



FRUIT LOGIS TICA

2022

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EUROPEAN STATISTICS HANDBOOK

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

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EUROPEAN STATISTICS HANDBOOK



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What is the new normal ?

In 2021, old challenges linked to the coronavirus pandemic were joined by new ones, specifically price increases and a lack of raw materials and logistics services. Plus, although the fresh fruit and vegetable sector is used to climate risks, weather-related challenges seemed more extreme: heatwaves in southern Europe and torrential rain in western Europe caused crop failures, while frosts hit stonefruit trees in blossom and decimated the harvest.

Out-of-home consumption recovered to a certain extent in all countries last year, but did not return to its previous level. Thus, a further increase in retail sales was not to be expected, and indeed preliminary results tend to show the same or slightly lower figures. However, higher retail prices meant an increase in consumer spending. Rising fresh food prices are a popular topic in the media, even though the impact of energy prices on inflation is much bigger.

For producers and exporters, on the other hand, higher prices for inputs and logistics are the main problem. Price increases affect virtually all inputs – from fertilisers to packaging – and seafreight rates have risen sharply, especially on routes to and from Asia.

But it is not all doom and gloom. The impact of Brexit on trade flows has been very small, even if a lot more paperwork is now required. And, as in the previous year, Europe's fresh produce sector managed to supply the population with healthy fruit and vegetables without any major disruption. That blessing could also turn out to be a curse, of course, because with ample supply it will be hard to push through the price increases needed to keep value chains viable.



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Population
447.2 m



Area
4,381,300 km²



GDP per Inhabitant
29,890 EUR



GDP Growth
-5.9 per cent



Unemployment
4.5 per cent



CPI for Food
(2015=100)
105.8

EUROPEAN UNION

Fruit and vegetable markets in Europe faced three major issues again in 2021: The weather, the continued Coronavirus pandemic, and the rising costs of transport and production. During the summer months, consumers had more options to eat out or take a vacation as restrictions to combat Covid were lifted. But the fourth and fifth waves of infection led to new limits being imposed by the autumn. Household fruit and vegetable purchasing, which was boosted by previous lockdowns and increased significantly in 2020, generally did not increase further in 2021.

The pandemic has upset global commodity flows in a way not seen before. Container freight rates have risen noticeably. In addition, fuel has become significantly more expensive over the past 12 months, making shipments even more expensive. At times, raw materials for

production and packaging have been in short supply, so they have risen in price. This is a situation that was not seen in previous years. In contrast, unfavorable weather conditions are nothing new for the produce business. However, their increasing severity is notable: heatwaves and periods of drought are becoming longer; rainfall is more often extreme and sudden, which leads to floods. Be it lack of rain or too much, both were seen in 2021. That said, overall water supply was better than in previous years.

Limited and expensive transport capacity has not yet had a massive effect on foreign trade in fruit and vegetables. For both intra- and extra-EU trade in 2021, import and export volumes were only slightly lower than in the previous year. In some cases, in fact, they were slightly higher. The fear that exports to the UK would collapse after Brexit did not materialise either. Although the EU-27 sent smaller quantities to the UK than they did before Brexit, the decline was moderate, with vegetables down 2 per cent and fruit down 7 per cent. More memorable were the images of empty supermarket shelves in the UK, partly due to longer waiting times for border clearance. A bigger problem, however, was the national transport of goods due to a lack of truck drivers. This is a problem that could affect other countries more in the future. EU countries that previously delivered the largest quantities to the UK have lost more. For vegetables, these are Spain (-5 per cent) and The Netherlands (-3 per cent). For fruit, leading supplier Spain exported a slightly larger volume to the UK, but that was compared to a comparatively low volume in 2020. The Netherlands (-33 per cent) in particular, but also France (-4 per cent), lost out significantly.

The UK's departure from the EU has led to one key change in terms of the foreign trade balance. In previous years, the foreign trade balance showed a deficit for both fruit and vegetables. This deficit still exists for fruit, but the foreign trade balance for vegetables is now slightly positive. In any case, imports of fresh fruit into the EU are significantly larger than its vegetable imports. Bananas and other exotic fruits not widely grown in the EU must be imported in large volume. The bloc's fresh fruit imports (both internal and external) fell slightly in

Continued on page 4



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	13,056	10,578	10,509	11,544
Oranges	6,515	6,102	6,387	6,310
Watermelons	3,192	3,010	3,086	3,219
Easy peelers	2,776	2,894	3,155	3,100
Peaches	2,640	2,764	2,493	2,278
Melons	1,791	1,723	1,720	1,993
Table grapes	1,788	1,747	1,745	1,724
Pears	2,335	1,939	2,219	1,589
Nectarines	1,198	1,285	990	855
Other	10,886	9,248	9,346	8,621
TOTAL	46,177	41,290	41,651	41,235

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Onions, dry	5,332	6,649	6,252	6,890
Tomatoes ²	6,752	6,263	6,238	6,170
Carrots	4,480	4,737	4,693	4,561
Cabbage	3,258	3,273	3,108	3,139
Peppers	2,656	2,844	2,908	3,129
Cucumbers	2,291	2,381	2,400	2,534
Lettuce	2,327	2,402	2,346	2,022
Cauliflower	2,237	2,157	2,175	1,760
Courgettes	1,536	1,552	1,651	1,417
Other	15,551	16,211	16,453	16,446
TOTAL	46,421	48,469	48,224	48,068

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

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

PRODUCTION

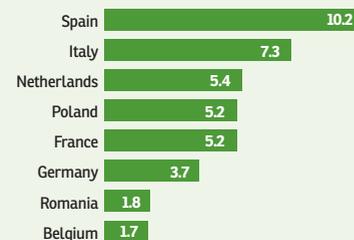
VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Spain	13,858	12,950	13,480	13,000
Italy	11,086	10,486	10,289	9,805
Poland	5,862	3,770	4,304	5,240
Greece	3,408	2,981	3,155	2,774
France	3,013	3,108	2,737	2,602
Romania	2,325	1,930	2,023	2,000
Germany	1,561	1,330	1,329	1,263
Portugal	1,117	1,281	1,159	1,260
Hungary	925	733	575	702
Netherlands	760	752	730	687
Belgium	658	642	626	648
Bulgaria	357	361	312	330
Austria	284	225	193	188
Croatia	212	177	167	180
Czechia	189	130	143	142
Cyprus	118	105	86	85
Slovenia	106	70	84	83
Sweden	49	41	49	48
Denmark	52	43	58	47
Slovakia	55	47	39	38
Lithuania	94	42	36	35
Ireland	26	26	19	19
Other EU	61	60	57	56
TOTAL	46,177	41,290	41,651	41,235

FRESH VEGETABLES ³	2018	2019	2020	2021p
Spain	9,868	10,391	10,151	10,500
Italy	7,179	7,407	7,345	6,955
Netherlands	4,626	5,484	5,383	5,615
Poland	5,601	5,354	5,243	5,020
France	5,076	5,263	5,160	4,981
Germany	3,255	3,707	3,693	3,767
Romania	2,031	1,865	1,806	1,800
Belgium	1,620	1,777	1,726	1,727
Hungary	1,640	1,717	1,701	1,656
Greece	1,660	1,445	1,583	1,540
Portugal	799	794	1,101	1,100
Austria	563	611	644	675
Bulgaria	453	431	343	400
Sweden	308	346	395	386
Denmark	307	300	303	321
Finland	267	294	297	296
Czechia	199	226	252	252
Ireland	204	219	222	221
Lithuania	208	230	220	219
Croatia	156	144	187	170
Slovenia	100	119	136	136
Slovakia	103	122	115	115
Other EU	199	222	217	216
TOTAL	46,421	48,469	48,224	48,068

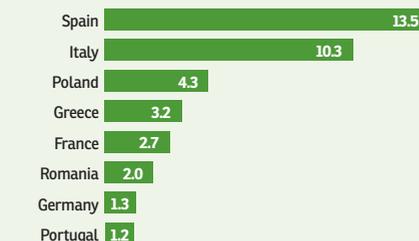
TOP 8 VEGETABLE PRODUCERS 2020³

(million tonnes)



TOP 8 FRUIT PRODUCERS 2020

(million tonnes)



EUROPEAN UNION

2021. Germany, the leading importer in 2020, imported less, so the Netherlands moved into first place. However, the Netherlands is also the second-largest fruit exporter behind Spain, and not all the volume exported from the

IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	3,014	3,078	3,141	3,246
Apples	1,940	1,891	1,923	1,897
Oranges	1,685	1,737	1,813	1,682
Easy peelers	1,379	1,398	1,437	1,440
Watermelons	1,320	1,353	1,394	1,335
Table grapes	854	857	914	901
Lemons	733	828	887	820
Pears	743	731	692	717
Avocados	375	414	503	511
Other	5,052	5,196	4,878	4,791
TOTAL	17,095	17,482	17,581	17,340

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Tomatoes	2,163	2,148	2,068	1,976
Onions	1,159	1,192	1,181	1,182
Cucumbers	1,100	1,124	1,158	1,118
Lettuce	1,098	1,105	1,055	1,076
Peppers	1,066	1,061	1,106	1,075
Carrots	1,015	1,044	1,001	980
Cauliflower	420	415	431	439
Courgettes	369	399	420	417
Mushrooms	292	299	308	308
Other	2,749	2,754	2,806	2,864
TOTAL	11,430	11,540	11,533	11,436

EXPORTS – INTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	3,040	3,068	3,008	3,022
Oranges	2,022	2,066	2,146	2,030
Apples	1,848	1,878	1,890	1,840
Easy peelers	1,509	1,539	1,528	1,587
Other	9,189	9,572	9,440	9,642
TOTAL	17,607	18,123	18,011	18,120

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Tomatoes	2,246	2,240	2,154	2,132
Lettuce	1,236	1,229	1,188	1,235
Peppers	1,107	1,167	1,187	1,171
Onions	1,163	1,312	1,170	1,171
Other	5,991	6,186	6,204	6,319
TOTAL	11,744	12,133	11,904	12,027

Netherlands is produced there. Fruit exports from the EU were slightly higher compared with 2020. For vegetables, Germany maintained its position as the number-one importer, although it brought in a smaller quantity than in the previous year. Overall, a slightly larger volume of vegetables was imported into the EU. Exports, on the other hand, were slightly below the previous year's level.

The share of extra-EU trade is comparatively high for fruit at 41 per cent. Bananas, pineapples, avocados and mangoes in particular are imported from countries outside the EU. Bananas are by far the most important fruit category imported into the EU. Around 62 per cent come from countries outside the EU. In contrast, intra-EU trade dominates for oranges and apples. Fruit exports remain for the most part within the EU. However, Brexit has shifted the ratios somewhat in favour of third-country trade. In 2021, almost 18 per cent of fruit exports left the EU. In terms of volume, bananas, apples and oranges dominate exports.

For fresh vegetable imports, the share of extra-trade is much lower than for fruit, at just under 16 per cent. Tomatoes and onions have the highest share of imports from outside the EU among the vegetables imported in the largest volumes. The main imports from outside the EU are tomatoes from Morocco and onions from New Zealand. 78 per cent of vegetable exports remained within the EU in 2021. A year before, when the UK was still a member state, 89 per cent of vegetable exports were intra-trade. Exports are heavily dominated by onions, followed by tomatoes and peppers.

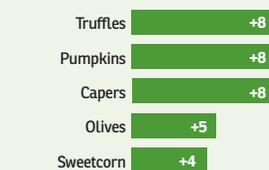
Overall, last year's fruit and vegetable harvest in the EU-27 was about 1 per cent lower than the year before, according to preliminary data; the trends for individual fruit and vegetable types largely cancel each other out. Fruit losses had been estimated to be significantly higher, but ultimately the harvest was only 1 per cent smaller year on year. A large apple harvest compensated for negative trends for several other kinds of fruit. Production of peaches, nectarines and apricots was hit by frosts during bloom in southern Europe. The previous year's crop had also fallen victim to frost in certain areas, and a repeat of this scenario was considered unlikely. Nevertheless, cold spells in January, March and April led to severe losses, leading to the smallest harvest in

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TOP 5 FRESH VEGETABLE IMPORTS*

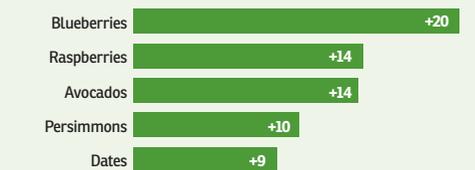
VOLUME GROWTH (% p.a. 2011-2020)



Fresh Vegetables +2 * Intra-EU and Extra-EU Trade.

TOP 5 FRESH FRUIT IMPORTS*

VOLUME GROWTH (% p.a. 2011-2020)



Fresh Fruit +4 * Intra-EU and Extra-EU Trade.

IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	5,119	5,044	5,292	5,244
Oranges	915	822	930	872
Pineapples	895	881	775	822
Avocados	533	532	604	654
Table grapes	518	520	498	569
Easy peelers	348	341	411	430
Watermelons	351	373	421	420
Lemons	434	332	391	409
Apples	439	366	360	348
Other	2,225	2,177	2,333	2,307
TOTAL	11,777	11,387	12,015	12,075

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Tomatoes	576	583	621	669
Onions	250	536	275	304
Peppers	210	201	220	234
Cucumbers	71	72	100	124
Carrots	122	112	79	73
Courgettes	63	64	59	60
Mushrooms	19	30	30	28
Lettuce	19	21	16	16
Cauliflower	9	12	11	10
Other	540	555	561	588
TOTAL	1,878	2,187	1,972	2,106

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	1,020	1,462	1,071	1,158
Oranges	404	460	396	384
Easy peelers	378	372	355	349
Avocados	91	94	103	95
Other	2,092	2,210	2,036	1,942
TOTAL	3,986	4,598	3,960	3,927

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Onions	1,093	1,062	1,333	1,189
Tomatoes	482	461	442	387
Peppers	293	321	318	287
Lettuce	262	253	246	245
Other	1,279	1,277	1,262	1,284
TOTAL	3,410	3,374	3,602	3,392

1) Excluding potatoes.

Sources: AMI-Informiert.de; Eurostat

EUROPEAN UNION

30 years. Production of oranges and easy-peelers was also initially estimated to be significantly lower than the previous year due to unfavorable conditions. Spain forecast a smaller harvest due to adverse weather, albeit some regions were better able to avoid the damage.

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Netherlands	5,034	5,154	5,391	5,531
Germany	5,391	5,456	5,662	5,226
France	3,450	3,433	3,429	3,575
Belgium	2,409	2,164	2,245	2,222
Spain	1,833	1,752	1,839	1,971
Italy	2,004	2,061	2,062	1,953
Poland	1,579	1,616	1,706	1,682
Portugal	869	841	903	890
Romania	780	804	815	826
Austria	696	708	719	673
Sweden	653	666	679	652
Other	4,173	4,215	4,145	4,215
TOTAL	28,872	28,868	29,596	29,415

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Spain	7,156	7,929	7,487	7,583
Netherlands	4,088	4,208	4,333	4,336
Italy	2,585	2,669	2,616	2,643
Belgium	1,992	2,015	1,878	1,777
Greece	1,233	1,268	1,363	1,280
Poland	1,087	1,283	995	1,215
France	1,035	957	970	930
Germany	603	609	621	647
Portugal	502	509	536	489
Slovenia	154	181	197	199
Austria	176	217	207	188
Other	983	876	769	760
TOTAL	21,593	22,721	21,972	22,048

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	29,973	30,303	33,440	32,710
Export	23,070	23,748	25,797	25,643
TRADE BALANCE	-6,903	-6,555	-7,643	-7,067

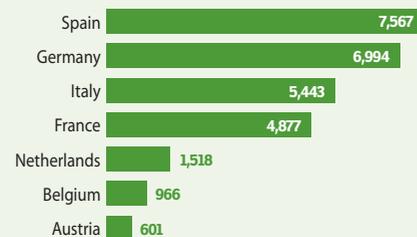
Ultimately, losses across Europe did not prove as severe as expected. According to preliminary data, the orange harvest was only 1 per cent below the previous year's, while easy-peeler volume was 2 per cent smaller. After a short EU apple crop in 2020, trees were rested and in full bloom in April/May 2021. It looked like a record-breaking production volume. But frost caused regional failures and, in almost all countries, it was too cold for the blossom. Bee flight was limited, so ultimately fruit set was weak. That said, 11.5m tonnes of apples were harvested, more than in the previous year. Much of the increase came in Poland, which is thus a factor of uncertainty for the European market in the 2021/22 marketing season. Unlike apples, the pear harvest was small across Europe. Italy was affected by frost failures, and this led to the smallest pear harvest in three decades.

