FRUIT LOGISTICA

FRUIT LOGISTICA 2026

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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.

In cooperation with:
FRUITNET

EUROPEAN STATISTICS HANDBOOK

Contents

Another year full of challenges

When discussing fruit and vegetable markets, it is almost impossible to avoid addressing weather conditions. Extreme weather events often disrupt cultivation plans and marketing schedules, leading to more frequent and pronounced price fluctuations than for other products. For industry experts this is normal, but for outsiders, including consumers, it is not always understandable. Open and realistic communication with those consumers can foster better understanding.

In recent years, extreme weather events have increased in both frequency and intensity. In 2025, spring frosts had a significant impact on fruit and vegetable markets, particularly in south-east Europe, causing substantial yield losses. Later in the season, heat, drought, heavy rainfall and flooding created further challenges. While these events are often localised, the wider market can compensate. This makes it essential for trade to avoid one-dimensional supply chains and adapt quickly to alternative sources.

Beyond weather, 2025 was shaped by armed conflicts, political and economic uncertainty, and polarising political figures. Although fruit and vegetable demand has not declined, signs of more cautious consumer behaviour are emerging. Ultimately, this could present a challenge for all of us.

Currently, there are indications that the market at the consumer level is developing in two directions. There is a customer base for both the premium segment with higher prices and the entry-level price segment. In between, it is likely to become challenging if neither the price nor the quality, nor a specific promise or compelling story, represents an outstanding feature of the offering. If a product is interchangeable for the consumer, the price will influence the purchasing decision. However, if the quality, the story behind the product, or another feature is convincing, there seems to be a certain willingness to pay.

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Population 450.4 m

Area 4,101,400 km²

GDP per Inhabitant 39,950 EUR

GDP Growth 0.5 per cent

Unemployment 3.9 per cent

CPI for Food (2015=100) 129.7

EUROPEAN UNION

The frequency and intensity of extreme weather events are increasing, as 2025 once again clearly demonstrated. During those 12 months, World Weather Attribution reported a total of 157 extreme weather events around the globe. Those are classified as extreme based primarily on an assessment of the humanitarian impact of droughts, frost, heavy rainfall, and similar events. For fruit and vegetable production, even significantly smaller events often have massive consequences.

The winter of 2024/2025 was initially uneventful. January was slightly drier than usual in many EU countries, with exceptions in parts of Ireland, UK, France, and the western Iberian Peninsula, where heavy rainfall led to flooding. However, January was significantly warmer than the multi-year reference period across almost the entire region. Subsequent months were also frequently warmer than usual, leading to an early onset of fruit blossoms, which made them vulnerable to spring frosts. These frosts occurred in early April 2025, with temperatures dropping below freezing, particularly in south-east Europe. Hungary, Romania, Bulgaria, and south-east Germany were especially affected. Later in the spring, northern Spain, France, and Romania experienced storms accompanied by heavy rainfall. Meanwhile, other countries like Poland, Sweden, parts of the Benelux region, and France faced a lack of rainfall and water scarcity early in the year.

The summer brought a mix of extreme summer droughts with heatwaves and severe storms with heavy rainfall and hail, causing flooding in Bulgaria and Germany. In autumn and winter, storms with hail caused damage in France, central Europe, and parts of Spain in late December.

The fruit harvest in the EU-27 countries amounted to 41.96 mn tonnes in 2025, about 3 per cent lower than the previous year, representing a shortfall of approximately 1.3 mn tonnes compared with 2024. Overall, frost damage to apples, pears, and stonefruit in south-east Europe was largely offset by higher yields in other fruit types. For instance, watermelon and sweet melon harvests exceeded the previous year's levels across Europe. Apples, by far the largest chunk of Europe's fruit harvest, were estimated at around the same level as the previous year during Prognosfruit. Significantly higher yields in Austria, Belgium, Germany, and the Netherlands contrasted with lower yields in frost-affected countries such as Croatia, Greece, Hungary, and Spain. In retrospect, the initial estimate likely represented the lower boundary of the actual harvest volume, as many varieties experienced late fruit size growth. In countries with large apple harvests, producer prices came under pressure at the start of the 2025/26 marketing season. It remains to be seen later in the season whether and what additional sales opportunities might arise, as countries with deficient harvests will need to meet their demand elsewhere.

Weather conditions also led to a smaller citrus fruit harvest in 2025 compared with the previous year. The same applies to table grapes and stonefruit, with cherries, apricots, and plums – particularly affected by frosts – ranking outside the ten most significant fruit types in

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PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Apples	11,936	11,514	10,468	10,455
Oranges	5,881	5,721	5,971	5,601
Watermelons	2,686	2,778	2,995	3,115
Easy peelers	2,956	3,007	3,020	2,778
Peaches	2,299	2,203	2,385	2,257
Melons	1,624	1,806	1,927	2,004
Pears	2,028	1,706	1,762	1,787
Table grapes	1,676	1,420	1,695	1,407
Nectarines	961	1,097	1,195	1,169
Other	10,771	11,480	11,828	11,386
TOTAL	**42,817**	**42,731**	**43,247**	**41,960**

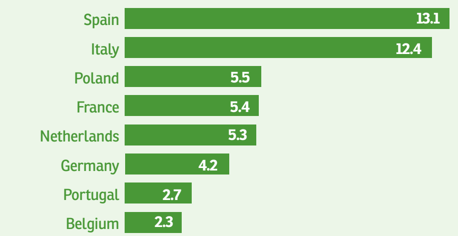
FRESH VEGETABLES [1]	2022	2023	2024	2025p
Tomatoes [2]	15,551	15,995	16,902	15,687
Onions, dry	6,232	6,508	7,053	7,342
Carrots	4,413	4,383	4,730	4,584
Peppers	3,110	2,840	2,961	2,999
Cabbage	2,694	2,670	2,628	2,838
Cucumbers	2,412	2,399	2,431	2,452
Lettuce	2,273	2,173	2,243	2,319
Cauliflower	1,969	1,926	1,957	1,899
Courgettes	1,596	1,560	1,601	1,604
Other	15,904	15,031	15,784	16,398
TOTAL	**56,154**	**55,484**	**58,290**	**58,121**

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

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

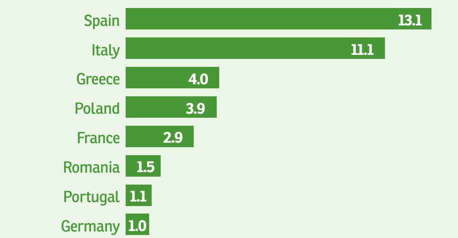
TOP 8 VEGETABLE PRODUCERS 2024 [3]

(million tonnes)



TOP 8 FRUIT PRODUCERS 2024

(million tonnes)



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Spain	12,073	13,255	13,410	13,308
Italy	10,732	10,407	11,375	10,600
Poland	5,363	4,924	4,214	4,600
Greece	3,775	3,371	3,902	3,665
France	3,057	3,233	3,238	3,243
Germany	1,384	1,241	1,153	1,304
Portugal	1,323	1,300	1,342	1,273
Romania	1,674	1,656	1,526	1,066
Netherlands	736	696	636	728
Belgium	649	648	490	605
Hungary	678	816	777	389
Bulgaria	343	308	381	267
Austria	237	191	145	239
Croatia	155	163	170	160
Czechia	167	124	52	128
Cyprus	111	103	104	106
Slovenia	67	57	73	49
Sweden	50	51	48	49
Slovakia	43	38	47	43
Denmark	43	33	39	42
Ireland	31	29	29	30
Lithuania	67	38	46	16
Other EU	60	48	50	51
TOTAL	**42,817**	**42,731**	**43,247**	**41,960**

FRESH VEGETABLES [3]	2022	2023	2024	2025p
Italy	12,557	12,048	12,762	13,000
Spain	12,336	11,975	13,145	12,493
France	5,733	5,667	5,821	5,912
Netherlands	4,959	5,066	5,400	5,690
Poland	5,443	5,165	5,163	5,473
Germany	3,846	4,016	4,256	4,290
Portugal	2,397	2,771	2,734	2,450
Belgium	1,661	1,655	1,858	1,730
Greece	1,612	1,476	1,585	1,508
Hungary	1,120	1,300	1,216	1,140
Romania	1,255	1,198	1,024	1,100
Austria	674	651	668	727
Sweden	385	369	414	420
Bulgaria	352	360	367	338
Finland	286	266	297	294
Denmark	255	248	273	270
Czechia	246	289	263	266
Lithuania	259	213	273	260
Ireland	222	210	222	217
Croatia	131	128	131	133
Slovakia	130	139	136	129
Slovenia	90	74	84	85
Other EU	206	200	197	195
TOTAL	**56,154**	**55,484**	**58,290**	**58,121**

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EUROPEAN UNION

the EU by volume. The shortfall for certain fruit categories led to an increase in average producer prices. While an analysis of the entire EU-27 without distinguishing by fruit type is only partially meaningful, it serves as an indicator of price trends at the producer level. The agricultural product price index, with 2020 as the base year, rose to 145 points for the fruit category, 19 points higher than in 2024.

The impact of weather on vegetable harvests was significantly less pronounced than for fruits. A total of approximately 58.12 mn tonnes of vegetables were harvested across Europe, only 0.3 per cent or 169,000 tonnes less than the previous year. For the first time, this year's report includes the production of tomatoes for processing, resulting in higher reported harvest volumes for tomatoes and vegetables overall compared to previous publications. Following a very large tomato harvest in 2024, about 1.2 mn tonnes were missing compared to the previous year. However, this shortfall was offset by higher yields in other vegetable types, particularly onions and cabbage. Late plantings of cabbage, carrots, and other autumn and storage vegetables often gained weight late in the season. Additionally, significantly larger quantities were harvested in the 'other vegetables' category compared with the previous year. Unlike for fruits, vegetable producers were unable to achieve higher prices in most parts of the season. This is also reflected in the agricultural product price index, which reached 134 points in 2025, four points lower than the previous year.

After a significant increase in input costs, particularly for fertilisers, following the Ukraine war, the situation for production operations in Europe slightly eased in 2024. However, 2025 saw a slight rise in production input costs again. The agricultural input price index increased by one point to 132 points (2020 = 100). This rise was primarily driven by fertilisers, with the price index increasing by eight points against the previous year. Additionally, higher expenses were incurred for the procurement and maintenance of machinery and equipment. Contrastingly, energy and plant protection products were slightly cheaper. Nevertheless, the increase in production costs, including rising wages, remains a challenge for production, especially when, as in 2025 for vegetables, producer prices barely or did not increase at all.

Consumer living costs in the EU-27 countries continued to rise. Preliminary data indicate that food contributed disproportionately to the increase in living

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IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	3,182	3,224	3,220	3,018
Apples	1,781	1,768	1,853	1,661
Oranges	1,770	1,626	1,607	1,595
Watermelons	1,223	1,327	1,417	1,466
Easy peelers	1,403	1,286	1,403	1,280
Table grapes	985	920	935	862
Lemons	791	781	812	751
Avocados	582	619	657	672
Pears	723	729	692	620
Other	4,860	4,844	4,904	4,772
TOTAL	17,300	17,124	17,500	16,698

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Tomatoes	1,972	2,041	2,194	2,028
Cucumbers	1,119	1,252	1,312	1,282
Onions	1,220	1,181	1,325	1,217
Lettuce	1,131	1,125	1,153	1,099
Peppers	1,076	1,039	1,100	1,071
Carrots	903	918	1,036	927
Courgettes	388	422	433	409
Cauliflower	396	351	408	354
Mushrooms	294	291	298	272
Other	2,967	2,966	3,119	2,915
TOTAL	11,465	11,586	12,376	11,573

EXPORTS – INTRA EU

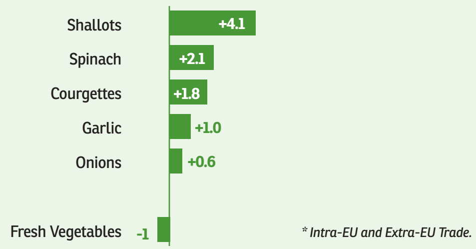
VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	3,002	3,044	3,009	2,757
Oranges	2,006	1,857	1,796	1,764
Apples	1,684	1,723	1,813	1,633
Easy peelers	1,457	1,355	1,454	1,355
Other	9,206	9,079	9,456	9,295
TOTAL	17,354	17,058	17,528	16,805

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Tomatoes	2,175	2,198	2,365	2,115
Onions	1,189	1,281	1,392	1,336
Lettuce	1,189	1,195	1,266	1,164
Peppers	1,112	1,086	1,144	1,103
Other	6,153	6,330	6,661	6,250
TOTAL	11,819	12,090	12,827	11,968

TOP 5 FRESH VEGETABLE IMPORTS*

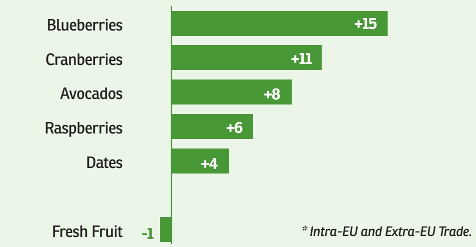
VOLUME GROWTH (% p.a. 2015-2024)



* Intra-EU and Extra-EU Trade.

TOP 5 FRESH FRUIT IMPORTS*

VOLUME GROWTH (% p.a. 2015-2024)



* Intra-EU and Extra-EU Trade.

IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	5,087	5,241	5,433	5,465
Oranges	735	986	980	911
Avocados	677	759	801	907
Pineapples	778	783	800	798
Table grapes	614	585	612	647
Easy peelers	407	506	471	557
Watermelons	407	506	471	557
Lemons	467	444	366	439
Apples	275	233	273	272
Other	2,313	2,132	2,285	2,338
TOTAL	11,761	12,176	12,493	12,892

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Tomatoes	795	803	835	780
Onions	211	447	331	396
Peppers	232	268	296	285
Cucumbers	106	101	107	120
Carrots	64	128	112	85
Courgettes	73	70	69	68
Mushrooms	30	27	26	26
Lettuce	14	25	17	15
Cauliflower	6	13	13	11
Other	537	542	579	591
TOTAL	2,067	2,423	2,385	2,377

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Apples	1,097	1,011	948	1,000
Oranges	384	314	299	300
Easy peelers	323	292	308	297
Avocados	95	104	117	129
Other	1,772	1,745	1,659	1,788
TOTAL	3,672	3,467	3,331	3,513

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Onions	1,343	994	1,258	1,307
Tomatoes	357	347	376	384
Peppers	300	284	300	300
Lettuce	239	228	196	220
Other	1,266	1,210	1,188	1,242
TOTAL	3,504	3,064	3,318	3,453

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

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EUROPEAN UNION

costs in 2025, while energy became slightly cheaper for consumers. From January to November, the EU's harmonised consumer price index averaged 2.4 per cent above the previous year's level. Once again, south-east Europe experienced an above-average increase, while countries like France, Italy, and Denmark saw below-average rises. However, no EU country experienced an actual decline in living costs. Overall, the harmonised consumer price index stood at nearly 134 points in November, three points more than in November 2024. Food, excluding beverages, contributed disproportionately to inflation. The EU food price index reached 149 points in November 2025, four points higher than the same time the previous year. For fresh fruit, the consumer price index reached 151 points in November, with values exceeding 160 points in some months of the year. However, due to the abundant apple harvest, the level eased again from September onwards. Thanks to generally good supply conditions, fresh vegetables contributed below average to inflation. In November 2025, the EU vegetable price index stood at 145 points, five points lower than in November of the previous year. However, as vegetable prices for consumers were significantly higher in March and April compared with the previous year, there was still a slight increase for the entire year.

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Netherlands	5,587	5,285	5,594	5,878
Germany	5,252	5,349	5,411	5,228
France	3,519	3,450	3,438	3,419
Spain	2,029	2,233	2,219	2,321
Belgium	2,065	2,032	2,103	1,959
Italy	1,890	1,979	1,925	1,948
Poland	1,573	1,651	1,753	1,602
Portugal	872	909	951	1,020
Romania	853	873	898	844
Austria	675	778	806	706
Sweden	658	615	611	607
Other	4,089	4,146	4,283	4,059
TOTAL	29,061	29,300	29,993	29,590

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Spain	6,730	6,325	6,599	6,764
Netherlands	4,268	4,320	4,325	4,381
Italy	2,534	2,392	2,510	2,541
Belgium	1,803	1,721	1,825	1,668
Greece	1,284	1,381	1,385	1,379
France	1,026	1,004	956	995
Poland	1,045	1,106	1,056	935
Germany	601	624	596	571
Portugal	624	519	509	523
Slovenia	177	158	158	152
Austria	155	182	182	127
Other	779	794	758	283
TOTAL	21,026	20,525	20,859	20,318

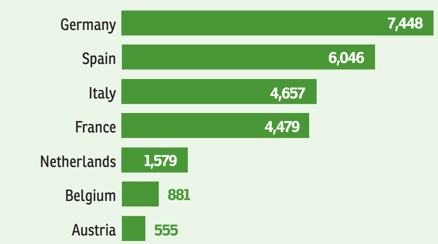
TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	35,569	38,962	42,122	42,568
Export	27,271	29,273	31,427	31,454
TRADE BALANCE	-8,297	-9,689	-10,695	-11,114

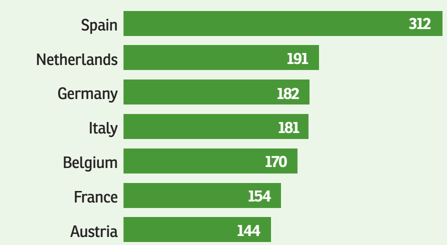
HOUSEHOLD DEMAND 2024 [1]

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



HOUSEHOLD DEMAND 2024[1]

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



IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Germany	3,223	3,350	3,495	3,344
France	1,923	1,884	1,999	1,842
Netherlands	1,426	1,514	1,574	1,499
Belgium	1,066	1,074	1,126	1,053
Spain	721	805	836	968
Poland	902	906	998	928
Italy	681	697	762	730
Czechia	458	428	461	470
Romania	387	420	463	437
Austria	324	389	399	378
Sweden	358	343	346	315
Other	2,057	2,198	2,300	1,987
TOTAL	13,532	14,009	14,761	13,951

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Netherlands	4,981	4,738	5,120	5,301
Spain	4,986	4,853	5,289	5,058
France	1,115	1,124	1,171	978
Italy	831	888	922	911
Belgium	804	776	799	885
Poland	878	792	794	745
Germany	413	476	512	423
Portugal	328	422	440	386
Austria	200	234	218	202
Greece	150	180	181	188
Hungary	88	111	110	114
Other	549	560	589	232
TOTAL	15,323	15,154	16,145	15,421

TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Import	18,563	21,408	21,672	20,593
Export	19,857	22,442	22,426	21,369
TRADE BALANCE	+1,294	+1,033	+754	+777

1) Excluding potatoes.

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

Population
9.2 m

Area
82,500 km²

GDP per Inhabitant
53,830 EUR

GDP Growth
1.0 per cent

Unemployment
3.6 per cent

CPI for Food
(2015=100)
134.2

AUSTRIA

After two weak, frost-affected years, Austria can look back on an above-average fruit harvest in its commercial orchards in 2025, when it achieved a similar harvest volume to that of 2022. According to Statistics Austria, just under 238,600 tonnes of fruit – excluding chokeberries and elderberries – were harvested. This not only exceeded the previous year's poor result by just over two-thirds, it also represents an increase of one-fifth compared to the ten-year average. At around 203,300 tonnes, 77 per cent more apples, pears and quinces were harvested than in the previous year. Against the long-term average, this represents a volume increase of 21 per cent. The stonefruit harvest was exceptionally high at 14,900 tonnes. And berry production was above average at 19,700 tonnes. The decline in commercial fruit-growing area, which has lasted for several years, continued in 2025; a reduction of 2 per cent to 10,020 ha, left the country with its smallest area in years.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2022	2023	2024	2025p
Apples	191	156	104	193
Strawberries	17	15	14	14
Pears	12	7	10	10
Apricots	5	4	5	8
Currants	3	2	2	3
Plums	2	1	2	3
Sweet cherries	2	2	2	3
Blueberries	2	2	2	2
Peaches	2	1	2	2
Other	1	1	2	1
TOTAL	237	191	145	239

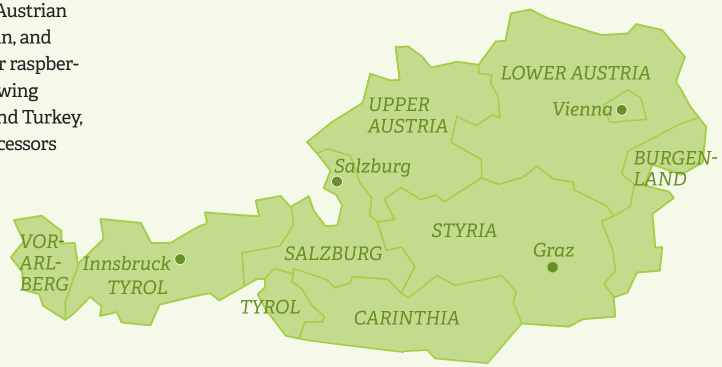
FRESH VEGETABLES [1 2]	2022	2023	2024	2025p
Onions	175	160	175	220
Carrots	118	121	121	125
Tomatoes	57	57	58	58
Cucumbers	44	43	43	40
Red/white cabbage	46	39	36	37
Iceberg lettuce	22	25	22	21
Sweetcorn	19	19	17	21
Spinach	9	8	14	15
Celeriac	15	13	13	14
Other	169	166	169	176
TOTAL	674	651	668	727

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

While there were no major shortages or crop failures to report on the fresh market in 2025, the situation on the processing market is tense, according to the Austrian Chamber of Commerce. Frost, heat, heavy rain, and drought have led to significant crop losses for raspberries, plums and other fruits in important growing countries in Eastern Europe such as Serbia and Turkey, driving up raw material prices. This puts processors under pressure, not only in Austria.

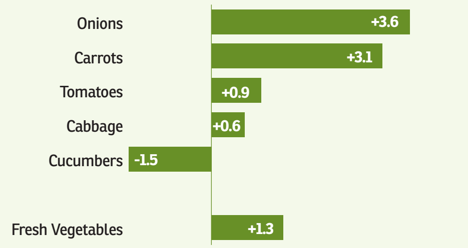
Unlike in previous years, favourable growing conditions, expanded growing areas, and higher yields for some crops in Austria have led to an increase in outdoor vegetable production. According to Statistics Austria, the open-field vegetable harvest amounted to around 726,800 tonnes (including Chinese cabbage) in 2025, exceeding the 700,000-tonne mark for the first time since 2011. This not only exceeded the 2024 result by 9 per cent, but also represents a 10 per cent increase compared to the five-year average. Although there were isolated cases of heat and drought damage as well as losses due to hail in outdoor vegetable crops this year, the season was generally characterised by good weather conditions. An above-average quantity of legumes, root vegetables and bulb vegetables was harvested, amounting to just under 419,900 tonnes. Onions, which account for 30 per cent of outdoor vegetable production, yielded a quarter more than usual, amounting to around 219,900 tonnes, with cultivation areas remaining stable. A total of 124,900 tonnes of carrots were harvested. Almost 170,900 tonnes (+1 per cent) of fruit vegetables were harvested, slightly more than in the previous year. The production volume of cabbage, leaf and stem vegetables is showing a downward trend. It most recently totalled just under 136,100 tonnes. This was not only 1 per cent less than in the previous year, but also 4 per cent down on the five-year average. At 19,600 ha, the area under cultivation for outdoor vegetables (including Chinese cabbage) in Austria reached its largest level to date.

According to forecasts by the Austrian National Bank, inflation in Austria will be 3.6 per cent in 2025, with an expected decline to 2.4 per cent in 2026, which could continue in 2027 and 2028. Against the backdrop of ongoing economic challenges, the economy is expected to stabilise gradually from 2025 to 2028. Economic growth of 0.6 per cent is expected for 2025.



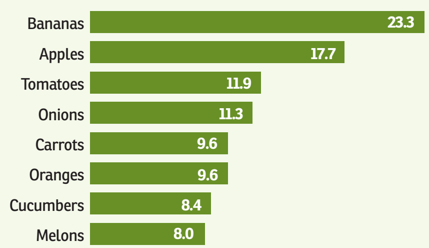
TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2016-2025)



TOP 8 FRUIT AND VEGETABLES 2024

HOUSEHOLD PURCHASES (kg)



Sources: AMI-informiert.de; RollAMA; AMA-Marketing; Statistik Austria; Eurostat

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [3]	2022	2023	2024	2025p
Bananas	154	149	148	149
Watermelons	43	58	70	84
Oranges	53	59	60	60
Table grapes	40	38	43	44
Apples	15	36	37	44
Table grapes	40	38	43	44
Easy peelers	37	38	42	42
Lemons	34	37	40	39
Pears	19	20	22	18
TOTAL	675	778	806	774

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Peppers	59	66	67	67
Tomatoes	63	86	70	61
Cucumbers/Gherkins	30	33	36	37
Lettuce	37	43	45	28
Onions	8	10	12	25
Courgettes	19	20	22	21
Mushrooms	11	14	14	15
Kohlrabi, Savoy	9	11	11	9
Other	88	106	122	143
TOTAL	324	389	399	407

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [3]	2022	2023	2024	2025p
Apples	42	50	36	28
Table grapes	9	6	10	10
Bananas	8	6	5	5
Sweet cherries	13	23	25	2
Other	83	97	106	99
TOTAL	155	182	182	144

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Onions	76	76	98	104
Peppers	32	37	35	34
Tomatoes	30	48	26	23
Cucumbers/Gherkins	17	13	10	16
Carrots	13	14	11	8
Other	31	46	38	39
TOTAL	200	234	218	224

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	967	1,180	1,335	1,300
Export	246	318	341	238
TRADE BALANCE	-721	-862	-994	-1,062

FRESH VEGETABLES	2022	2023	2024	2025p
Import	609	757	802	843
Export	210	295	255	260
TRADE BALANCE	-399	-462	-547	-583

Population
11.9 m

Area
30,500 km²

GDP per Inhabitant
52,370 EUR

GDP Growth
3.0 per cent

Unemployment
3.5 per cent

CPI for Food
(2015=100)
131.5

BELGIUM

Belgium is not only known for its chips, beer and chocolate, but also plays a key role in European fruit and vegetable cultivation. The latter applies in particular to the processing sector. After a poor pear harvest in 2024 due to weather conditions, the outlook for the 2025/26 season has changed. With an estimated harvest of 355,500 tonnes, Belgium takes the top spot ahead of the Netherlands and Italy. However, it will not be able to match the record result from 2023. The leading variety by far is Conference, accounting for 90 per cent of the harvest. Despite good weather conditions in late summer, which led to an improvement in fruit size and colour for mid- to late-season varieties, the harvest volume for both apples and pears across Europe remains below its full potential. Belgium once again faces an apple harvest below the 200,000-tonne mark in the 2025/26 season. The leading varieties grown are Jonagold and Jonagored.

Strawberries are another important pillar of Belgian fruit growing. Overall, Flemish strawberry producers look back positively on the 2025 season. Production was high and prices were reasonable. With around 120 producers and a cultivation area of 850 hectares, Coöperatie Hoogstraten is the country's most important marketing organisation for strawberries. The sunny spring weather was particularly beneficial for production. From weeks 1 to 46, around 49,000 tonnes of strawberries were delivered and marketed in Flanders last year – around 5,000 tonnes more than in the previous two years. As in other European countries, protected cultivation of sweet cherries is also becoming increasingly popular in Belgium. This recently accounted for 35 per cent of the total area. In 2025, BelOrta centralised its cherry processing in a new centre in Sint-Truiden, to make the logistics process more sustainable and efficient.

