraine	89	78	125	120
– Tomatoes	37	35	55	50
– Onions	3	6	15	15
– Cucumbers	9	9	13	10

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Moldova	238	371	335	350
– Apples	131	222	216	220
– Table Grapes	51	80	48	50
– Plums	36	49	45	40
– Sweet Cherries	4	8	12	10
Ukraine	44	60	72	80
– Apples	14	23	42	50
– Watermelons	21	18	18	20

FRESH VEGETABLES ³⁾	2016	2017	2018	2019p
Moldova	5	7	3	5
– Onions	1	5	1	2
Ukraine	65	51	54	55
– Onions	14	16	21	20
– Tomatoes	35	21	15	15
– Cabbage	3	4	8	7
– Cucumbers	3	4	4	4

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

MOLDOVA	2016	2017	2018	2019p
Import	49	53	74	75
Export	58	102	91	100
TRADE BALANCE	9	49	17	25

UKRAINE	2016	2017	2018	2019p
Import	443	437	501	550
Export	38	50	51	65
TRADE BALANCE	-405	-387	-450	-485



Population
4.0 m (GEO)
33.0 m (UZB)



Area
69,700 km² (GEO)
448,800 km² (UZB)



GDP per Inhabitant
3,900 EUR (GEO)
1,380 EUR (UZB)



GDP Growth
4.7 per cent (GEO)
5.1 per cent (UZB)

EASTERN EUROPE

Georgia is a mountainous country, and this fact has a significant impact on both its agriculture overall and its fresh produce industry in particular. Only 2 per cent of the country's total territory, in fact, is devoted to fruit and vegetable growing.

In 2018, Georgia produced around 200,000 tonnes of fruit (including berries but excluding grapes and citrus). That production was concentrated in three regions: Shida Kartli, which accounts for 48 per cent of total production; and Kakheti and Samegrelo-Zemo Svaneti, which produced another 18 per cent and 11 per cent respectively. Georgian topfruit exports are insignificant, but its stonefruit sales to other countries have been growing each year. In 2018, they reached 13,000 tonnes, against just 3,000 tonnes in 2015. Russia traditionally consumes at least 70 per cent of Georgia's total exports.

Adjara is Georgia's main citrus-growing region thanks to its favourable climate, producing about 60,000 tonnes

GEORGIA, UZBEKISTAN

of easy peelers and 2,000 tonnes of lemons each year. At least half of these volumes are exported, mainly to Russia, Ukraine and Armenia.

Georgia is also a grape country. Its total production exceeds cumulative harvested volumes of other fruits and berries (including citrus) and continues to grow actively – reaching at least a four-year high in 2018 at 260,000 tonnes. However, these volumes are used mostly by processors for production of wines and traditional spirits.

Unlike fruits and berries, Georgian vegetable production cannot satisfy domestic demand. Georgia is also an active importer of cabbage, carrots, onions and beetroot.

Uzbekistan is the centre of fruit and vegetable production in Central Asia, producing more than half of total harvested volumes in the region thanks to its favourable climate, sunny summer and mild winter.

Uzbekistan grows about 6m tonnes of fruits and berries per annum, with grapes as the main crop. In 2018, Uzbek growers produced about 1.6m tonnes of grapes. Apples and watermelons are important crops as well, and their production totals around 1m and 900,000 tonnes respectively each year. In addition, Uzbekistan is the second-largest grower of apricots and the fourth-largest for sweet cherries worldwide.

Unlike fruit, vegetable production shows a negative trend. For comparison, vegetable output in Uzbekistan barely exceeded 9m tonnes in 2018, while a year before it had totalled more than 10m tonnes. Tomatoes account for about 25 per cent of total harvested volumes, and their production went down by about 8 per cent in the period 2016-2018.

Nevertheless, Uzbekistan is the second-largest carrot grower worldwide, with only China producing more. The country annually grows about 2-2.2m tonnes of carrots, which are consumed fresh or processed inside the country. Carrot exports did not exceed 30,000 tonnes before 2018.