The vegetable harvest was more or less the same – just 0.3 per cent down on 2020. Smaller harvests for lettuce, cauliflower and courgettes were offset by a large onion crop. Many countries in Europe were affected by weather extremes. Particularly memorable were the floods in July in parts of Germany and the Benelux. Areas of Spain and Italy also suffered outages and damage caused by intermittent, unusually heavy rainfall and regional flooding. Initially, the vegetable season in central Europe got off to a slow start, due to low temperatures in the spring. Subsequently, there was not as much sunshine as in 2020, which appears to have led to yield losses, particularly for tomatoes, even in protected cultivation. The situation was further aggravated by the emergence of new plant diseases. Cucumbers and peppers seem to have coped better with the conditions, with larger volumes harvested. However, some production has switched from tomatoes to other fruiting vegetables. Rising energy costs are a challenge, especially for greenhouse growing in the Benelux countries.



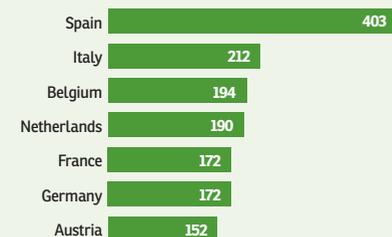
HOUSEHOLD DEMAND 2020¹

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



HOUSEHOLD DEMAND 2020¹

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



IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Germany	3,299	3,366	3,503	3,301
France	1,939	1,907	1,886	1,920
Netherlands	1,401	1,496	1,407	1,532
Belgium	1,096	1,099	1,143	1,146
Poland	614	827	779	764
Spain	648	663	642	678
Italy	651	733	651	639
Czechia	513	480	471	466
Romania	374	363	356	397
Sweden	347	357	348	335
Austria	332	338	314	326
Other	2,093	2,098	2,005	2,037
TOTAL	13,307	13,727	13,505	13,542

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Spain	5,102	5,388	5,415	5,365
Netherlands	4,926	5,027	5,043	4,966
France	997	1,023	1,002	973
Belgium	832	950	973	908
Italy	866	844	862	873
Poland	766	699	689	716
Germany	464	458	417	403
Portugal	251	262	231	280
Austria	162	148	168	185
Greece	140	135	133	157
Hungary	82	77	84	88
Other	567	497	488	506
TOTAL	15,154	15,507	15,505	15,419

TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Import	14,621	15,657	15,976	16,296
Export	15,840	17,010	17,254	17,899
TRADE BALANCE	+1,219	+1,353	+1,278	+1,603

1) Excluding potatoes.

Sources: AMI-Informiert.de; CSO; Ctift; FPI; GfK; Eurostat; Kantar; MAPA



Population
8.9 m



Area
83,900 km²



GDP per Inhabitant
42,540 EUR



GDP Growth
-6.7 per cent



Unemployment
4.1 per cent



CPI for Food
(2015=100)
108.5

AUSTRIA

There are several large vegetable growing areas across Austria. These mainly provide regional supply in larger cities such as Vienna, Innsbruck, Salzburg or Graz. Vegetable production in the Marchfeld near Vienna is worth mentioning here. In addition, there are regions where vegetable production has a long tradition thanks to favourable soil and climate conditions. In Styria, pumpkin seed oil and horseradish (known as Kren) are produced under protected geographical indications.

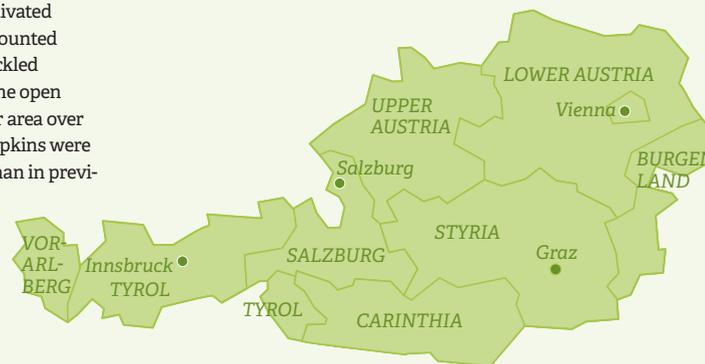
Pulses, root vegetables and bulb vegetables are a focal point of Austrian production. Onions alone account for a quarter of the total vegetable harvest; carrots follow as the second most-important crop in volume terms. For both, the 2021 harvest was above average, which offers sufficient supply on which to fall back during the 2021/22 storage season.

The country's harvested volume of fruit vegetables was also above average last year. This includes tomatoes, cucumbers and peppers, all of which are cultivated primarily in greenhouses. Vine tomatoes accounted for 80 per cent of the overall tomato crop. Pickled cucumbers, most of which are produced in the open air, have been grown in a smaller and smaller area over the past few years. Both sweetcorn and pumpkins were produced in significantly larger quantities than in previous seasons, due to increasing yields and production area. While edible pumpkins were grown on slightly more than 700ha, the larger area used for oilseed pumpkins was estimated at 29,000ha, buoyed by a trend towards more organic production.

Cabbage and leafy vegetables benefited from good weather in autumn. Almost all crops saw larger harvests than in the previous year. Spinach was one of the few exceptions. Due to changes in the varieties grown, harvested volume fell 10 per cent. After a drought in 2020, asparagus had to struggle with cold weather last spring. As a result, output was again low.

For the second year in a row, late frosts reduced Austria's fruit harvest and ultimately led to below-average volume – especially for stonefruit. In contrast, the soft fruit harvest was larger. Traditionally, pears and especially apples play a major role in Austria's fruit industry. Apples accounted for 81 per cent of its total fruit harvest in 2021. However, production of both fruits fell short of the long-term average, which left stocks lower than in previous years. Three-quarters of the country's apples were harvested in Styria.

In soft fruit, blueberries continued their recent commercial growth. Elsewhere, losses were seen in elderberries and chokeberries – crops grown mainly for processing. The harvested volume of elderberries, which are used to make food colouring or textile dyes, was 10 per cent down last year. For chokeberries, which are usually turned into juice, spreads and dyes, the decrease was 25 per cent.



PRODUCTION

VOLUME ('000 tonnes)

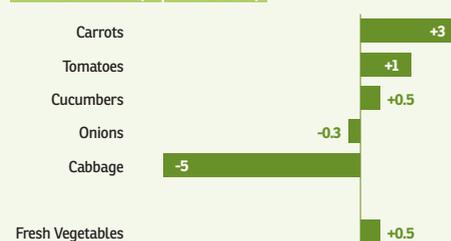
FRESH FRUIT ¹	2018	2019	2020	2021p
Apples	240	184	160	152
Strawberries	11	14	13	14
Pears	13	6	8	8
Apricots	8	10	1	4
Currants	3	3	3	3
Blueberries	1	1	2	2
Plums	3	2	2	2
Sweet cherries	3	2	1	1
Peaches	2	2	1	1
Other	2	1	1	1
TOTAL	284	225	193	188

FRESH VEGETABLES ²	2018	2019	2020	2021p
Onions	132	142	154	169
Carrots	94	108	116	118
Tomatoes	58	58	59	60
Cucumbers	45	45	46	48
Red/white cabbage	30	36	40	41
Iceberg lettuce	17	20	22	23
Sweetcorn	13	13	13	15
Peppers	15	15	15	15
Celeriac	10	12	14	14
Other	147	162	166	173
TOTAL	563	611	644	675

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

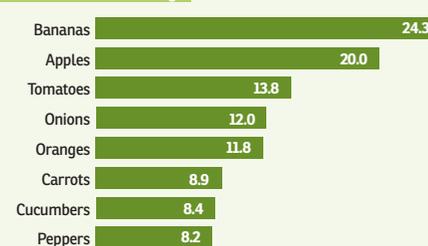
TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2012-2021)



TOP 8 FRUIT AND VEGETABLES 2020

HOUSEHOLD PURCHASES (kg)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	128	140	147	139
Apples incl. cider	116	97	96	84
Table grapes	36	36	40	40
Watermelons	37	35	43	38
Easy peelers	36	38	41	38
Lemons	42	42	40	36
Sweet cherries	18	20	26	26
Pears incl. cider	24	28	22	19
Other	259	272	265	252
TOTAL	696	708	719	673