Belgium also has a strong position in the vegetable processing sector, particularly in frozen goods. However, farmers who wanted to switch to vegetable cultivation in 2025 as an alternative to growing cereals, sugar beet or potatoes were disappointed. Due to the economic situation, geopolitical tensions and US import tariffs, the processing industry concluded fewer contracts in spring 2025. In addition, high stocks in coldstores could be drawn on, as winter vegetables had suffered little damage because of the mild weather. As a result, fewer contracts were signed for some vegetable crops such as cauliflower, peas and beans. In addition, contract prices for beans, carrots and peas fell slightly. After initial fears that processors would not purchase all the contractually agreed quantities of industrial vegetables, the mood in the industry has improved again. Thanks to the improved sales situation, all agreed quantities can be purchased. At the end of the year, leeks, Brussels sprouts and carrots, among other things, were still in the fields. Contract negotiations with producers for the coming season took place in mid-December. According to the producer organization Ingro, a reduction in contract prices would be the wrong outcome, as the sector is facing various cost increases.

In mid-December, Stabel published an initial estimate of income trends for farmers in Belgium for the year 2025. According to this estimate, horticulture faces a decline. For vegetables, production value could fall by 16 per cent compared with 2024 against the backdrop of lower producer prices (-16 per cent) and largely stable production. The situation is different for fruit, where the production value in 2025 could rise by 10 per cent against the previous year. Favourable weather conditions have led to an increase in fruit production (+33 per cent), although prices have fallen (-17 per cent).

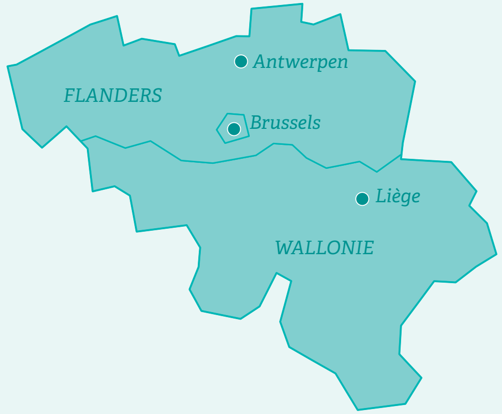
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Pears	346	381	269	355
Apples	239	203	160	183
Strawberries	49	51	52	55
Other	15	13	9	12
TOTAL	649	648	490	605

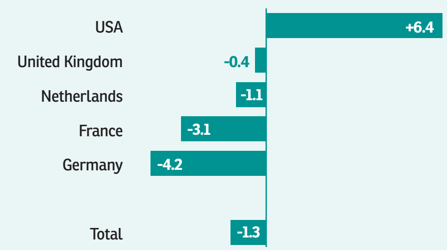
FRESH VEGETABLES [1]	2022	2023	2024	2025p
Tomatoes	299	290	284	282
Leeks	105	111	106	110
Carrots	66	60	89	90
Cucumbers	35	40	30	33
Peppers	35	31	33	32
Witloof chicory	28	29	30	29
Lettuce	31	30	27	26
Celeriac	15	16	15	15
Courgettes	13	13	13	13
Other [2]	1,034	1,035	1,231	1,100
TOTAL	1,661	1,655	1,858	1,730

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



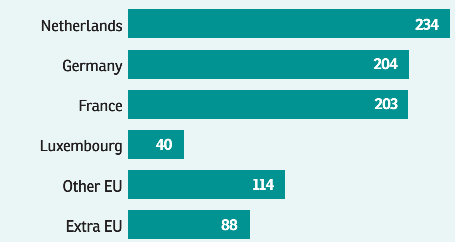
TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2015-2024)



FRESH VEGETABLE EXPORTS 2024

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VBT; WAPA

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [3]	2022	2023	2024	2025p
Exotics	1,491	1,459	1,554	1,547
Citrus	221	229	196	246
Apples	72	59	70	57
Pears	41	57	57	47
Other	251	239	244	211
TOTAL	2,076	2,043	2,121	2,108

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Carrots/Turnips	237	224	287	275
Onions/Shallots	115	112	121	117
Cucumbers	61	81	85	105
Tomatoes	74	77	60	94
Green beans	94	100	93	90
Peas	91	96	105	76
Peppers	55	54	49	53
Other	338	330	211	334
TOTAL	1,066	1,074	1,011	1,144

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [3]	2022	2023	2024	2025p
Exotics	1,212	1,132	1,286	1,306
Pears	314	325	328	291
Apples	141	127	101	84
Strawberries	38	36	36	41
Other	98	101	74	103
TOTAL	1,803	1,721	1,825	1,825

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Tomatoes	209	207	221	226
Carrots/Turnips	156	129	140	154
Leeks	63	63	62	70
Cucumbers	43	59	54	70
Celeriac	21	17	15	68
Onions/Shallots	55	56	57	65
Peppers	39	43	39	42
Witloof chicory	15	14	11	14
Other	203	188	200	253
TOTAL	804	776	799	962

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	2,224	2,219	2,636	2,821
Export	2,198	2,151	2,419	2,548
TRADE BALANCE	-26	-68	-217	-273

FRESH VEGETABLES	2022	2023	2024	2025p
Import	942	1,085	1,084	1,075
Export	873	951	955	981
TRADE BALANCE	-69	-134	-129	-94

Population 68.6 m | **Area** 633,900 km² | **GDP per Inhabitant** 42,590 EUR | **GDP Growth** 2.3 per cent | **Unemployment** 4.8 per cent | **CPI for Food** (2015=100) 123.3

FRANCE

In 2025, weather conditions in France were marked by considerable variability. Periods of heat, drought, thunderstorms and heavy rainfall characterised the spring and summer months in particular. These weather fluctuations affected cultivation, yields and quality across many fruit and vegetable crops, but did not generally lead to negative outcomes and in some cases resulted in satisfactory or above-average harvests.

With an estimated 3.2 mn tonnes, the French fruit harvest in 2025 is expected to be close to the previous year's level and thus remain above the volumes recorded in 2022 and 2023. Apple production will be an estimated 1.56 mn tonnes, corresponding to a decrease of 4 per cent compared with the previous year, but still 6 per cent above the five-year average. Pear production is 2 per cent down at 145,000 tonnes, but remains 13 per cent above the five-year average. Rainfall in spring 2025 impaired fruit set and led to fruit drop, particularly for summer pears. Strawberries were grown on a similar area as in 2024, but yields were slightly lower due to intense heat in June 2025. Peach and nectarine production is below the previous year's level, but reaches an average yield level, as rainfall during flowering adversely affected fruit formation. Melon production in 2025 is expected to be slightly above the previous year's level, with a stable cultivated area and generally positive conditions later in the season.

Total vegetable production in France in 2025 is forecast at 5.9 mn tonnes and is therefore expected to exceed the previous year's volume. Although the cultivated area for chicory roots declined, production of chicory heads could increase slightly. This is due to substantial root stocks in northern regions and good forcing yields, which reduced land requirements. The campaign for vegetables such as peas and beans was positive overall, despite climatic challenges. Heat, thunderstorms and heavy rainfall led to delayed sowing and regional differences, but yields were largely satisfactory. Disease and pest pressure was lower than in previous years, despite the occurrence of downy mildew at the end of the season in the south-west. Leek production in 2025/26 could decline despite a stable cultivated area, as drought in spring and summer particularly affected minimally irrigated crops in northern regions and hot conditions favored the spread of thrips. Lettuce areas and production volumes are expected to be slightly above 2024 levels. In addition, onion seeds could be sown on schedule in spring 2025. Favorable growing conditions during the vegetation period resulted in a large harvest, estimated to be 6 per cent higher than in 2024.

Foreign trade shows a mixed picture. While fruit imports in 2025 were approximately 3.6 per cent higher than in the previous year at around 3.6 mn tonnes, vegetable imports declined by about 4 per cent to around 2.5 mn tonnes. Exports show the opposite trend: fruit exports in 2025 were estimated to be around 8 per cent higher, while vegetable exports were 9 per cent lower than in 2024. France's main export destinations continued to be Spain, followed by Germany and Belgium, reflecting stable trade relationships within the European market.

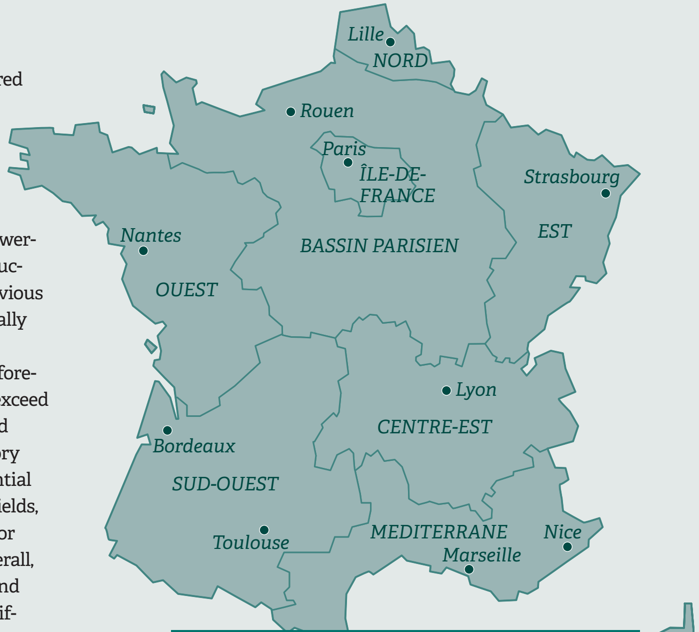
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2022	2023	2024	2025p
Apples	1,391	1,508	1,432	1,484
Melons	308	322	322	325
Bananas	226	212	211	212
Plums [2]	100	209	171	185
Pears	147	104	137	140
Peaches	119	112	118	120
Nectarines	110	112	115	116
Apricots	123	126	80	105
Strawberries	78	72	72	70
Kiwifruit	45	50	51	50
Other	410	406	529	436
TOTAL	3,057	3,233	3,238	3,243

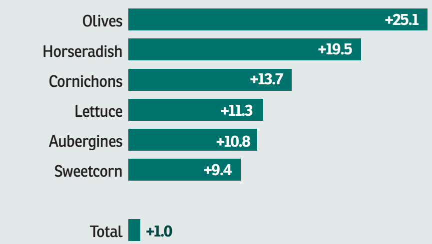
FRESH VEGETABLES	2022	2023	2024	2025p
Carrots	619	653	694	707
Tomatoes	695	656	696	682
Onions	511	615	526	560
Sweetcorn	413	459	399	413
Green beans	378	315	318	322
Peas	295	266	260	265
Cauliflower	226	193	216	202
Lettuce	174	162	165	168
Leeks	154	176	161	152
Witloof chicory	122	108	129	131
Other	2,146	2,064	2,257	2,310
TOTAL	5,733	5,667	5,821	5,912

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



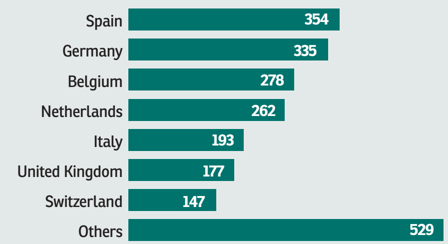
TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2015-2024)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2024)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	768	811	815	869
Easy peelers	352	332	339	341
Watermelons	259	271	201	251
Avocados	201	192	202	224
Navel Oranges	225	192	197	199
Pineapples	146	143	143	139
Melons	139	140	134	138
Others	1,427	1,372	1,408	1,408
TOTAL	3,519	3,450	3,438	3,561

FRESH VEGETABLES	2022	2023	2024	2025p
Tomatoes	569	530	616	563
Sweet peppers	165	166	184	176
Courgettes	136	146	149	150
Onions	110	126	130	135
Carrots	134	142	145	135
Cucumbers	72	73	75	79
Others	737	702	699	699
TOTAL	2,491	2,414	2,615	2,508

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Apples	333	304	322	327
Bananas	236	233	199	135
Watermelons	76	89	52	76
Avocados	41	38	47	49
Melons	34	35	33	31
Others	306	306	303	412
TOTAL	1,026	1,004	956	1,030

FRESH VEGETABLES	2022	2023	2024	2025p
Tomatoes	325	319	348	304
Beans	109	114	121	130
Onions	126	96	100	99
Cauliflower [3]	105	112	95	89
Carrots	55	57	105	65
Peas	59	63	41	62
Other	347	369	319	319
TOTAL	1,439	1,442	1,520	1,378

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	4,548	4,912	5,037	5,344
Export	1,337	1,416	1,513	1,611
TRADE BALANCE	-3,211	-3,496	-3,524	-3,733

FRESH VEGETABLES	2022	2023	2024	2025p
Import	3,619	4,122	4,114	4,132
Export	1,939	2,388	2,212	2,122
TRADE BALANCE	-1,680	-1,735	-1,901	-2,010

Population 83.6 m

Area 353,300 km²

GDP per Inhabitant 51,830 EUR

GDP Growth 2.2 per cent

Unemployment 2.4 per cent

CPI for Food (2015=100) 129.0

GERMANY

Fruit and vegetable production in Germany continues to face significant challenges. In 2025, the gap between rising production costs and the revenues achieved at producer level widened significantly during much of the season. For many types of fruits and vegetables, producer-level prices at best matched those of the previous year. At times, producer market prices even fell below the previous year's levels. This was often due to a slight oversupply in the market. There were almost no noticeable supply restrictions that could have led to price increases.

Production conditions were again challenging. While rainfall during the summer months ensured good water supply, excessive rainfall over short periods caused delays in maintenance and harvesting activities, and necessitated more plant protection activity. Nevertheless, harvest rates for many vegetable types were generally higher than in the previous year, resulting in slightly larger quantities harvested on largely unchanged cultivation areas.

The timing of production also posed challenges. Good weather conditions in early spring led to an early start to the German vegetable season, with rapidly increasing volumes. This put producer market prices under pressure, especially as stocks of stored vegetables were still high at the beginning of the year, and substantial imports arrived in Germany. The price pressure persisted throughout almost the entire season. Overall, the vegetable harvest in 2025 is expected to slightly exceed the previous year's level. However, the outcome depends on the extent of late increases in stored vegetable yields. In marketing terms, it remains uncertain whether all of the harvested quantities can be sold. Due to partly unfavourable weather conditions, significant sorting losses have been observed during the storage season so far.