It should come as no surprise that Uzbekistan is the main exporter in the Central Asia region. Uzbek exporters sell about 130,000 tonnes of table grapes annually, and the country is an important player in stonefruit exports as well. Kazakhstan, Russia and Kyrgyzstan are the leading importers of fresh fruit from Uzbekistan.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹⁾	2016	2017	2018	2019p
Georgia	297	235	308	280
– Apples	65	20	83	60
– Easy Peelers	60	55	62	55
– Watermelons	60	68	57	65
Uzbekistan	.	6.272	6.035	6.100
– Grapes	1.570	1.626	1.590	1.600
– Apples	1.034	1.029	1.130	1.100
– Watermelons	928	975	876	880
– Melons	657	691	619	650
– Apricots	570	533	494	490

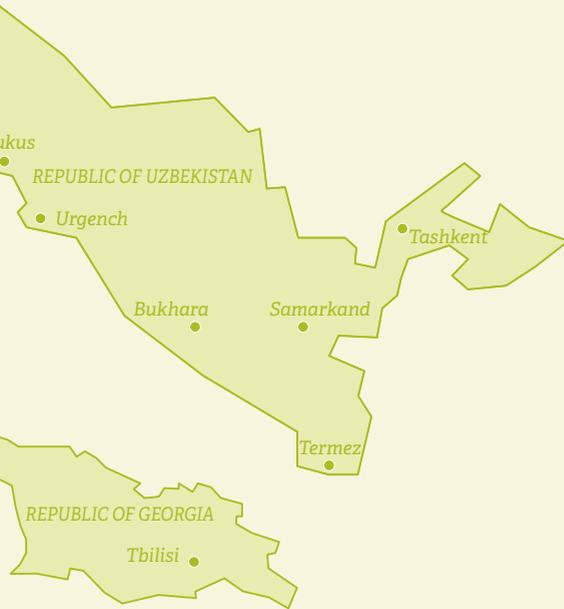
FRESH VEGETABLES ²⁾	2016	2017	2018	2019p
Georgia	145	129	147	140
– Tomatoes	54	50	52	55
– Cucumbers	19	23	33	30
– Brassicas	20	17	19	20
Uzbekistan	.	10.220	9.172	10.000
– Tomatoes	2.499	2.455	2.284	2.400
– Carrots	2.137	2.250	2.185	2.200
– Onions	1.115	995	1.464	1.500
– Cucumbers	822	814	857	850
– Brassicas	933	904	743	800

1) Including fruits for processing. 2) Excluding potatoes, including vegetables grown for processing. 3) Excluding potatoes.

Sources: AMI-informiert.de; Comtrade; Fruit-Inform

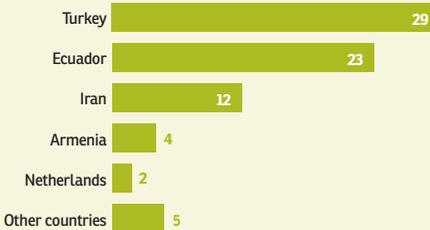


Unemployment
12.7 per cent (GEO)
6.9 per cent (UZB)



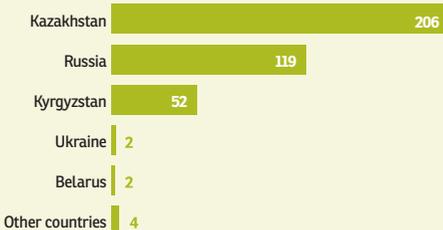
GEORGIA – FRESH FRUIT IMPORTS

2018 BY ORIGIN ('000 tonnes)



UZBEKISTAN – FRESH FRUIT EXPORTS

2018 BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Georgia	56	59	74	75
– Bananas	17	23	26	30
– Apples	12	6	13	10
– Oranges	8	7	9	10
– Watermelons	3	4	5	5
– Pomegranates	3	4	4	4
Uzbekistan	8	12	22	20
– Easy Peelers	1	2	8	8
– Bananas	2	4	5	5

FRESH VEGETABLES ³⁾	2016	2017	2018	2019p
Georgia	72	70	79	80
– Onions	21	18	27	30
– Tomatoes	22	18	20	20
– Cucumbers	9	8	8	9
– Aubergines	7	8	7	8
Uzbekistan	10	26	1	10
– Onions	10	23	0	5

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2016	2017	2018	2019p
Georgia	43	46	58	60
– Easy Peelers	27	24	30	30
– Peaches/Nectarines	6	11	13	15
Uzbekistan	325	355	386	380
– Grapes	96	136	135	140
– Peaches/Nectarines	44	43	64	60
– Persimmons	62	69	51	50
– Apricots	50	23	43	40

FRESH VEGETABLES ³⁾	2016	2017	2018	2019p
Georgia	10	10	11	10
– Tomatoes	3	4	5	5
Uzbekistan	192	233	440	420
– Onions	46	27	86	80
– Cabbage	32	38	84	80
– Carrots	13	28	67	65
– Tomatoes	41	58	60	60

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

GEORGIA	2016	2017	2018	2019p
Import	63	61	69	70
Export	25	30	38	40
TRADE BALANCE	-38	-31	-31	-30

UZBEKISTAN	2016	2017	2018	2019p
Import	5	10	11	15
Export	308	357	495	380
TRADE BALANCE	303	347	484	365

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