FRESH VEGETABLES	2018	2019	2020	2021p
Peppers	53	52	55	56
Tomatoes	54	52	47	49
Lettuce	41	43	36	38
Cucumbers/Gherkins	35	28	30	33
Courgettes	17	18	19	19
Kohlrabi, Savoy	14	14	14	15
Mushrooms	15	15	14	13
Onions	9	15	10	12
Other	94	101	89	90
TOTAL	332	338	314	326

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples incl. cider	62	100	64	61
Sweet cherries	15	15	19	21
Table grapes	8	9	10	11
Bananas	15	13	11	9
Other	76	79	103	86
TOTAL	176	217	207	188

FRESH VEGETABLES	2018	2019	2020	2021p
Onions	51	47	57	66
Peppers	27	24	28	30
Tomatoes	13	14	12	16
Cucumbers/Gherkins	20	10	14	15
Carrots	9	17	16	14
Other	50	53	56	58
TOTAL	162	148	168	185

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	827	855	946	904
Export	228	238	291	281
TRADE BALANCE	-599	-617	-655	-623

FRESH VEGETABLES	2018	2019	2020	2021p
Import	525	549	508	524
Export	141	152	143	152
TRADE BALANCE	-384	-397	-365	-372



Population
11.5 m



Area
30,500 km²



GDP per Inhabitant
39,650 EUR



GDP Growth
-5.7 per cent



Unemployment
3.3 per cent



CPI for Food
(2015=100)
108.2

BELGIUM

One of the smaller countries in Europe, Belgium is nevertheless an important hub for European produce imports and exports. Kiwifruit from New Zealand, for example, enters via the seaports of Antwerp and Zeebrugge. Much of the fruit that arrives by ship from overseas is sold outside the country. In value terms, the foreign trade balance for vegetables is almost balanced, while significantly more fruit is imported than exported.

Fruit production, the majority of it in Flanders, is focused primarily on apples and pears. While the area planted with apples fell by 3 per cent per year between 2011/12 and 2021/22, it increased by 2 per cent per year for pears in the same period. Most recently, the area of pear production was almost twice as large as for apples. Strawberries are another mainstay of Belgium fruit production. Strawberry acreage increased by an average of 1 per cent per year between 2010 and 2020.

A large part of Belgium's fruit and vegetable production is marketed through auctions known as veilingen.

According to the Association of Belgian Horticultural Cooperatives (VBT), its members achieved a turnover of €1.08bn in 2020, breaking the one billion-euro mark for the first time. Vegetables accounted for 67 per cent of total sales and fruit for 36 per cent. While exports to other European Union member states are commonplace, gaining market access to third countries remains a challenge. In 2020, two new export destinations were added: Mexico and Thailand. In addition, apples and pears are exported to Brazil, Canada, Colombia, Israel and Vietnam, for example.

Estimates suggest that outdoor cultivation of vegetables for the fresh and processing industries expanded slightly last year, following similar growth in each of the previous years. In 2020, however, the larger areas did not follow that trend. In 2021, it is also questionable whether the larger area under cultivation will also lead to a larger harvest. Parts of Belgium were affected by heavy rainfall in the summer, which led to damage and crop failures.

Belgium is the largest producer of frozen vegetables in Europe, and produced 1.02m tonnes in 2020. Its frozen vegetable exports also rose last year, by 1 per cent to 1.42m tonnes. The majority were sent to other EU countries, mainly Germany, France and the Netherlands. Exports to third countries were led by the UK, followed by the USA.

Private consumption of frozen vegetables in Belgium reached a high of 3.9kg per capita in 2020, which was 200g higher than the previous year. Consumers also made greater use of canned vegetables than in previous years. Here, per-capita consumption of 2.9kg represented a return to the level seen in 2015.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Pears	369	332	393	354
Apples	231	242	168	240
Strawberries	48	50	53	43
Other	10	18	13	12
TOTAL	658	642	626	648

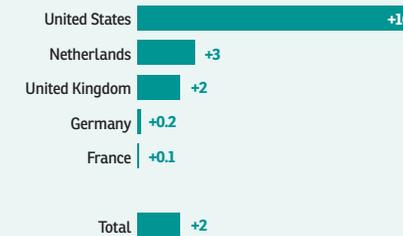
FRESH VEGETABLES ¹	2018	2019	2020	2021p
Tomatoes	259	270	312	300
Leeks	95	109	109	104
Carrots	78	78	67	74
Lettuce	35	34	33	34
Chicory witlof	35	35	32	32
Cucumbers	24	27	28	27
Peppers	26	27	25	25
Courgettes	15	14	12	17
Celeriac	13	17	14	14
Other ²	1,040	1,166	1,094	1,100
TOTAL	1,620	1,777	1,726	1,727

1) Excluding potatoes, open field and under glass.

2) Including products cultivated for processing.

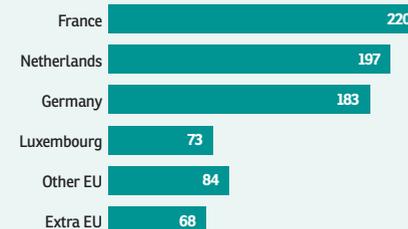
TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2011-2020)



FRESH VEGETABLE EXPORTS 2020

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VBT

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Exotics	1,765	1,581	1,610	1,652
Citrus	219	206	225	215
Apples	147	114	119	110
Pears	57	50	48	50
Other	228	227	222	226
TOTAL	2,416	2,178	2,224	2,253

FRESH VEGETABLES	2018	2019	2020	2021p
Carrots/Turnips	254	266	287	269
Onions/Shallots	114	125	132	120
Peas	114	111	120	115
Green beans	95	89	104	96
Cucumbers	71	69	68	70
Tomatoes	66	81	59	65
Peppers	48	49	52	52
Other	331	325	338	331
TOTAL	1,092	1,116	1,161	787

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Exotics	1,477	1,410	1,141	1,340
Pears	290	313	313	300
Apples	113	197	154	195
Strawberries	45	45	43	40
Other	68	85	75	75
TOTAL	1,992	2,050	1,725	1,950

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	223	255	262	247
Carrots/Turnips	175	230	233	220
Leeks	67	70	71	69
Cucumbers	52	50	47	50
Onions/Shallots	39	44	53	45
Peppers	35	32	33	33
Celeriac	28	25	22	24
Chicory witlof	17	21	17	18
Other	192	248	238	227
TOTAL	829	975	974	933

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	2,596	2,326	2,523	2,580
Export	1,883	2,018	1,801	1,900
TRADE BALANCE	-713	-308	-722	-680

FRESH VEGETABLES	2018	2019	2020	2021p
Import	794	836	854	840
Export	713	792	824	795
TRADE BALANCE	-81	-44	-30	-45



Population
67.4 m



Area
633,200 km²



GDP per Inhabitant
33,960 EUR



GDP Growth
-7.9 per cent



Unemployment
5.0 per cent



CPI for Food
(2015=100)
105.5

FRANCE

France has again struggled with economic crises. Harvested volumes of fruit and vegetables in 2021 are estimated to be lower than they have been for years.

Weather conditions last year had a negative impact on some of the country's crops. Cold temperatures in April and summer heat spikes in the western basin, for example, affected production. In some areas, there was excess rainfall; in others there was not enough. Autumn 2021 was the country's coolest since 2017, and temperatures in November were also below normal. To protect against the risks of climate change, investment in greenhouses and plastic covers is expected to grow

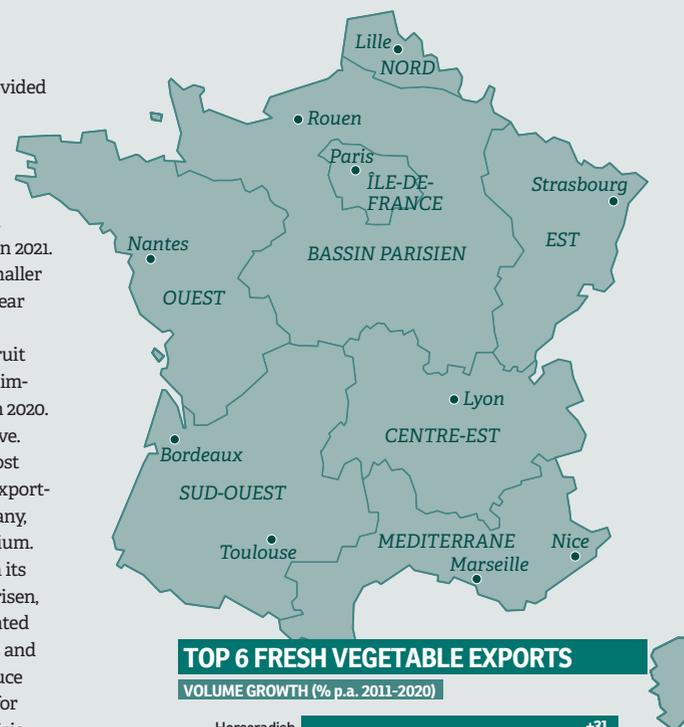
this year. In addition, financial support will be provided to fruit growers, especially those who produce apples, peaches, walnuts, and pears.