Prices for German fruit were also under pressure. Unlike in 2024, frost damage during the flowering period was largely absent, which resulted in larger harvest volumes, particularly for stonefruit. However, the market benefited from significantly lower pressure from imported goods compared with other years. In Turkey and south-east Europe, fruit blossoms were heavily affected by frosts, leading to substantial reductions in harvest volumes in key origin countries. This was particularly noticeable for stonefruit.

A large German apple harvest present a challenge for the 2025/26 season. After two smaller years, at least a million tonnes of apples have been harvested this time around. Given that larger volume, producer prices for apples came under pressure at the start of the 2025/26 marketing season. Relief is expected later in the storage season when it becomes clear whether there is demand in key target markets.

While the price situation was difficult for producers in Germany, consumers benefited from low prices and competition in the retail sector. Up to and including November, consumers paid an average of 2 per cent more for fresh fruit and 1 per cent less for fresh vegetables than they did in the previous year. This led to increased purchases of both fruits and vegetables. However, consumer sentiment in Germany remained poor in 2025. Economic uncertainties led to restrained consumption, which was evident not only in retail food purchases but also in horeca revenues.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2022	2023	2024	2025p
Apples	1,071	941	872	1,000
Strawberries	133	131	120	118
Plums	47	44	44	46
Pears	36	38	39	44
Sweet cherries	38	32	28	38
Blueberries	15	15	15	15
Currants	14	13	10	12
Sour cherries	10	8	8	12
Mirabelle plums	5	6	6	6
Other	14	14	12	14
TOTAL	**1,384**	**1,241**	**1,153**	**1,304**

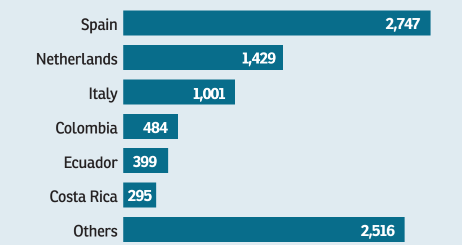
FRESH VEGETABLES [1 2 3]	2022	2023	2024	2025p
Carrots	780	797	851	820
Onions	578	666	744	750
White cabbage	385	399	427	460
Gherkins	169	194	214	200
Red cabbage	112	119	121	135
Iceberg lettuce	139	121	128	132
Beetroot	94	104	115	115
Tomatoes	102	101	108	108
Asparagus	110	112	108	99
Other	1,376	1,404	1,440	1,471
TOTAL	**3,846**	**4,016**	**4,256**	**4,290**

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

Sources: AMI-informiert.de; Destatis; Eurostat

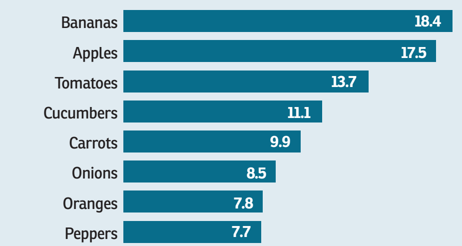
FRESH FRUIT AND VEGETABLE IMPORTS

BY ORIGIN ('000 tonnes, 2024)



TOP 8 FRUIT AND VEGETABLES 2024

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	1,277	1,377	1,357	1,423
Apples	447	435	495	491
Watermelons	414	458	482	490
Oranges	455	425	438	471
Easy peelers	379	346	365	366
Table grapes	358	354	326	344
Lemons	200	204	223	222
Avocados	130	159	163	173
Pears	178	166	153	160
Other	1,388	1,398	1,375	1,413
TOTAL	**5,226**	**5,321**	**5,378**	**5,552**

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes	658	699	751	744
Cucumbers/Gherkins	549	603	641	679
Peppers	398	396	418	444
Lettuce	302	297	300	299
Onions	214	254	238	233
Carrots	212	240	228	208
Courgettes	98	104	106	117
Broccoli, Cauliflower	102	86	108	109
Mushrooms	80	85	86	86
Other	609	586	615	651
TOTAL	**3,223**	**3,349**	**3,493**	**3,569**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	306	339	311	323
Apples	51	52	45	47
Table grapes	26	24	25	26
Oranges	20	15	20	18
Other	191	186	185	194
TOTAL	**594**	**615**	**586**	**609**

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Onions	71	79	92	92
Carrots	29	96	93	59
White cabbage	63	51	57	58
Lettuce	54	45	45	45
Other	196	204	224	210
TOTAL	**413**	**475**	**510**	**463**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	7,204	8,003	8,499	8,836
Export	734	816	862	899
TRADE BALANCE	**-6,470**	**-7,187**	**-7,636**	**-7,937**

FRESH VEGETABLES	2022	2023	2024	2025p
Import	5,475	6,310	6,282	6,472
Export	427	483	505	500
TRADE BALANCE	**-5,047**	**-5,828**	**-5,777**	**-5,971**

Population 10.4 m

Area 130,000 km²

GDP per Inhabitant 22,480 EUR

GDP Growth 3.5 per cent

Unemployment 6.2 per cent

CPI for Food (2015=100) 119.3

GREECE

Higher energy and packaging material costs, combined with the challenge of securing enough specialised personnel for harvesting, remain important issues in Greek agriculture. However, weather conditions again also had a significant impact on the country's fruit and vegetable production in 2025.

Severe frosts in March during the peak flowering season for stonefruit, with temperatures dropping to minus 8°C, caused considerable damage – particularly in the north of the country, where the production centres for stonefruit, almonds and kiwifruit are located. Even at the beginning of April, lighter frosts caused additional damage. As a result, last year's harvest of peaches, nectarines and flat varieties was expected to be around 20 per cent smaller. In the case of apricots, losses of up to 80 per cent were recorded for some of the earliest varieties. At just under 67,800 tonnes, the apricot harvest was not only 34 per cent smaller than in the previous year, but also 16 per cent below the five-year average.

Cherries were also affected by the spring frosts, making it a difficult year for cherry producers. Although total production was forecast to increase by 34 per cent compared with 2024, in the end losses of over 70 per cent were expected. Additional problems, such as fruit splitting, led to a further shortage in supply.

Plantations in Argolis, one of Greece's most important citrus-growing regions, were hit by a brief but extremely violent hailstorm in early November. As a result, the harvest is likely to have been decimated. Greece is the third-largest citrus producer in Europe after Italy and Spain.

Greek strawberry producers faced significant challenges last season, including unfavourable weather conditions, labour availability issues and high production costs. Nevertheless, they expanded their cultivation area for 2025/26 season by around 10 per cent, which will help them continue expanding into international markets.

Continued expansion of planted area meant that Greece once again took the lead among Europe's kiwifruit producers in 2025, pushing Italy into second place. Greece expected to harvest 367,000 tonnes of the fruit, around 7 per cent more than in 2024, even though the average fruit size was smaller.

At times, watermelons benefited from the shortage of stone fruit in Europe. However, exports were delayed in June by a seafarer strike at the ports of Petra and Igoumenitsa. This caused volumes to pile up. In addition, demand was weaker and prices fell in July as temperatures were too low in the purchasing countries.

The Hellenic Republic has a favourable trade balance for both fruit and vegetables. Fruit exports are more important than vegetable exports, with around 40 per cent of the fruit harvest leaving the country, compared with only around 14 per cent of the vegetable harvest.

PRODUCTION

VOLUME ('000 tonnes)

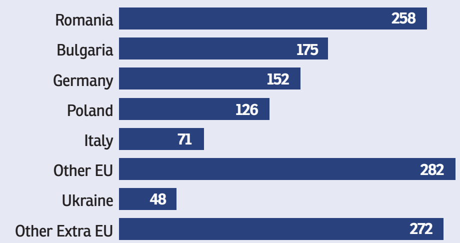
FRESH FRUIT	2022	2023	2024	2025p
Oranges	874	866	880	944
Peaches [1]	555	526	547	468
Watermelons	435	396	509	462
Kiwifruit	320	317	342	367
Easy peelers	201	171	224	224
Table grapes	290	152	211	190
Apples	321	183	245	178
Strawberries	100	108	136	156
Nectarines	144	140	154	140
Other	534	511	654	536
TOTAL	3,775	3,371	3,902	3,665

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes [1]	753	753	807	719
Onions	116	109	140	135
Cucumbers	120	115	137	124
Peppers	136	108	124	121
Cabbage	97	79	67	71
Lettuce	57	50	50	53
Spinach	69	51	53	50
Courgettes	54	48	45	47
Aubergines	45	41	48	46
Other	165	121	114	142
TOTAL	1,612	1,476	1,585	1,508

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

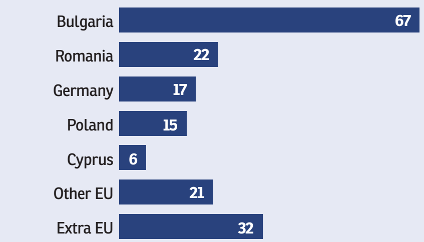
FRESH FRUIT EXPORTS 2024

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2024

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	205	223	235	273
Apples	13	18	21	30
Lemons	25	25	27	28
Pineapples	18	19	22	23
Other	41	41	47	49
TOTAL	302	325	352	403

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes [1]	16	26	30	17
Mushrooms	14	16	17	16
Onions	8	27	8	10
Other	38	39	43	42
TOTAL	76	108	97	85

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Oranges	266	357	326	298
Watermelons	192	167	173	238
Kiwifruit	186	212	190	216
Easy peelers	131	133	168	134
Bananas	59	73	87	110
Strawberries	75	83	80	92
Apples	73	54	54	48
Peaches	70	80	68	45
Nectarines	57	51	66	36
Table grapes	47	44	38	35
Apricots	21	26	26	27
Other	106	101	109	111
TOTAL	1,284	1,381	1,384	1,389

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Cucumbers	55	66	66	64
Tomatoes	32	37	38	40
Carrots	6	11	11	12
Other	56	67	67	76
TOTAL	150	180	181	192

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	251	276	303	359
Export	1,006	1,255	1,353	1,484
TRADE BALANCE	+755	+979	+1,050	+1,125

FRESH VEGETABLES	2022	2023	2024	2025p
Import	95	128	135	116
Export	143	193	194	217
TRADE BALANCE	+48	+65	+59	+101

Population
58.9 m

Area
297,800 km²

GDP per Inhabitant
37,310 EUR

GDP Growth
2.4 per cent

Unemployment
3.8 per cent

CPI for Food
(2015=100)
122.3

ITALY

Italy is one of Europe's largest fresh produce exporters, but life has not been easy for the country's fruit and veg industry. Climate change, the spread of invasive pests and diseases, the elimination of pesticides, rising production costs, declining domestic consumption, and increasing competitive pressure from southern Europe and North Africa, have made conditions difficult in recent years. Fortunately, 2025 brought a turnaround of sorts, at least in terms of foreign trade and Italian household consumption. According to projections based on foreign trade data for the first nine months available at the time of writing, the value of exports could reach a new peak this year, even though inflation has slowed across Europe. However, export volumes also increased in 2025 thanks to more favourable conditions. Growth rates were stronger for fruit than for vegetables. This was partly due to weaker supply from competitors such as Turkey, which suffered losses due to spring frosts, and Greece and Spain, due to hail. This enabled Italy to supply central Europe with stonefruit this summer.

Apples, Italy's most important export fruit, benefited in the first half of the year from weak supply in central Europe, with export prices correspondingly high. From autumn onwards, south-east Asia, India and Brazil proved to be very receptive to Italian apples. It is hoped that shipments via the Suez Canal will soon be feasible once more, so Italy can supply the Gulf with apples and kiwifruit. By contrast, Italy's vegetable trade has faced growing competition from North Africa and southern Europe, where production costs are lower. It has lost market share to Spain in carrots and kohlrabi, and to Egypt in spring onions. So in the future, Italy wants to tap into new markets in South America and Asia.

There are also encouraging developments on the domestic market. In recent years, Italy has seen a steady decline in fruit and vegetable consumption. This trend will not continue in 2025. Since the beginning of the year, Italian households have purchased more fruit and vegetables than a year ago. According to YouGov Italia, fruit and vegetable purchases in Italy rose by 4 per cent in the first nine months of 2025 year on year. Volume, meanwhile, was down by around 10 per cent on 2021. Due to higher purchase prices, the growth in expenditure is slightly stronger at +8 per cent compared with the previous year. It is not only tropical fruits that are popular with consumers; classic Italian fruits and vegetables such as apples, melons, pears, kiwifruit, tomatoes, courgettes, carrots and lettuce also performed well. A trend that will continue in 2025 is that supermarkets and discounters are gaining ground as places to buy fruit and vegetables, while street vendors, specialist shops and weekly markets are stagnating and small shops are even recording an increase again. Around 80 per cent of purchases are made in organised food retail outlets, compared with 70 per cent four years ago.

PRODUCTION

VOLUME ('000 tonnes)

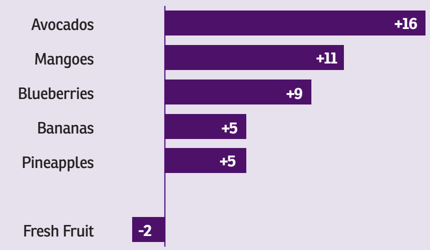
FRESH FRUIT	2022	2023	2024	2025p
Apples	2,113	2,175	2,329	2,250
Oranges	1,817	1,836	1,842	1,700
Melons	1,238	1,372	1,495	1,550
Table grapes	1,010	800	1,040	830
Easy peelers	820	831	834	770
Lemons	483	473	447	490
Nectarines	505	421	465	460
Peaches	438	396	402	410
Kiwifruit	365	264	291	340
Others	1,943	1,494	1,695	1,800
TOTAL	10,732	10,407	11,375	10,600

FRESH VEGETABLES [1,2]	2022	2023	2024	2025p
Tomatoes	6,136	6,017	6,022	6,625
Courgettes	583	578	583	545
Lettuce	481	554	520	540
Carrots	563	444	511	530
Fennel	334	506	487	490
Aubergines	315	324	413	455
Onions	403	388	398	395
Artichokes	386	377	374	355
Cauliflower/Broccoli	359	359	367	355
Sweet peppers	238	235	235	235
Others	2,759	2,267	2,852	2,475
TOTAL	12,557	12,048	12,762	13,000

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

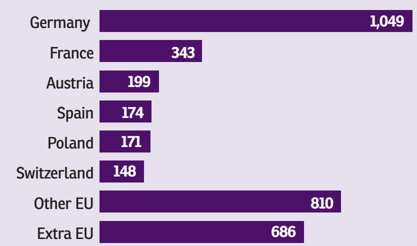
TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2015-2024)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2024)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	783	829	822	855
Oranges	195	189	150	175
Pineapples	144	146	144	135
Pears	106	116	108	95
Others	662	700	703	740
TOTAL	1,890	1,980	1,927	2,000

FRESH VEGETABLES [1,2]	2022	2023	2024	2025p
Tomatoes	145	130	150	150
Lettuce	129	130	132	145
Onions	55	89	93	125
Others	353	348	387	420
TOTAL	682	697	762	840

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Apples	855	834	902	1,105
Table grapes	445	378	376	360
Watermelons	261	251	291	305
Kiwifruit	269	288	212	260
Oranges	96	105	115	120
Peaches/Nectarines	140	86	116	105
Bananas	91	110	114	90
Easy peelers	59	60	83	75
Plums	48	33	42	40
Others	270	247	259	290
TOTAL	2,534	2,392	2,510	2,750

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Lettuce	201	204	203	210
Cauliflower/Broccoli	82	86	88	95
Carrots	74	93	109	80
Tomatoes	59	81	79	80
Kohlrabi/Kale	68	66	71	75
Beetroot	59	65	74	75
Fennel	48	51	48	50
Spinach	37	36	38	40
Courgettes	28	25	24	30
Others	175	181	188	220
TOTAL	831	888	922	955

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	1,930	2,235	2,278	2,520
Export	3,187	3,390	3,655	4,265
TRADE BALANCE	+1,257	+1,155	+1,377	+1,745

FRESH VEGETABLES	2022	2023	2024	2025p
Import	984	1,066	1,146	1,180
Export	1,582	1,873	1,842	1,915
TRADE BALANCE	+598	+807	+696	+735

Population
18.0 m

Area
34,000 km²

GDP per Inhabitant
62,380 EUR

GDP Growth
1.0 per cent

Unemployment
2.8 per cent

CPI for Food
(2015=100)
131.9

NETHERLANDS

Despite its diminutive stature as one of the EU's lesser-sized nations, the Netherlands boasts a pivotal role as a major hub for international trade, a feat made possible by its extensive coastline. Despite its comparatively modest production, the country ranks as the second-largest exporter of fresh fruit within the EU, with Spain ranking at the top. Furthermore, a significant volume of fruit imported into Europe enters via Dutch ports.

Favourable growing conditions in spring, with plenty of sunshine and no significant frost, led to a large domestic production of so-called fruit vegetables. Both at the start of the Dutch season and during the summer months, there was a large quantity available, so prices were comparatively low.

The area of greenhouse vegetables in the Netherlands will increase to 5,760 hectares by 2025, according to new, provisional figures from CBS. The sweet pepper area will grow by 130 hectares to reach 1,660 hectares. Red peppers account for the largest share at 960 hectares, followed by yellow and green. Tomato area is set to increase, reaching a total of 1,910 hectares.

In its preliminary harvest estimate for 2025, Dutch statistics agency CBS reported a higher gross total harvest of seed onions than in 2024, at around 1.7 mn tonnes (+17 per cent), which was once again at a record level. The considerable increase compared with the previous year was mainly due to very good growing conditions, resulting in high yields. The total yield of sown onions was not only much higher than last year but also the highest in more than ten years. Cultivated area expanded again by around 4 per cent to 33,183 hectares.

Cabbage and Brussels sprouts accounted for the largest increases in the area of open-field vegetables in 2025. The acreage of cabbage rose 2,900 hectares, marking the largest area recorded since at least 2010. This growth was driven mainly by red cabbage and white cabbage. A notable increase was also seen for Brussels sprouts, for which cultivated area expanded to 3,130 hectares. This development appears to reflect the impact of several consecutive years of strong yields.

Fruit production is considerably lower than vegetable production. The main fruits harvested are topfruit, such as apples and pears, as well as strawberries.

A peak harvest was expected for the Elstar apple variety in 2025. By contrast, the Jonagold group was affected by heavy fruit drop; but, as a result, a good spread of sizes was expected. Club varieties are tending to increase in all growing regions. Meanwhile, the area under cultivation for Jonagold types is declining. In recent years, apple orchards have been cleared in favour of pear cultivation. Although this change has slowed down, it does continue.

The acreage of field-grown strawberries declined further, to 724 hectares. The area dedicated to strawberries grown under glass and in tunnels also fell, decreasing by 1.8 per cent year on year to 591 hectares. Soft fruit was cultivated on approximately 1,400 hectares of open land. This category includes blueberries, redcurrants, blackberries, raspberries, blackcurrants, and other small fruits.

PRODUCTION

VOLUME ('000 tonnes)

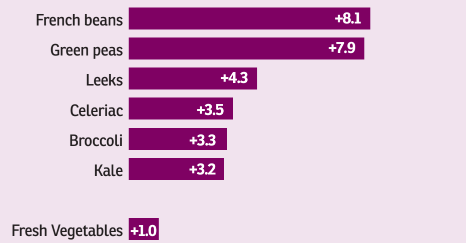
FRESH FRUIT	2022	2023	2024	2025p
Pears	352	358	322	358
Apples	235	199	194	236
Strawberries	87	79	86	82
Other berries	22	22	11	18
Other	40	38	23	34
TOTAL	**736**	**696**	**636**	**728**

FRESH VEGETABLES [3]	2022	2023	2024	2025p
Onions	1,483	1,577	1,761	2,089
Tomatoes	770	726	829	861
Carrots	489	486	539	475
Peppers	435	420	407	442
Cucumbers	440	426	416	424
Mushrooms	235	205	200	180
White cabbage	106	125	125	145
Leeks	95	126	129	123
Celeriac	80	94	78	104
Iceberg lettuce	88	90	93	98
Brussel sprouts	62	53	65	75
Aubergines	66	60	59	62
Cauliflower	49	53	58	57
French beans	52	70	62	55
Other	509	555	580	500
TOTAL	**4,959**	**5,066**	**5,400**	**5,690**

1) Excluding nuts. 2) Including re-exports. 3) Excluding potatoes.

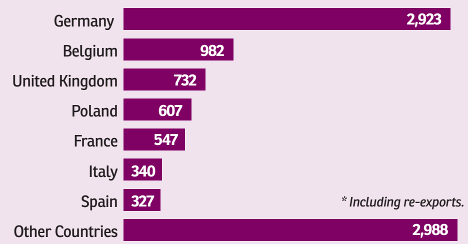
TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2015-2024)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION* ('000 tonnes, 2024)



** Including re-exports.*

Sources: AMI-informiert.de; CBS; Eurostat

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2022	2023	2024	2025p
Bananas	1,466	1,360	1,492	1,433
Oranges	569	595	586	602
Avocados	462	499	520	572
Table grapes	502	458	495	529
Easy peelers	244	260	267	328
Mangoes	278	279	237	294
Other	2,050	1,813	1,972	2,128
TOTAL	**5,569**	**5,264**	**5,568**	**5,887**

FRESH VEGETABLES [2,3]	2022	2023	2024	2025p
Onions	181	256	292	307
Tomatoes	256	209	226	218
Cucumbers	105	131	118	129
Lettuce	108	91	87	87
Other	775	827	851	854
TOTAL	**1,426**	**1,514**	**1,574**	**1,596**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [1,2]	2022	2023	2024	2025p
Bananas	1,024	1,038	938	914
Avocados	409	439	457	507
Table grapes	341	337	402	435
Pears	406	381	403	425
Oranges	327	372	341	352
Other	1,747	1,737	1,763	2,053
TOTAL	**4,254**	**4,303**	**4,304**	**4,687**

FRESH VEGETABLES [2,3]	2022	2023	2024	2025p
Onions	1,614	1,429	1,755	1,834
Tomatoes	908	864	928	1,029
Cucumbers	429	450	469	517
Peppers	395	394	391	463
Carrots	451	453	431	447
Cabbage	268	221	229	259
Lettuce	159	148	160	156
Celeriac	99	95	100	90
Other	659	684	657	701
TOTAL	**4,981**	**4,738**	**5,120**	**5,496**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT [1]	2022	2023	2024	2025p
Import	7,627	7,833	8,643	9,326
Export [2]	7,126	7,868	8,602	9,462
TRADE BALANCE	**-501**	**+35**	**-40**	**+136**

FRESH VEGETABLES	2022	2023	2024	2025p
Import	2,017	2,149	2,149	2,193
Export [2]	6,143	6,763	6,724	7,151
TRADE BALANCE	**+4,126**	**+4,614**	**+4,575**	**+4,958**

Population 22.2 m | **Area** 752,400 km² | **GDP per Inhabitant** 55,767 EUR | **GDP Growth** 0.8 per cent | **Unemployment** 5.6 per cent | **CPI for Food** (2015=100) 122.6

DENMARK, FINLAND, SWEDEN

Extreme weather events were largely absent in the Nordic countries in 2025. However, summer droughts continue to pose a recurring challenge for horticultural production. Since conditions were like the previous year, there were hardly any changes in fruit and vegetable production compared with 2024. The total fruit harvest in Denmark, Finland, and Sweden is estimated at 113,000 tonnes, approximately 1 per cent more than the previous year. A slight increase in Denmark and Sweden contrasts with a somewhat smaller harvest in Finland. These changes are primarily attributed to the apple harvest. For vegetables, there was no change in total production compared with 2024, with the harvest volume remaining at 984,000 tonnes. A slight decline in Denmark and Finland was offset by a larger harvest in Sweden, mainly driven by increased onion production. For the most important crops by volume, Denmark and Finland also saw slightly higher yields.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Denmark	**43**	**33**	**39**	**42**
– Apples	24	15	21	24
– Pears	7	7	7	7
– Strawberries [2]	6	5	5	5
Finland	**27**	**25**	**25**	**22**
– Strawberries [2]	16	14	12	12
– Apples	7	8	9	6
Sweden	**50**	**51**	**48**	**49**
– Apples	32	32	32	32
– Strawberries [2]	16	16	14	15
TOTAL	**121**	**109**	**112**	**113**

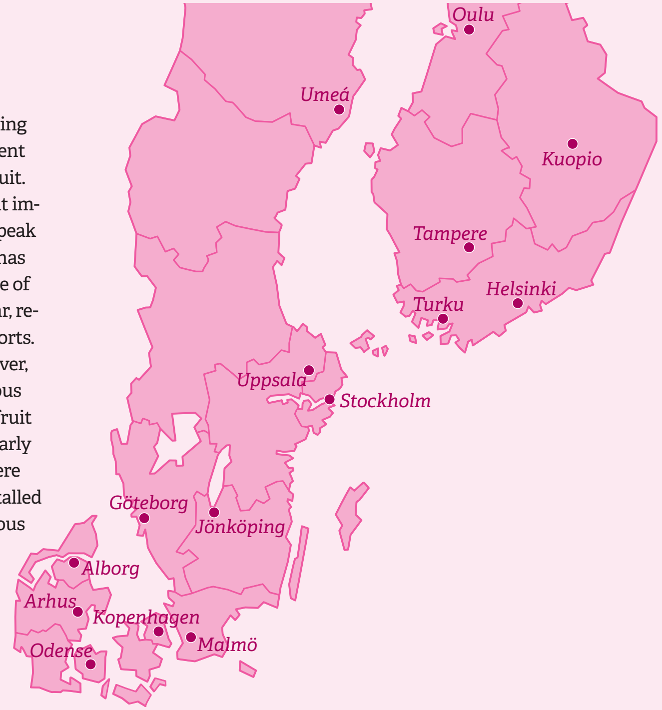
FRESH VEGETABLES [1]	2022	2023	2024	2025p
Denmark	**255**	**248**	**273**	**270**
– Carrots	75	76	80	82
– Onions	65	64	60	64
– White cabbage	11	15	14	14
Finland	**286**	**266**	**297**	**294**
– Carrots	76	64	76	75
– Tomatoes	50	50	54	54
Sweden	**385**	**369**	**414**	**420**
– Carrots	114	108	123	120
– Onions	61	68	75	94
TOTAL	**926**	**883**	**984**	**984**

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

Due to climatic conditions and the limited growing season, the Nordic countries remain highly dependent on imports to supply the market, particularly for fruit. After a slight decline in the previous year, fresh fruit imports increased again in 2025 but did not reach the peak of 2022. The import trend over the past eight years has been slightly negative. On average, imported volume of fruit and vegetables decreased by 2 per cent per year, reflecting efforts to reduce dependency on those imports. Preliminary data for fresh vegetable imports, however, indicate a slight decrease compared with the previous 12 months. In total, around 1.26 mn tonnes of fresh fruit were imported into the Nordic countries in 2025, nearly 5 per cent more than the previous year. Bananas were imported in larger quantities. Vegetable imports totalled 656,000 tonnes, about 3 per cent less than the previous year. Key fruit vegetable types were imported in similar volumes to the previous year, except for cucumbers. Imports of cucumbers, especially to Sweden, fell short of last year's level.

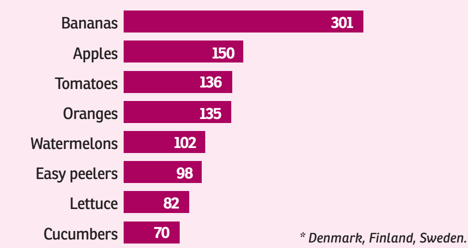
Together, the Nordic countries achieve a calculated self-sufficiency rate of just under 9 per cent for fresh fruit, which has seen only minor changes in recent years. For vegetables, the calculated self-sufficiency rate has steadily increased over the past four years, reaching nearly 64 per cent most recently. However, this applies only to certain product categories, with carrots and onions contributing significantly to the high self-sufficiency rate. Imports, on the other hand, are dominated by fruit vegetables. The trade balance for both fruit and vegetables remains negative in the Nordic countries. Preliminary data indicate that the trade deficit grew even larger in 2025.