AMI estimates France's total fruit harvest for 2021 at around 2.6m tonnes, 12 per cent below the average for the previous three years. Stonefruit in particular suffered from the fluctuating weather in 2021. The vegetable harvest was also estimated to be smaller at around 5m tonnes, 4 per cent below the three-year average.

Along with lower production figures, export fruit and vegetable volumes also fell. At the same time, imported volumes for both increased compared with 2020. As in previous years, the trade balance was negative.

Spain, Germany, and Belgium imported the most fruit and vegetables from France in 2020. France exported 358,000 tonnes to Spain, 289,000 tonnes to Germany, and 236,000 tonnes of fruit and vegetables to Belgium.

France's economic difficulties were reflected in its prices. Looking at 2021, prices for fresh fruit have risen, while those for fresh vegetables fell. Prices fluctuated especially for seasonal fruits, such as plums, pears and grapes. Year-on-year, prices for chicory witlof, lettuce and carrots have fallen significantly, while prices for tomatoes and garlic rose. Due to ongoing Covid crisis, there is a shortage of labour. In October, that shortage affected apple and lettuce markets in particular. The ban on plastic packaging for fruit and vegetables, which comes into force in spring 2022, is a cause of concern for producers. That's because, from 2022 onwards, around 30 types of fruit and vegetables will have to be sold without plastic packaging.



PRODUCTION

VOLUME ('000 tonnes)

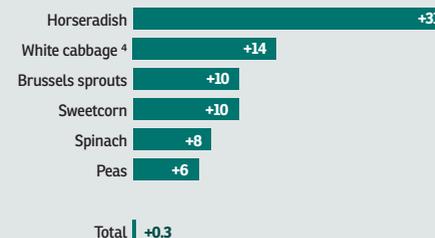
FRESH FRUIT ¹	2018	2019	2020	2021p
Apples	1,477	1,651	1,337	1,375
Bananas	191	218	226	244
Melons	255	248	254	229
Plums ²	175	205	190	193
Peaches	97	106	94	59
Pears	134	121	133	57
Nectarines	82	91	81	57
Strawberries	54	60	55	53
Kiwifruit	54	56	51	52
Apricots	111	135	86	51
Other	383	217	230	232
TOTAL	3,013	3,108	2,737	2,602

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	710	704	643	649
Carrots	535	534	545	561
Onions	510	660	702	514
Sweetcorn	456	447	453	455
Green beans	384	339	340	342
Peas	244	282	255	253
Cauliflower	264	235	235	221
Lettuce	222	216	208	211
Chicory	151	140	152	154
Leeks	152	149	154	152
Other	1,448	1,556	1,473	1,469
TOTAL	5,076	5,263	5,160	4,981

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

TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2011-2020)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2020)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	752	699	738	777
Oranges	489	497	479	463
Clementines	337	346	363	361
Watermelons	202	227	240	254
Avocados	157	165	171	175
Melons	169	175	164	165
Lemons	139	140	149	143
Others	1,204	1,183	1,125	1,235
TOTAL	3,450	3,433	3,429	3,575

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	524	517	508	498
Sweet peppers	156	152	166	167
Carrots	157	154	165	163
Courgettes	144	152	155	149
Onions	140	141	127	125
Cucumbers	75	71	70	65
Others	742	719	695	752
TOTAL	1,939	1,907	1,886	1,920

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	431	381	410	334
Bananas	251	207	182	221
Watermelons	34	41	54	70
Oranges	41	39	46	39
Melons	39	37	33	34
Others	239	252	244	232
TOTAL	1,035	957	970	930

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	224	235	252	244
Cauliflower ³	105	121	109	107
Beans	125	108	113	107
Onions	91	99	104	88
Peas	70	69	65	75
Carrots	72	79	74	58
Other	310	312	286	293
TOTAL	997	1,023	1,002	973

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	3,792	3,790	4,118	4,223
Export	1,204	1,121	1,175	1,154
TRADE BALANCE	-2,588	-2,669	-2,943	-3,069

FRESH VEGETABLES	2018	2019	2020	2021p
Import	2,089	2,187	2,280	2,323
Export	986	1,062	1,077	1,120
TRADE BALANCE	-1,103	-1,125	-1,203	-1,203



Population
83.2 m



Area
357,300 km²



GDP per Inhabitant
40,490 EUR



GDP Growth
-4.6 per cent



Unemployment
2.7 per cent



CPI for Food
(2015=100)
105.8

GERMANY

Fruit and vegetable production in Germany was again affected by weather conditions in 2021. In previous years, dry and hot summers were the biggest challenge for producers. Last year, there was sufficient precipitation, but heavy or prolonged rainfall during the summer months led to crop losses and reduced quality in open-field vegetable production. The start of the German outdoor vegetable season was already delayed. Low temperatures and a lack of sunlight in March and April meant that spring vegetables such as asparagus, rhubarb and spring onions grew only slowly. By July and August, vegetable crops with a short cultivation period – lettuce, for example – were hit hard by the rain. There were shortfalls and yield losses; and prices rose sharply at all trade levels for a short time. Subsequently, the situation has returned to normal.

Vegetables sold in autumn or placed in storage benefited from good water supply, and yields and harvested volumes were high. Lower yields for salads and fine vegetables were more than offset by higher yields for stored vegetables. According to AMI estimates, the 2021 German vegetable harvest will be almost 2 per cent larger than in the previous year at 3.77m tonnes. This contrasts with a smaller fruit harvest. Once again, spring frosts damaged blossoms on stonefruit, apple and pear trees. There were additional losses for stonefruit due to rainy weather during the harvest. Unstable conditions resulted in high losses for strawberries. Overall, the 2021 fruit harvest is estimated at 1.26m tonnes, down 5 per cent compared with the previous year.

Neither fruit nor vegetable imports were able to match the high levels seen in 2020. Limited and more expensive transport options provide only part of the reason for those downturns. For major imported products, smaller volumes were available due to adverse weather and the appearance of new pests and plant diseases in countries of origin. This was particularly the case for stonefruit and citrus. In addition, fewer apples were imported to Germany in the 2020/21 marketing year due to the large harvest in 2020. When it came to vegetables, almost all product groups were imported in smaller volumes. For carrots and onions, this was because domestic supply remained high in the first half of the year. Overall, Germany remains Europe's biggest importer of fresh fruit and vegetables. However, the Netherlands has overtaken Germany in terms of fruit imports. Overall, Germany imported around 7 per cent less fruit in 2021 than in the previous year. For vegetables, the import volume was around 6 per cent smaller than in 2020. The negative trade balance by value improved slightly in 2021.

The Coronavirus pandemic was also an ongoing issue for consumers in Germany last year. However, restrictions were no longer as strict as they were in the previous 12 months. Restaurants reopened, while travel during the summer holidays was also possible. For children, it was back to kindergarten or school, and many workers returned to the office. This meant cooking and eating habits changed again. In fact, it would have been rather surprising if private demand for fruit and vegetables had increased further after such a strong year in 2020. From April onwards, volumes purchased by private households were lower than in the previous year.