The economic situation in the Nordic countries developed differently in 2025. In Denmark, private consumption benefited from higher real incomes and low interest rates. In contrast, economic recovery in Sweden and Finland was slow. Sweden has one of the highest unemployment rates in the EU, and economic sentiment remains subdued. A reduction in VAT is intended to stimulate consumption. Finland faces structural challenges such as an aging population and high energy prices. Additionally, geopolitical uncertainties due to its border with Russia add to the difficulties.



FRUIT AND VEGETABLE IMPORTS 2024

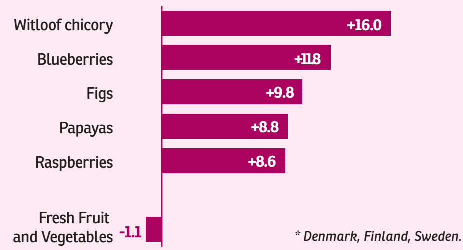
BY NORDIC COUNTRIES* ('000 tonnes)



** Denmark, Finland, Sweden.*

TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH* (% p.a. 2015-2024)



** Denmark, Finland, Sweden.*

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Denmark	**372**	**377**	**366**	**366**
– Bananas	81	92	82	88
– Apples	41	43	43	40
– Oranges	47	43	42	38
Finland	**276**	**259**	**231**	**267**
– Bananas	101	90	44	70
– Apples	29	31	31	32
Sweden	**654**	**610**	**604**	**625**
– Bananas	196	181	175	187
– Apples	86	83	76	77
TOTAL	**1,302**	**1,246**	**1,201**	**1,258**

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Denmark	**199**	**192**	**204**	**211**
– Tomatoes	38	34	36	37
– Cucumbers	24	24	25	25
– Lettuce	23	23	23	23
Finland	**126**	**106**	**124**	**108**
– Lettuce	24	24	23	25
– Tomatoes	24	23	25	24
Sweden	**358**	**343**	**346**	**336**
– Tomatoes	85	76	75	76
– Cucumbers	37	37	40	35
TOTAL	**683**	**641**	**674**	**656**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Denmark	**30**	**33**	**28**	**26**
– Bananas	4	11	5	4
– Apples	6	3	3	3
Finland	**7**	**6**	**4**	**6**
Sweden	**53**	**40**	**38**	**42**
TOTAL	**90**	**79**	**70**	**73**

FRESH VEGETABLES [1]	2022	2023	2024	2025p
Denmark	**63**	**57**	**58**	**55**
– Carrots	34	28	26	27
– Onions	7	9	11	6
Finland	**6**	**5**	**6**	**7**
Sweden	**21**	**24**	**22**	**29**
TOTAL	**90**	**87**	**86**	**91**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	1,666	1,674	1,743	1,863
Export	117	111	95	101
TRADE BALANCE	**-1,549**	**-1,563**	**-1,648**	**-1,762**

FRESH VEGETABLES	2022	2023	2024	2025p
Import	1,234	1,311	1,310	1,345
Export	166	165	179	183
TRADE BALANCE	**-1,067**	**-1,146**	**-1,132**	**-1,163**

Population 36.5 m

Area 307,200 km²

GDP per Inhabitant 22,610 EUR

GDP Growth 1.4 per cent

Unemployment 1.8 per cent

CPI for Food (2015=100) 148.7

POLAND

Although weather conditions were challenging in the first half of this year, overall the fruit and vegetable harvest in Poland in 2025 was expected to be larger than in 2024. Flowering and pollination of the trees took place at the average time. However, a subsequent dry period weakened them. Plant protection efficiency was also reduced due to the drought and low temperatures. Weather conditions improved in the second half of the year. From June onwards, temperatures increased and sufficient rainfall had a positive effect on fruit size and thus yield. At an estimated 4.6 mn tonnes, the Polish fruit harvest in 2025 will be 9 per cent higher than in the previous year, but still below the levels seen in 2022 and 2023. Thanks to favourable weather conditions at the end of the growing season, this year's apple harvest in Poland increased by 9 per cent year on year to around 3.7 mn tonnes. Sweet cherries (58,000 tonnes) and sour cherries (144,000 tonnes) also recorded production increases of 14 per cent and 31 per cent respectively, as did plums (113,000 tonnes) with 19 per cent and currants (112,000 tonnes) with 12 per cent. However, adverse weather conditions in the first half of the year reduced the strawberry harvest by 5 per cent to an average of 151,000 tonnes.

Vegetables were sown between the end of March and the beginning of April. However, the lack of rainfall at this time hampered germination and plant development. In the middle of the year the situation finally improved with rising temperatures and rainfall, just as in fruit production. Yields in vegetable crops increased. Good weather conditions in August and September meant the country's vegetable harvest increased to an estimated 5.5 mn tonnes. This represents an increase of 6 per cent over the previous year. Tomato production in particular rose by 12 per cent year on year to around 1.1 mn tonnes, but cabbage (606,000 tonnes) and cauliflower (120,000 tonnes) also saw increases of 6 per cent and 11 per cent respectively over the previous year. Onion production, on the other hand, decreased by 7 per cent to around 630,000 tonnes due to a difficult start in the spring. Due to fungal and pest pressure in the second half of the year, the cucumber harvest fell by 7 per cent to around 358,000 tonnes.

A bigger vegetable harvest in Poland means estimated export volume of around 847,000 tonnes of vegetables is not surprising. In comparison with the year before, 6 per cent more vegetables were exported in 2025. Carrot exports recovered, rising by 71 per cent to around 41,000 tonnes compared with a sobering 2024. Onion exports, on the other hand, decreased by 4 per cent to around 143,000 tonnes. Polish fruit exports fell by 2 per cent year on year to around 1.1 mn tonnes. Pear exports in particular were down 14 per cent on the previous year at 80,000 tonnes, while strawberry exports also decreased by 6 per cent to 15,000 tonnes.

Polish fruit imports increased by 27 per cent year on year to 2.2 mn tonnes in 2025. This was mainly due to an enormous increase (+83 per cent) in the category known simply as 'Other Fruits', in which imports of cider apples for processing have risen sharply.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2022	2023	2024	2025p
Apples	4,265	3,893	3,384	3,700
Strawberries	185	180	159	151
Sour cherries	184	169	110	144
Plums	133	127	95	113
Currants	146	130	100	112
Raspberries	105	96	77	78
Pears	81	79	74	78
Blueberries	64	62	62	63
Sweet cherries	77	69	51	58
Other	124	120	102	103
TOTAL	5,363	4,924	4,214	4,600

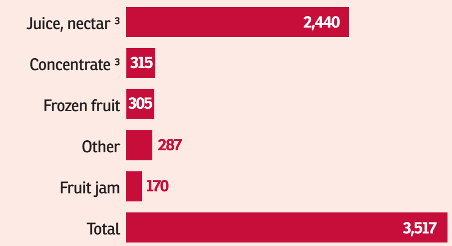
FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes	787	817	980	1,098
Onions	650	634	675	630
Cabbage	644	628	571	606
Carrots	620	577	559	599
Mushrooms	350	355	376	373
Cucumbers	472	448	385	358
Beetroot	242	253	241	257
Cauliflower	132	127	108	120
Other	1,546	1,326	1,268	1,432
TOTAL	5,443	5,165	5,163	5,473

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

Sources: AMI-informiert.de; Eurostat; GUS; IERiGZ; Wapa

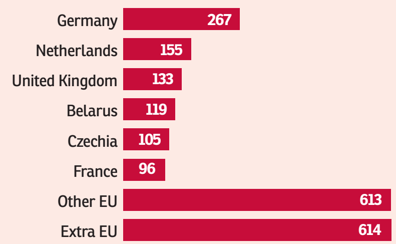
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2024/25)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2024)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	449	494	511	526
Watermelons	166	176	205	200
Easy peelers	157	164	178	179
Lemons	137	138	145	138
Oranges	155	142	140	138
Other	506	531	568	1,040
TOTAL	1,569	1,646	1,748	2,221

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes	181	216	243	174
Onions	220	183	188	156
Cucumbers	79	84	107	112
Peppers	69	69	76	87
Other	353	354	384	413
TOTAL	902	906	998	942

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Apples	693	782	755	745
Pears	108	109	93	80
Bananas	57	39	42	41
Cider apples	40	27	29	27
Blueberries	23	22	26	25
Easy peelers	17	17	18	18
Strawberries	14	20	16	15
Other [4]	92	89	119	129
TOTAL	1,045	1,106	1,098	1,080

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Mushrooms	256	250	255	252
Onions	191	144	148	143
Tomatoes	82	76	78	91
Cabbage	65	60	58	69
Carrots	50	39	24	41
Peppers	26	28	26	27
Cauliflower, Broccoli	21	20	24	27
Other	186	175	180	198
TOTAL	878	792	794	847

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	1,683	1,950	2,152	3,659
Export	691	818	932	1,006
TRADE BALANCE	-992	-1,132	-1,220	-2,653

FRESH VEGETABLES	2022	2023	2024	2025p
Import	981	1,269	1,253	1,060
Export	952	1,069	1,110	1,092
TRADE BALANCE	-29	-200	-143	+32

Population 10.7 m

Area 91,000 km²

GDP per Inhabitant 27,060 EUR

GDP Growth 1.9 per cent

Unemployment 4.4 per cent

CPI for Food (2015=100) 122.2

PORTUGAL

In Portugal, the year was marked by significant climatic variability that shaped the agricultural season. It began with an unusually warm and rainy January, ranking as the sixth warmest since 1931 and recording the second-highest precipitation levels since 2000. Rainfall continued through February and March, followed by a warm and wet April. Later, June brought intense heat and dry conditions. While these fluctuations posed challenges for flowering and pollination, they also highlighted the sector's capacity to adapt under changing conditions. Fruit production showed a mixed but resilient performance. Cherry orchards faced a third consecutive year of rainfall during flowering, limiting overall yields; however, late varieties benefited from more favourable conditions. Apple orchards presented varied outcomes: although Golden and Fuji varieties declined, Reineta and Candine registered slight gains. Overall apple production decreased by around 5 per cent, influenced by bacterial fire blight, hail, and regional differences.

Portugal's Rocha pear harvest remained stable compared to 2024 but continued to fall well below its potential for the fourth consecutive year. Peach orchards experienced a 15 per cent reduction, largely linked to rainfall during critical pollination and fruit-setting periods. According to WAPA, a total volume of 121,000 tonnes is expected in 2025. Wine grape production declined by 20 per cent, with the Alentejo and Douro regions most affected by extreme weather events.

Citrus production in the Algarve region, responsible for 88 per cent of Portugal's total citrus output, began later than usual as a result of spring temperature fluctuations and limited rainfall, leading to smaller fruit sizes. Nevertheless, overall fruit quality remained good. Portugal is forecasting a year-on-year increase in citrus production.

Kiwifruit production is expected to rebound by 10 per cent compared to 2024, signalling a partial recovery, even though yields remain below the five-year average.

In 2024, Portugal was the third-largest producer of tomatoes in the European Union, just behind Italy and Spain. In 2025, tomato cultivation area decreased by 16 per cent due to international competition, rising production costs, and delayed planting caused by persistent rainfall. Even so, the campaign developed relatively well overall, with only localised impacts from extreme heat, and production was only slightly below the previous year. Carrots, cabbages, and pumpkins also recorded stable harvests, resulting in a solid performance for Portugal's vegetable sector in 2025.

In international trade, vegetable imports and exports remained stable, based on official data up to September and estimates for the following months. In the fruit sector, there was a slight increase in banana and orange imports, along with a more notable rise in watermelon imports. This trend occurred despite a good domestic harvest and reflects a continued increase in domestic consumption of this fruit. Overall, despite reduced productivity in several sectors, Portuguese agriculture has shown resilience, underscoring the need for stronger adaptive strategies to address extreme weather and support long-term sustainability.

PRODUCTION

VOLUME ('000 tonnes)

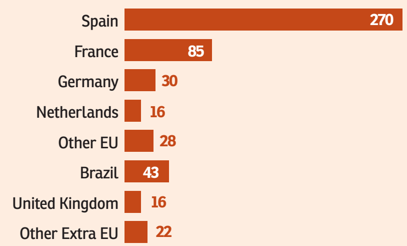
FRESH FRUIT	2022	2023	2024	2025p
Apples	291	295	313	302
Oranges	378	279	354	310
Pears	132	112	125	121
Melons	60	53	73	65
Easy peelers	43	37	47	45
Kiwifruit	53	49	31	38
Raspberries	30	36	33	34
Peaches	32	35	36	32
Watermelons	30	28	31	29
Blueberries	19	21	23	22
Other	255	355	305	300
TOTAL	1,323	1,300	1,342	1,297

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes [1]	1,541	1,812	1,762	1,437
Carrots	100	126	129	131
Cabbage	128	104	127	121
Pumpkins	81	96	106	105
Onions	60	57	61	58
Lettuce	56	70	57	54
Savoy cabbage	50	50	51	50
Peppers	41	47	46	50
Broccoli/Cauliflower	53	56	53	53
Other	305	377	356	391
TOTAL	2,417	2,794	2,748	2,450

1) Including products grown for processing. 2) Excluding potatoes.
Sources: AMI-informiert.de; Eurostat, INE, World Citrus Organisation

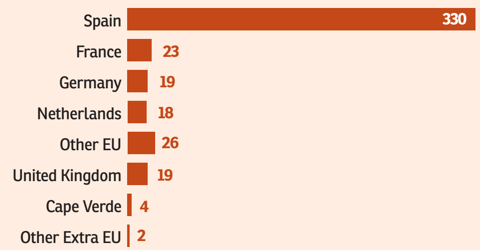
FRESH FRUIT EXPORTS 2024

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2024 [2]

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	218	220	214	218
Oranges	112	135	131	144
Pineapples	70	69	71	66
Watermelons	47	45	52	64
Melons	46	44	48	62
Apples	44	66	53	52
Other	334	324	374	396
TOTAL	872	903	944	1,001

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Onions	86	85	93	94
Tomatoes	52	57	59	54
Carrots	30	41	41	41
Peppers	24	27	27	26
Cauliflower	29	20	24	24
Pumpkins	6	8	8	8
Other	84	115	124	125
TOTAL	312	353	376	371

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Oranges	140	141	140	123
Pears	119	69	66	75
Apples	82	64	70	72
Raspberries	27	28	28	31
Lemons	61	33	24	29
Kiwifruit	30	30	28	25
Other	163	153	151	176
TOTAL	622	517	507	531

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes	156	242	253	170
Other cabbage	13	25	29	27
Pumpkins	32	26	27	26
Carrots	17	30	32	23
Courgettes	8	7	7	7
Leeks	4	6	6	7
Onions	8	9	5	4
Other vegetables	89	77	82	131
TOTAL	328	422	440	394

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	835	973	1,032	1,158
Export	799	837	879	983
TRADE BALANCE	-36	-136	-153	-175

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Import	256	361	348	375
Export	213	298	318	308
TRADE BALANCE	-43	-62	-30	-67

Population 49.1 m

Area 502,700 km²

GDP per Inhabitant 32,630 EUR

GDP Growth 0.7 per cent

Unemployment 7.4 per cent

CPI for Food (2015=100) 123.3

SPAIN

The year 2025 has been a positive and expansionary one for the Spanish agricultural sector. Spain has consolidated its position as the fourth-largest agri-food economy in the European Union, accounting for 12.3 per cent of the sector's Gross Value Added (GVA) at EU level, according to the 2025 Observatorio Agroalimentario prepared by Cajamar.

Total fruit production in 2025 is estimated at 13.308 mn tonnes, broadly in line with the previous year. Vegetable production, meanwhile, is projected at 12.493 mn tonnes, representing a year-on-year decline of nearly 5 per cent. This decrease is mainly due to lower output of tomatoes, carrots, and onions, although overall production levels for these crops remain satisfactory.

Favourable weather conditions have been a key factor supporting agricultural activity throughout the year.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Oranges	2,817	2,715	2,905	2,735
Easy peelers	1,800	1,862	1,816	1,739
Watermelons	1,165	1,169	1,223	1,247
Peaches [1]	558	843	833	870
Lemons	860	1,145	915	827
Apples [1]	412	518	546	643
Melons	524	517	594	612
Nectarines	312	521	526	522
Table grapes	292	348	364	386
Strawberries	326	329	324	321
Other	3,005	3,289	3,366	3,406
TOTAL	12,073	13,255	13,410	13,308

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes [1]	3,652	3,968	4,574	4,234
Peppers [1]	1,533	1,390	1,519	1,509
Onions	1,223	1,191	1,376	1,176
Lettuce	967	863	914	945
Cucumbers	770	722	758	804
Broccoli, Cauliflower	677	637	671	645
Courgettes	618	566	601	639
Carrots	388	388	394	295
Garlic	282	194	246	238
Other	2,227	2,055	2,093	2,010
TOTAL	12,336	11,975	13,145	12,493

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

According to data from MITECO (the Ministry for the Ecological Transition), the prolonged drought that affected Spain in 2022 and 2023 has largely been overcome. In the first half of 2025, only 0.5 per cent of the national territory was affected by prolonged drought, compared to 25 per cent in 2023, significantly improving growing conditions nationwide.

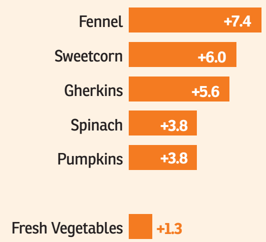
Spain has once again consolidated its position not only as one of the leading suppliers of fresh fruit and vegetables within the European Union, but also worldwide. The Iberian country is the world's second-largest exporter of cucumbers and peppers by volume, behind Mexico, based on data from September 2024 to August 2025. At the European level, Spain leads exports of aubergines and lettuce.

In the fruit sector, exports of oranges, watermelons, and melons stand out, with melons recording a 9 per cent increase in export volume compared to 2024, Germany being their main destination. Spain has also positioned itself as a niche producer of exotic fruits in Europe. According to MAPA (Ministry of Agriculture), the national area devoted to avocado and mango cultivation has experienced notable growth over the past ten years, increasing by 62 per cent and 75 per cent respectively to reach 24,213 hectares of avocados and 6,043 hectares of mangoes. Consumption of both fruits is growing rapidly at both national and international levels. Papayas also stand out, having recorded the highest growth in exports over the past decade, with an increase of more than 17 per cent in volume. Citrus fruits record a decline in production, apart from grapefruit. Total citrus output is estimated to be 10 per cent lower than in 2024 and 14 per cent below the five-year average. Orange production fell by 11.5 per cent year-on-year to 2.72 mn tonnes, causing Spain to lose its position as the leading orange producer in the Northern Hemisphere to Egypt. This decline is mainly the result of excessive spring rainfall, high temperatures during critical stages of fruit development, and hailstorms in several producing regions. Despite this contraction, the market has moved towards a more balanced situation following years of significant post-harvest losses, with supply now more closely aligned with demand.

Overall, Spain closes 2025 with a highly satisfactory agricultural trade balance, reinforcing the resilience and competitiveness of its agri-food sector.

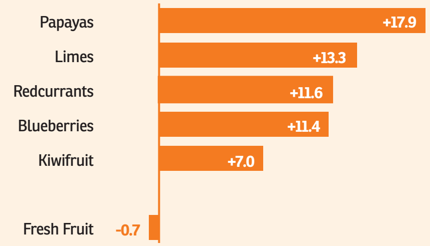
TOP 5 FRESH VEGETABLE EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2015-2024)



TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2015-2024)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	441	469	490	504
Avocados	210	242	262	311
Apples	225	235	219	226
Oranges	117	234	226	146
Other	1,022	1,038	1,007	1,131
TOTAL	2,015	2,219	2,204	2,318

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes [1]	186	238	210	302
Onions	96	144	125	163
Beans	114	100	117	101
Other	326	322	385	407
TOTAL	721	805	836	973

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Oranges	1,623	1,262	1,210	1,314
Easy peelers	1,252	1,075	1,138	1,077
Watermelons	684	701	790	820
Lemons	642	612	672	608
Melons	343	334	348	381
Nectarines	278	308	339	334
Strawberries	287	253	256	265
Persimmons	120	171	171	157
Peaches	262	145	147	148
Other	1,237	1,463	1,527	1,571
TOTAL	6,728	6,324	6,598	6,674

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Lettuce	805	819	845	842
Peppers	796	720	804	766
Cucumbers	694	678	747	762
Tomatoes	635	573	675	590
Brassicas	502	474	519	515
Courgettes	354	381	408	411
Onions	313	291	320	260
Aubergines	151	177	190	177
Garlic	165	150	142	137
Other	570	590	638	114
TOTAL	4,986	4,853	5,289	4,574

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	2,537	3,000	3,329	3,681
Export	8,880	9,225	9,651	10,409
TRADE BALANCE	+6,343	+6,225	+6,322	+6,728

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Import	788	939	1,006	1,111
Export	6,976	7,772	7,809	7,852
TRADE BALANCE	+6,188	+6,832	+6,804	+6,741

Population
38.9 m

Area
491,400 km²

GDP per Inhabitant
19,600 EUR

GDP Growth
-0.4 per cent

Unemployment
3.0 per cent

CPI for Food
(2015=100)
146.5

BULGARIA, CROATIA, HUNGARY, ROMANIA

In 2025, spring frosts severely affected fruit blossoms in south-east European countries, leading to significant yield losses, following a drought in the summer of 2024 which already reduced fruit and vegetable harvests. Severe and widespread frosts in March and April caused massive damage to fruit production. Croatia was the least affected, but its contribution to the region's fruit harvest is minor. In Hungary, cherries were hit hardest, with yield losses estimated at 80-90 per cent. Romania also experienced substantial cherry losses, while apricots and plums in Bulgaria and Romania were heavily affected. Other fruit types also suffered varying degrees of losses. Overall, the 2025 fruit harvest in south-east Europe totalled 1.88 mn tonnes, 34 per cent lower than the previous year, which had already seen sub-optimal yields.

The spring frosts did not impact vegetable harvests, but the summer of 2025 was marked by another prolonged drought. This particularly affected sweetcorn in Hungary, with yields down by 18 per cent compared to 2024. Overall, vegetable production in south-east Europe declined by just 1 per cent, reaching 2.71 mn tonnes. Exports of fruits and vegetables remained low relative to production. In 2025, 345,000 tonnes of fruit were exported, representing 18 per cent of the total fruit harvest, a 12 per cent decrease from the previous year due to smaller yields, especially for cherries and plums. Vegetable exports, however, rose by 6 per cent, accounting for nearly 10 per cent of total production.

The self-sufficiency rate for fruit in 2025 was approximately 55 per cent, a 10 per cent drop from 2024 due to reduced harvests. For vegetables, the self-sufficiency rate has shown a slight downward trend over the past four years, reaching 77 per cent in 2025. All four countries analysed have a negative trade balance for fruits and vegetables, importing more than they export. The trade deficit for fresh fruit was approximately €1.67 bn, while for vegetables, it was €756 mn.

Regarding economic development, south-east Europe presented a mixed picture in 2025. Croatia achieved solid growth of 2.9 per cent, driven by private consumption and real wage increases. Bulgaria benefited from EU funding for infrastructure and energy projects. Romania experienced recovery despite high inflation, supported by EU investments. Hungary, however, faced budget cuts and weaker growth. Overall, the region outpaced the Eurozone in growth, fuelled by consumption and EU funds. In 2025, the cost of living in Hungary, Romania, Bulgaria, and Croatia remained relatively low compared to the EU average but continued to rise. Key drivers included increasing energy prices and higher food costs. Hungary saw the sharpest rise in housing costs due to soaring property prices. Despite affordability compared to western Europe, rising expenses burdened households across the region.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bulgaria	**343**	**308**	**381**	**267**
– Plums	57	58	61	29
– Cherries	58	50	54	25
Croatia	**155**	**163**	**170**	**160**
– Apples	57	66	66	48
– Easy peelers	42	44	31	36
Hungary	**678**	**816**	**777**	**389**
– Apples	350	486	377	197
– Sour cherries	66	56	63	13
Romania	**1,674**	**1,656**	**1,526**	**1,066**
– Apples	543	534	487	447
– Plums	666	645	603	181
Total	**2,850**	**2,943**	**2,855**	**1,882**

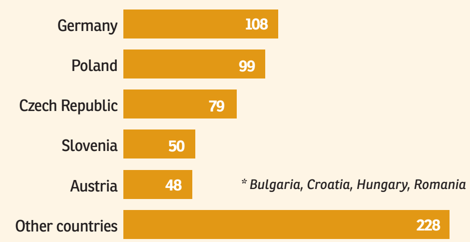
FRESH VEGETABLES	2022	2023	2024	2025p
Bulgaria	**352**	**360**	**367**	**338**
– Tomatoes [2]	126	116	128	90
– Peppers	47	52	57	53
Croatia	**131**	**128**	**131**	**133**
– Cabbage	26	29	24	26
Hungary	**1,120**	**1,300**	**1,216**	**1,140**
– Sweetcorn [1]	393	510	425	350
– Tomatoes [2]	138	177	184	186
– Peppers	85	91	97	98
Romania	**1,255**	**1,198**	**1,024**	**1,100**
– Cabbage	387	357	289	310
– Tomatoes	299	272	242	241
– Onions	145	143	128	130
Total	**2,857**	**2,986**	**2,738**	**2,711**

1) Mainly grown for processing. 2) Including products grown for processing.

***Sources:** AMI-informiert.de; Eurostat; Croatian Bureau of Statistics; Hungarian Central Statistical Office; WAPA; trade.gov*

FRUIT AND VEGETABLE EXPORTS 2024

BY SOUTHEAST COUNTRIES* ('000 TONNES)



** Bulgaria, Croatia, Hungary, Romania*

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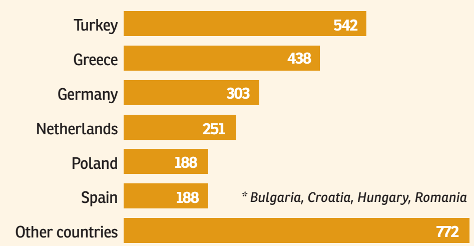


** Bulgaria, Croatia, Hungary, Romania*

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bulgaria	**381**	**383**	**381**	**389**
– Bananas	63	70	68	73
Croatia	**260**	**291**	**308**	**299**
– Bananas	88	91	100	91
Hungary	**336**	**312**	**324**	**322**
– Bananas	83	89	94	84
Romania	**852**	**872**	**897**	**888**
– Bananas	231	224	225	233
Total	**1,828**	**1,858**	**1,910**	**1,898**

FRESH VEGETABLES	2022	2023	2024	2025p
Bulgaria	**235**	**244**	**236**	**250**
– Tomatoes	90	99	98	99
– Peppers	26	30	28	32
Croatia	**138**	**152**	**165**	**165**
Hungary	**169**	**195**	**201**	**185**
– Cucumbers	22	27	26	28
Romania	**387**	**420**	**463**	**456**
– Tomatoes	84	93	102	97
– Onions	62	64	58	64
Total	**929**	**1,011**	**1,066**	**1,057**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bulgaria	**75**	**68**	**77**	**68**
Croatia	**98**	**118**	**112**	**104**
– Easy peelers	30	36	28	31
Hungary	**128**	**154**	**169**	**138**
– Watermelons	30	54	68	58
Romania	**46**	**36**	**32**	**36**
Total	**347**	**376**	**391**	**345**