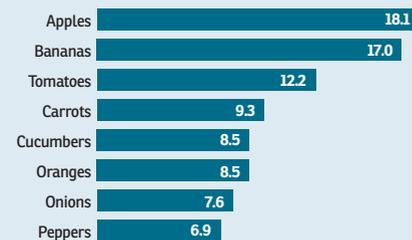
FRESH FRUIT AND VEGETABLE IMPORTS

BY ORIGIN ('000 tonnes, 2020)



TOP 8 FRUIT AND VEGETABLES 2020

HOUSEHOLD PURCHASES (kg)



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2018	2019	2020	2021p
Apples	1,199	992	1,023	979
Strawberries	142	144	130	124
Pears	58	43	39	42
Plums	61	47	47	34
Sweet cherries	44	45	37	29
Blueberries	13	15	11	15
Currants	16	11	12	13
Sour cherries	16	16	13	11
Mirabelle plums	9	5	5	5
Other	4	14	12	10
TOTAL	1,561	1,330	1,329	1,263

FRESH VEGETABLES ^{2,3}	2018	2019	2020	2021p
Carrots	625	791	802	850
Onions	410	522	540	594
White cabbage	355	449	446	490
Gherkins	200	183	149	140
Red cabbage	104	125	125	137
Asparagus	133	131	118	116
Iceberg lettuce	134	139	128	115
Beetroot	81	96	99	105
Spring onions	94	85	90	82
Other	1,119	1,187	1,196	1,138
TOTAL	3,255	3,707	3,693	3,767

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

Sources: AMI-informiert.de; Destatis; Eurostat

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	1,261	1,340	1,353	1,372
Apples	556	495	550	495
Oranges	473	464	499	464
Watermelons	510	473	513	404
Easy peelers	368	356	393	399
Table grapes	320	322	347	313
Lemons	172	189	233	201
Pears	167	157	158	162
Pineapples	163	149	127	135
Other	1,379	1,485	1,459	1,301
TOTAL	5,368	5,431	5,632	5,246

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	741	720	743	708
Cucumbers/Gherkins	496	531	589	556
Peppers	401	387	419	391
Lettuce	298	297	306	295
Carrots	252	275	252	226
Onions	240	277	246	214
Courgettes	97	98	111	101
Mushrooms	93	94	92	82
Cauliflower	77	74	81	76
Other	603	613	664	642
TOTAL	3,299	3,366	3,503	3,292

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	247	283	301	341
Apples	60	64	56	64
Table grapes	31	26	26	25
Oranges	29	23	22	21
Other	228	204	204	196
TOTAL	596	598	610	647

FRESH VEGETABLES	2018	2019	2020	2021p
Carrots	64	56	44	54
Onions	73	59	65	50
White cabbage	47	58	50	50
Lettuce	46	49	46	46
Other	233	236	213	197
TOTAL	464	458	417	397

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	6,218	6,121	7,043	6,415
Export	742	713	726	724
TRADE BALANCE	-5,476	-5,408	-6,317	-5,691

FRESH VEGETABLES	2018	2019	2020	2021p
Import	4,487	4,656	5,049	4,892
Export	392	423	404	401
TRADE BALANCE	-4,095	-4,233	-4,645	-4,491



Population
10.7 m



Area
132,000 km²



GDP per Inhabitant
15,420 EUR



GDP Growth
-9.0 per cent



Unemployment
9.6 per cent



CPI for Food
(2015=100)
101.2

GREECE

In Greece, most fruit vegetables are grown under cover. Examples of open-field crops are onions and leafy vegetables. In 2021, tomato and pepper yields decreased, but more onions were produced. Greece is a net exporter of vegetables. These play only a minor role in the country's foreign trade, since a large proportion of what is produced remains in the country. Large volumes of cucumbers and tomatoes leave the country for the fresh market. Overall, vegetable exports increased by 12 per cent in 2021. The main destinations were Bulgaria, Germany and Romania.

In Greece, fruit production is much bigger than vegetables, with a significant amount destined for foreign customers. However, in 2021 it was hit by many episodes

of bad weather. There were several frosts in January, followed by a cold spell in early April that lasted several days. These weather events had extreme consequences when it came to yields of many fruit types.

The stonefruit category was particularly affected by the frosts. According to estimates, after a decline in 2020, harvest losses also occurred in 2021. The harvest for peaches (including those for processing), nectarines and apricots was only half the normal level. In contrast, the kiwifruit crop was expected to be 275,000 tonnes, similar to the previous year. For some time, the area of kiwifruit production has continued to expand. In the end, however, an anticipated increase in volume for 2021 simply compensated for lost yield.

Citrus fruits also play a major role in Greece, both in terms of production and export. Just like in other Mediterranean countries, such as Spain, the country's citrus harvest has been smaller of late. This was true for orange and easy-peeler volumes last year. Grapes are also a major export crop, with mainly seedless varieties grown, although production has stagnated for a few years. Melons are mainly watermelons, which are produced and consumed in huge amounts. They are also the leading export item, in volume terms, and exports remain stable.

In addition, to the fruits mentioned above, Greece produces a lot of apples, some of which are exported. Due to the frosts, the volume harvested in 2021 was 28 per cent lower than in the previous year. For Greece, which exports much more fruit than it imports, the most important target markets are Romania, Germany and Bulgaria. About one-third of its fruit exports go outside the EU.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	913	849	887	851
Watermelons	630	345	431	415
Kiwifruit	265	286	307	275
Table grapes	293	273	273	271
Apples	301	276	280	203
Easy peelers	174	151	172	152
Peaches ¹	244	216	185	110
Apricots	80	80	78	55
Nectarines	116	119	105	50
Other	391	386	438	392
TOTAL	3,408	2,981	3,155	2,774

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes ¹	532	463	536	502
Onions	145	134	172	200
Peppers	146	155	164	150
Cucumbers	133	129	137	131
Spinach	87	74	67	76
Cabbage	86	70	69	70
Courgettes	76	66	64	63
Aubergines	71	55	61	57
Cauliflower/Broccoli	59	50	51	49
Other	324	250	261	242
TOTAL	1,660	1,445	1,583	1,540

¹) Excluding products grown for processing.

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

FRESH FRUIT EXPORTS 2020

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2020

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	216	216	206	210
Lemons	19	22	25	22
Apples	15	26	21	20
Pineapples	12	15	13	16
Other	41	33	35	39
TOTAL	303	312	300	307

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes ¹	30	17	14	21
Onions	11	34	18	12
Mushrooms	11	11	10	12
Other	31	43	35	35
TOTAL	83	105	77	79

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	313	265	323	337
Watermelons	184	188	205	208
Kiwifruit	135	172	167	163
Easy peelers	106	115	119	132
Apples	71	89	75	71
Strawberries	29	45	55	67
Table grapes	66	63	68	60
Peaches	95	103	94	39
Cherries	17	22	32	27
Nectarines	66	61	66	20
Apricots	24	23	22	15
Other	148	143	158	166
TOTAL	1,254	1,289	1,383	1,305

FRESH VEGETABLES	2018	2019	2020	2021p
Cucumbers	40	38	37	48
Tomatoes	38	35	36	39
Peppers	11	9	9	9
Other	51	53	51	62
TOTAL	140	135	133	158

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	211	224	219	194
Export	740	796	950	894
TRADE BALANCE	+529	+572	+731	+700

FRESH VEGETABLES	2018	2019	2020	2021p
Import	76	88	70	53
Export	102	99	102	117
TRADE BALANCE	+26	+11	+32	+64



Population
59.4 m



Area
302,100 km²



GDP per Inhabitant
27,810 EUR



GDP Growth
-8.9 per cent



Unemployment
5.1 per cent



CPI for Food
(2015=100)
103.0

ITALY

2021 was a black year for Italy's fruit and vegetable growers. Crops were hit hard by unusually poor weather, which included frosts in spring, heavy rainfall and hail, followed by heat and drought in summer. The fruit harvest was already below average in 2020, but the losses were even larger in 2021. Besides unfortunate weather caused by climate change, bacterial diseases led to losses in kiwifruit, while the spread of new insects like the brown marmorated stink bug did the same for pears. Compared with the average for the previous five years, all major fruit categories saw a decline in volume: apples (-4 per cent), pears (-68 per cent), plums (-31 per cent), kiwifruit (-28 per cent), apricots (-27 per cent), peaches (-35 per cent) and cherries (-12 per cent). Only citrus was

unaffected. As a result, prices rose in all markets, while exports failed to reach normal levels. The situation was not much better for vegetables. Throughout the year, there were losses in a wide range of crops, a trend reflected in European export markets. In future, it will be important to invest more to protect production facilities, especially when it comes to fruit. Currently, only 20 per cent of agricultural production is insured against extreme weather events.

In any case, Italy's fruit exports remain much larger than its vegetable exports. While around one-quarter of the fruit it produces leaves the country, only 12 per cent of its vegetable harvest is sent abroad. The main market is Germany, followed by France and Austria. While apples, table grapes and kiwifruit remained the top three exported fruits, there was also a positive trend for exports of blueberries, raspberries and cherries. Initial estimates show that Italy has a positive trade balance for both fruit and vegetables. Due to higher prices on international markets, its export earnings increased once more.