FRESH VEGETABLES	2022	2023	2024	2025p
Bulgaria	**35**	**37**	**32**	**38**
Croatia	**29**	**35**	**33**	**34**
Hungary	**88**	**111**	**110**	**111**
Romania	**72**	**63**	**69**	**75**
– Cucumbers	36	38	39	43
Total	**224**	**245**	**244**	**258**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	1,443	1,718	1,923	2,035
Export	287	346	381	363
TRADE BALANCE	**-1,156**	**-1,372**	**-1,542**	**-1,673**

FRESH VEGETABLES	2022	2023	2024	2025p
Import	845	1,087	1,169	1,181
Export	358	417	400	425
TRADE BALANCE	**-486**	**-670**	**-768**	**-756**

Population
85.4 m

Area
783,000 km²

GDP per Inhabitant
12,080 EUR

GDP Growth
3.2 er cent

Unemployment
5.0 per cent

CPI for Food
(2015=100)
905.2*

*different methodology, not comparable with EU countries

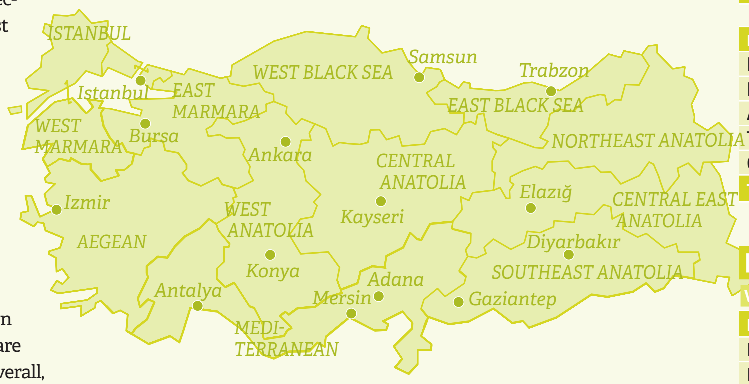
TURKEY

Turkey is among the top 10 most important countries of origin for vegetable imports into the EU-27. In extra-EU trade, Turkey ranks as the second-most important origin after Morocco. For fruit, Turkey's significance for the EU-27 is somewhat lower, but it still ranks among the top 20 origins. Measured against production, Turkey's fruit and vegetable exports are below average. Last year, only about 4 per cent of the vegetable harvest was exported. For fruit, the share of the harvest exported is slightly higher, at just over 12 per cent.

The year 2025 was particularly challenging for fruit producers in Turkey. While the vegetable harvest largely reached the previous year's level, the fruit harvest was 24 per cent lower than the prior year. Spring frosts severely affected the blossoms of pome and stonefruit, leading to massive yield losses. Pome fruit accounts for about one-third of Turkey's total fruit harvest. Initially, apple yield losses were estimated at nearly 40 per cent compared to the previous year, but in a second estimate, the decline was revised to almost 50 per cent. Stonefruit, particularly apricots and sweet cherries, were even more severely affected, with harvest volumes dropping by up to 74 per cent compared to the previous year. Yield losses were also observed for nuts, which are significant not only for the fresh market but also as an important raw material for the processing industry. Citrus was somewhat less affected. The lemon harvest is expected to be 20 per cent lower than the previous year, while orange production is down by about 13 per cent. In contrast, easy peelers are expected to match the previous year's level. Overall, the fruit harvest for 2025 is estimated at 20.8 mn tonnes, nearly 7 mn tonnes less than the previous year. In contrast, the vegetable harvest, at around 28 mn tonnes, nearly matches the previous year's level. A key focus of production lies in fruit vegetables, particularly tomatoes, some of which are also destined for processing. Among fruit vegetables, onions and carrots are also significant in terms of volume.

The lower harvest volumes, particularly in the fruit segment, have led to rising consumer prices in Turkey. Inflation rates were already high even without the additional impact of weather conditions. Not only did Turkish consumers feel the effects of the reduced harvest volumes, but the weather-related yield losses also left their mark on exports. Preliminary data indicates that Turkey exported approximately 2.6 mn tonnes of fresh fruit in 2025, around 17 per cent less than the previous year. Exports of stonefruit, such as sweet cherries, apricots, and peaches, were particularly affected, as were exports of nuts and apples. In contrast, vegetable exports, at nearly 1.1 mn tonnes, largely matched the previous year's level. A decline in export volumes for tomatoes and courgettes was offset by larger volumes of onions and carrots.

Due to its climatic conditions, Turkey can cultivate a wide variety of fruits and vegetables. As a result, it is only minimally dependent on imports. For many types of fruits and vegetables, a self-sufficiency rate of over 100 per cent is achieved.



PRODUCTION

VOLUME ('000 tonnes)

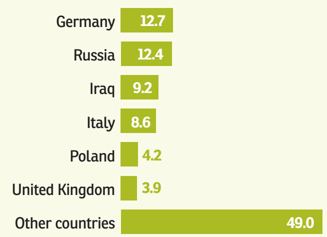
FRESH FRUIT [1]	2022	2023	2024	2025p
Watermelons	3,395	3,148	3,198	3,465
Grapes	4,165	3,400	3,468	2,620
Apples	4,818	4,603	4,420	2,287
Easy peelers	1,865	2,953	1,988	2,130
Sugarmelons	1,587	1,403	1,479	1,737
Oranges	1,322	2,311	1,610	1,368
Lemons	1,323	2,326	1,730	1,128
Peaches, Nectarines	1,008	1,077	1,179	642
Pomegranates	681	639	703	632
Strawberries	728	677	606	595
Apricots	803	750	1,269	331
Sweet cherries	656	737	727	213
Other	4,843	3,718	5,095	3,660
TOTAL	27,195	27,741	27,472	20,808

FRESH VEGETABLES [1 2 3]	2022	2023	2024	2025p
Tomatoes	13,000	13,300	14,617	13,500
Onions	2,350	2,600	2,632	2,700
Cucumbers	1,939	1,872	1,743	1,709
Peppers	1,537	1,479	1,487	1,500
Aubergines	781	818	827	875
Carrots	789	778	892	858
Other	6,212	6,391	6,697	6,972
TOTAL	26,607	27,237	28,895	28,113

1) Including open field and protected production. 2) Excluding potatoes. 3) Including Mushrooms.
Sources: Ministry of Agriculture and Forestry; Turkish Statistical Institute

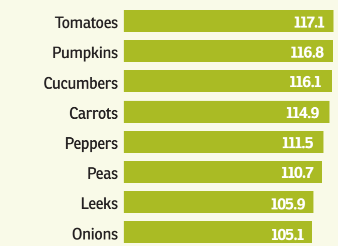
FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION (%, 2024)



TOP 8 VEGETABLES 2023/24

DEGREE OF SELF-SUFFICIENCY (%)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	53	53	67	201
Dates	44	54	64	63
Watermelons	51	40	33	51
Easy peelers	52	56	8	30
Oranges	44	31	1	23
Other	147	167	197	242
TOTAL	391	401	369	610

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Headed cabbage	3.1	0.1	1.4	8.7
Butterhead lettuce	1.7	0.4	2.3	5.4
Artichokes	4.0	3.9	3.1	1.1
Tomatoes	1.0	0.6	0.7	0.2
Other	2.1	1.3	7.2	20.7
TOTAL	11.9	6.3	14.7	36.2

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Easy peelers	881	972	695	868
Lemons	593	658	576	418
Apples	380	371	317	179
Oranges	316	213	234	148
Hazelnuts	181	152	183	147
Watermelons	144	107	101	144
Grapes	223	143	115	120
Peaches	110	116	122	49
Other	859	763	767	505
TOTAL	3.687	3.494	3.110	2.578

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes	520	586	492	427
Onions	184	121	94	154
Peppers	146	173	154	153
Carrots	105	111	86	91
Courgettes	64	64	83	78
Cucumbers	85	77	64	72
Other	156	139	114	108
TOTAL	1,260	1,270	1,087	1,083

TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2022	2023	2024	2025p
Import	471	540	623	940
Export	3,104	3,267	3,840	3,418
TRADE BALANCE	2,634	2,726	3,217	2,478

FRESH VEGETABLES	2022	2023	2024	2025p
Import	4	3	8	21
Export	766	1,013	871	1,054
TRADE BALANCE	763	1,010	863	1,033

Population
69.9 m

Area
244,400 km²

GDP per Inhabitant
48,650 EUR

GDP Growth
3.2 per cent

Unemployment
4.3 per cent

CPI for Food
(2015=100)
132.0

UNITED KINGDOM

The area used for fruit and vegetable cultivation in the United Kingdom has been steadily declining since 2020, falling to just under 130,000 hectares in 2024. Of this, just under 96,600 hectares were used for vegetable cultivation and 30,600 hectares for fruit trees and berries. In 2024, about 2,600 hectares were used for horticulture under protection. England accounts for the largest share of open-air cultivation, with 90 per cent for fruit and 78 per cent for vegetables. However, the share of protected cultivation in England is only 21 per cent. Estimates for England are already available for 2025.

The area used for fruit trees, vines and berry bushes decreased by 4.2 per cent to just under 27,000 hectares. Of this, fruit orchards accounted for a good 17,000 hectares, just under 3 per cent less than in the previous year. Plums recorded the highest percentage loss with an 18 per cent decline in area. Slightly more strawberries (+4.8 per cent) and raspberries (+2.5 per cent) were grown. In contrast, the area under cultivation for wine (-14 per cent) and other berry crops (-13 per cent) declined significantly.

Vegetables were grown on an area that was 7.8 per cent larger, covering a good 79,000 hectares in 2025. Peas and beans for the fresh market, as well as vegetables in general, were grown on a larger scale than in the previous year. In contrast, the area under peas for industrial use was reduced by 14 per cent. Onions (-1 per cent) and carrots (-9 per cent) were also grown on a smaller area. The cultivation of fruit vegetables and salads in greenhouses also declined by just under 3 per cent, having expanded in the previous year.

Larger yields were probably only possible with sufficient irrigation. Even more than mainland central Europe, the UK was affected by drought this year. The first five months of 2025 saw below average rainfall. Spring concluded as the UK sixth driest and England's second driest spring since 1836. The period from March to August, saw less than 50 per cent of average rainfall fairly widely across southern and central England, with some areas below 40 per cent, according to the British Meteorological Office (MET). Northern Ireland was the exception, recording 114 per cent of its average due to rain in mid-April. In addition, the hottest summer since records began in 1884 was recorded, according to the MET Office. In May, the UK called on farmers to conserve water supplies.

On 28 October this year, preliminary data showed that England had only received 61 per cent of its expected annual rainfall, whereas it should normally have been around 80 per cent at this time of year (based on the average from 1991 to 2020). Rainfall in September and October helped to improve reservoir levels, particularly in parts of northern England. Although pressure on agriculture was somewhat eased, soils in parts of eastern England remained very dry in November, so concerns remained about winter reservoir replenishment for next year's irrigation. The cooler and wetter conditions in autumn led to 66 restrictions on water abstraction licences being lifted (399 restrictions remained in place at the beginning of November).

PRODUCTION

VOLUME ('000 tonnes)

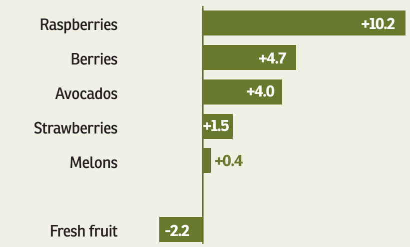
FRESH FRUIT	2022	2023	2024	2025p
Apples [1]	219	169	194	178
Strawberries	122	106	99	104
Pears [1]	18	16	20	20
Raspberries	18	16	16	16
Blackcurrants	13	12	15	12
Cherries	4	5	6	5
Blueberries	5	5	4	5
Plums	6	5	5	4
Other soft fruit	6	5	5	4
Other	259	244	216	208
TOTAL	669	583	580	556

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Carrots	780	726	785	763
Onions	324	325	272	333
Peas [3]	161	156	166	150
Cabbage	141	132	132	149
Lettuce	92	91	97	95
Cauliflower	82	76	92	88
Turnips/Swedes	86	86	77	78
Mushrooms	84	80	77	78
Parsnips	74	68	71	70
Broccoli	64	64	73	65
Other	271	299	266	305
TOTAL	2,135	2,060	2,108	2,174

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

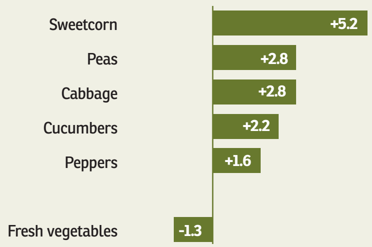
TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2015-2024)



TOP 5 FRESH VEGETABLE IMPORTS [2]

VOLUME GROWTH (% p.a. 2015-2024)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Bananas	885	881	848	875
Melons	301	282	320	320
Apples	322	285	326	311
Easy peelers	293	297	304	300
Table grapes	272	259	273	276
Oranges	252	211	228	235
Lemons/Limes	147	149	154	147
Avocados	116	120	134	144
Pineapples	112	110	113	110
Other	577	554	598	516
TOTAL	3,277	3,148	3,298	3,234

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Tomatoes	385	369	396	380
Onions	369	386	407	373
Peppers	218	210	228	220
Cucumbers	201	181	191	185
Cauliflower/Broccoli	130	145	144	151
Lettuce	133	125	128	119
Mushrooms	98	99	104	100
Sweetcorn	57	64	62	64
Other	454	485	518	525
TOTAL	2,044	2,063	2,178	2,117

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2022	2023	2024	2025p
Avocados	8	10	10	10
Apples	11	9	9	8
Table grapes	2	2	2	2
Other	17	15	13	13
TOTAL	38	36	34	33

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Carrots/Turnips	13	12	15	12
Mushrooms	10	9	9	9
Cauliflower/Broccoli	6	7	9	7
Other	67	47	42	43
TOTAL	96	75	75	71

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2022	2023	2024	2025p
Import	4,519	4,860	5,271	5,420
Export	74	84	84	87
TRADE BALANCE	-4,445	-4,776	-5,187	-5,333

FRESH VEGETABLES [2]	2022	2023	2024	2025p
Import	3,180	3,736	3,653	3,995
Export	99	98	108	111
TRADE BALANCE	-3,081	-3,638	-3,545	-3,885

WORLD

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