Last year, the pandemic only pushed up in-home spending in the short term. Overall, household purchasing was stable. Available data for 2021 show a decrease in the volume purchased compared with 2020. As in the previous 12 months, last year's smaller harvests will be reflected in higher purchase prices. In 2020, each household bought 233kg (-1 per cent) fruit and vegetables, and spent around €458 (+4 per cent). The pandemic changed eating habits in 2020, and saw more consumers buy organically produced or regional products.

For years, organic fruit and vegetable production in Italy has increased, not only to satisfy domestic demand, but also to serve the export market. Growth rates for vegetables are higher than for fruit. In 2020, the area of organic vegetable production (including mushrooms) was 68,800ha, while for fruit (including berries and exotic fruits) it was 42,800ha. In addition, organic nut production area was 53,100ha, for citrus it was 35,500ha, and for table grapes it was 2,400ha. Other organic production includes oranges (18,700ha), apples (8,300ha), kiwifruit (6,400ha), and the largest organic vegetable crop, peas, with 8,600ha.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	1,759	1,793	1,800	2,025
Apples	2,264	2,096	2,124	2,020
Melons	1,188	1,242	1,094	1,090
Table grapes	1,112	1,078	1,064	940
Easy peelers	662	669	660	830
Lemons	465	484	529	485
Peaches ²	503	534	380	335
Kiwifruit	393	318	305	300
Pears	730	363	611	200
Others	2,010	1,909	1,724	1,580
TOTAL	11,086	10,486	10,289	9,805

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Tomatoes ²	986	1,049	1,049	1,050
Courgettes	560	569	600	615
Carrots	479	492	494	515
Fennel	525	524	514	510
Lettuce	488	487	487	470
Onions	372	478	458	425
Artichokes	390	379	367	375
Cauliflower/Broccoli	368	368	365	355
Aubergines	298	301	305	325
Sweet peppers	261	250	248	255
Others	2,452	2,511	2,458	2,060
TOTAL	7,179	7,407	7,345	6,955

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	801	758	810	800
Pineapples	176	160	136	145
Oranges	177	191	243	110
Lemons	115	139	111	95
Others	725	800	750	690
TOTAL	1,994	2,048	2,050	1,840

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Lettuce	125	136	115	120
Tomatoes ²	130	141	131	115
Sweet peppers	83	98	95	85
Others	313	358	310	305
TOTAL	651	733	651	625

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	673	909	910	985
Table grapes	465	424	469	405
Kiwifruit	293	312	276	300
Watermelons	299	233	320	275
Oranges	138	109	113	125
Pears	155	106	92	125
Easy peelers	80	68	61	95
Peaches/Nectarines	160	157	78	85
Lemons	47	47	49	40
Others	280	308	252	305
TOTAL	2,590	2,673	2,620	2,740

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Lettuce	207	210	193	185
Cauliflower/Broccoli	82	73	78	95
Carrots	83	89	107	90
Kohlrabi/Kale	66	65	70	85
Tomatoes	79	66	63	65
Beetroot	58	60	58	60
Fennel	56	54	62	55
Spinach	21	23	28	35
Onions	36	33	27	35
Others	178	171	176	170
TOTAL	866	844	862	875

TRADE BALANCE

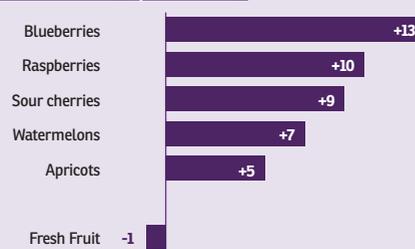
VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	1,746	1,764	1,879	1,745
Export	2,806	2,743	2,943	3,175
TRADE BALANCE	+1,060	+979	+1,064	+1,430

FRESH VEGETABLES	2018	2019	2020	2021p
Import	675	824	728	723
Export	1,318	1,361	1,396	1,492
TRADE BALANCE	+643	+537	+668	+769

TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2011-2020)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2020)





Population
17.4 m



Area
41,500 km²



GDP per Inhabitant
45,870 EUR



GDP Growth
-3.8 per cent



Unemployment
2.7 per cent



CPI for Food
(2015=100)
107.0

NETHERLANDS

Within the EU, the Netherlands is one of the smallest countries. Nevertheless, it plays an important role in global trade. The port of Rotterdam, for instance, is the largest deep-water port in Europe and one of the largest seaports in the world.

As such, the country acts as a major transshipment point for numerous products, including fruit and vegetables. These include exotic fruits from overseas like bananas, pineapples and avocados, but also fruits from the Mediterranean region like oranges and table grapes. Due to the high demand for food during the recent pandemic, demand for fruit has also increased. As a result, the Netherlands' fruit imports increased in 2020 and, according to preliminary data, this is likely to have continued in 2021. But fruit exports looked set to decline

somewhat last year. Pears are mainly exported from domestic production, along with smaller quantities of apples and strawberries. The remaining fruit exports are mainly re-exports. As fruit imports exceed exports, the trade balance for fruit is still negative.

Vegetables are generally imported in significantly smaller volumes than for fruit, because domestic production is high. Onion imports fell in 2020, but these are forecast to increase again in 2021. Onions not only rank first among vegetable imports, they are also by far the main export product. This is because production in the country is high and is expected to have grown again in 2021. Likewise, the harvest volume of carrots increased strongly, with production areas expanded in response to increased demand during the pandemic.

In addition to onions and carrots, the Netherlands is a major producer of fruit vegetables and leafy vegetables, either outdoors or under glass. However, the weather was not optimal for such items in 2021. In the spring, low temperatures and low levels of sunlight held back their progress. As a result, tomato, cucumber and pepper harvests were smaller. This also had an impact on vegetable exports, which were down on 2020. However, as those exports continue to exceed imports by a large margin, the country's trade balance for vegetables remains positive.

Inputs costs are a big source of concern right now. Energy accounts for up to 30 per cent of the running cost for a greenhouse. As that overhead increases, production under glass seems likely to decrease, because the higher costs cannot be passed on fully to buyers. In addition, trade is becoming more difficult due to shorter and therefore more expensive transport availability. To what extent this will affect the Netherlands' prime position as a trade hub remains to be seen.



PRODUCTION

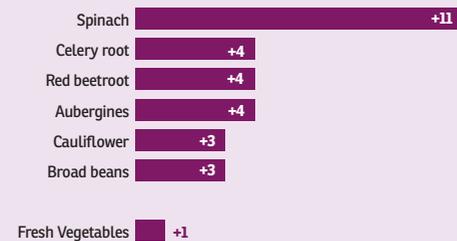
VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Pears	402	373	400	340
Apples	269	272	220	245
Strawberries	65	76	78	73
Other berries	17	17	17	15
Other	9	14	15	14
TOTAL	760	752	730	687

FRESH VEGETABLES	2018	2019	2020	2021p
Onions	1,131	1,795	1,700	1,922
Tomatoes	910	910	910	900
Carrots	539	616	574	661
Cucumbers	410	410	430	415
Peppers	355	415	430	410
Mushrooms	300	270	260	265
White cabbage	98	115	117	114
Leeks	82	92	90	95
Celeriac	79	92	93	90
Iceberg lettuce	85	86	90	86
Spinach	67	74	72	73
Aubergines	55	62	65	61
Brussel sprouts	51	54	55	51
Chicory witlof	53	53	53	50
Other	411	440	444	430
TOTAL	4,626	5,484	5,383	5,615

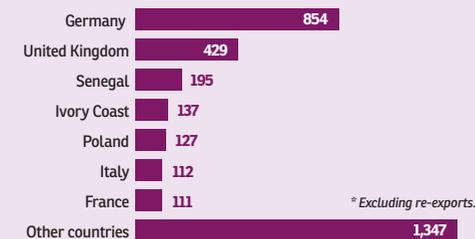
TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2011-2020)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION* ('000 tonnes, 2020)



* Excluding re-exports.

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT ²	2018	2019	2020	2021p
Bananas	1,141	1,316	1,330	1,467
Oranges	589	595	622	589
Table grapes	413	419	401	483
Avocados	345	349	414	462
Apples	305	245	282	301
Pineapples	321	324	302	291
Other	1,920	1,906	2,040	2,043
TOTAL	5,034	5,154	5,391	5,636

FRESH VEGETABLES	2018	2019	2020	2021p
Onions	248	337	239	284
Tomatoes	230	230	228	246
Peppers	96	94	105	114
Cucumbers	117	107	107	101
Other	710	728	728	833
TOTAL	1,401	1,496	1,407	1,578

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT ²	2018	2019	2020	2021p
Total ¹	4,088	4,208	4,333	4,276
Dutch origin only				
Pears	156	212	206	213
Apples	44	44	57	45
Strawberries	28	21	18	19
Other	3	4	4	4
TOTAL	231	281	285	281

FRESH VEGETABLES	2018	2019	2020	2021p
Total ¹	4,927	5,027	5,043	4,886
Dutch origin only				
Onions	1,059	967	1,282	1,219
Tomatoes	750	738	730	660
Cucumbers	252	317	311	315
Peppers	295	314	329	276
Cabbage	95	94	89	86
Carrots	70	62	48	55
Other	226	237	238	238
TOTAL	2,747	2,729	3,027	2,849

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT ²	2018	2019	2020	2021p
Import	5,866	6,381	6,991	7,066
Export ¹	5,859	6,080	6,898	6,899
TRADE BALANCE	-7	-301	-93	-167

FRESH VEGETABLES	2018	2019	2020	2021p
Import	1,575	1,699	1,694	1,867
Export ¹	5,301	5,663	5,609	5,607
TRADE BALANCE	+3,726	+3,964	+3,915	+3,740

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



Population
37.9 m



Area
312,700 km²



GDP per Inhabitant
13,650 EUR



GDP Growth
-2.5 per cent



Unemployment
1.9 per cent



CPI for Food
(2015=100)
108.6

POLAND

Poland is one of the largest fruit and vegetable producers in Europe. Despite unfavourable weather conditions and a decline in planted area, the country produced 4.6m tonnes of fruit last year. That was 5 per cent more on the year, although 2020 did see a below-average-size apple harvest. Crucially, a spring frost didn't lead to major losses, although there were shortfalls for strawberries and raspberries due to summer rain. Poland is now a significant supplier of organic soft fruit in the EU, in part because it still enjoys lower labour costs compared with other member countries.

For vegetables, Poland produced around 5m tonnes in 2021, around 4 per cent less than it did in 2020. As for fruit, weather conditions for outdoor vegetable produc-

tion were unfavourable almost throughout the growing season. Cold temperatures in spring meant sowing was delayed, while frequent summer rainfall affected the quality and post-harvest condition of open-field crops like root vegetables and onions. Due to high humidity, harvesting was more of a challenge as the threat of fungal disease increased. Once again, production of pumpkins continued to follow a recent growth trend.

Polish agricultural exports have risen steadily in recent years. Mushroom exports have seen an increase lately, while in the fruit sector the increases in apples and blueberries have been strong. Greater interest among domestic consumers, as well as emerging export demand, has meant dynamic growth for blueberry production. In fact, Poland was able to expand its exports of fresh strawberries and blueberries exports to the UK as well as neighbouring countries.

Some of Poland's fruit and vegetable crop goes into making other products. The country is a big supplier of apples to Europe's juice industry, as well as cabbage for processing and berries for freezing. In the last few years, that last trade has come under pressure from increased supply out of other countries like Ukraine.

Poland's domestic fruit and vegetable consumption continues to grow. In 2020, the pandemic pushed household vegetable purchases up by 6 per cent to 92kg per household, while fruit sales stagnated at 102kg, down 1 per cent. The three most-purchased fruits are apples, followed by bananas and oranges, while the leading three vegetables are tomatoes, onions and carrots.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2018	2019	2020	2021p
Apples	4,810	2,910	3,410	4,300
Strawberries	196	177	170	175
Sour cherries	201	152	157	165
Currants	165	126	135	150
Plums	121	95	96	110
Raspberries	116	76	116	105
Pears	70	70	65	70
Sweet cherries	60	44	44	55
Blueberries	25	35	38	40
Other	99	85	73	70
TOTAL	5,862	3,770	4,304	5,240

FRESH VEGETABLES ²	2018	2019	2020	2021p
Tomatoes	929	918	856	835
Cabbage	913	837	710	690
Carrots	726	678	671	635
Onions	563	535	660	615
Cucumbers	539	520	471	420
Mushrooms	330	335	340	345
Beetroot	298	281	261	240
Cauliflower	220	207	150	140
Other	1,083	1,043	1,124	1,100
TOTAL	5,601	5,354	5,243	5,020

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	487	459	564	515
Oranges	153	172	156	205
Easy peelers	147	168	161	195
Watermelons	153	152	161	185
Lemons	120	123	136	130
Other	502	548	537	540
TOTAL	1,562	1,622	1,715	1,770

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	155	161	175	165
Onions	63	205	151	135
Cucumbers	61	65	63	75
Peppers	70	74	72	65
Other	265	322	318	330
TOTAL	614	827	779	770

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	782	974	647	930
Pears	45	73	99	120
Bananas	78	66	85	70
Easy peelers	27	20	20	35
Strawberries	6	6	15	20
Blueberries	12	14	18	20
Cider apples	13	17	13	15
Other ⁴	99	113	98	105
TOTAL	1,062	1,283	995	1,315

FRESH VEGETABLES	2018	2019	2020	2021p
Mushrooms	236	212	202	225
Onions	149	126	144	130
Tomatoes	92	75	72	60
Cabbage	41	29	31	35
Carrots	25	23	22	25
Peppers	24	29	28	25
Cauliflower/Broccoli	20	21	24	25
Other	179	184	166	195
TOTAL	766	699	689	720

TRADE BALANCE

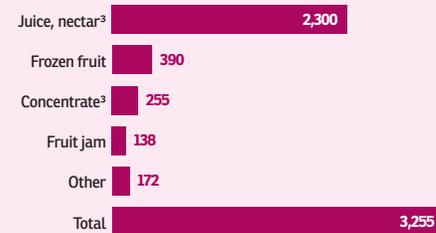
VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	1,293	1,373	1,521	1,581
Export	581	622	647	700
TRADE BALANCE	-712	-751	-874	-881

FRESH VEGETABLES	2018	2019	2020	2021p
Import	630	760	788	856
Export	693	755	708	750
TRADE BALANCE	+63	-5	-80	-106

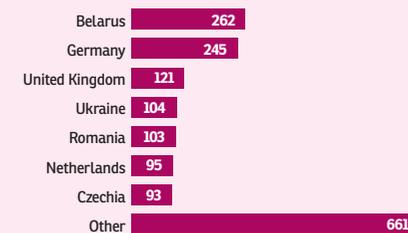
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2020/21)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2020)





Population
10.3 m



Area
92,200 km²



GDP per Inhabitant
19,430 EUR



GDP Growth
-8.4 per cent



Unemployment
4.5 per cent



CPI for Food
(2015=100)
103.6

PORTUGAL

Portugal is often overshadowed by its larger Iberian neighbour, but its own fresh produce output is considerable. In fact, it ranks seventh in the EU for both fruit and vegetables. Yes, tomatoes for processing account for more than half of the country's 2.3m-tonne vegetable harvest, but that is not considered here. Oranges, apples and pears are the main fruit crops, while melons are far behind in fourth place. Tomatoes for the fresh market, brassicas, carrots and pumpkins are the most prominent vegetable crops.

After fruit production fell in 2020, a larger crop was anticipated last year. This holds especially true for apples, pears and stonefruit. While the weather was warmer than usual in spring, lower temperatures in

summer favoured growth in many crops. Autumn was again warmer than usual, and especially in the southern parts of the country drought started to emerge as a problem.

In the case of pears, Portugal was one of the few countries in Europe to have an abundance of stock last autumn. So the outlook for exports of Portugal's unique flagship variety Rocha looked very favourable as it headed into 2022. Grown only in Portugal, sales of Rocha to other countries has increased – driven by buyers in Brazil and the UK, but with other EU countries like France, Spain and Germany catching up. Citrus is also exported, especially oranges, and kiwifruit is also an important export item. But the biggest growth in the past decade has been in soft fruit production and exports. This involves raspberries and blueberries in particular, whose exports have more than doubled since 2016. Investment from abroad has been an important factor in boosting export-oriented production.

The main destination for Portuguese fresh produce exports is Spain, followed by France. Around 16 per cent of its fruit exports leave the EU, with the UK and Brazil taking the lion's share of that volume. But despite export growth, Portugal's trade balance in fresh fruit remains negative. It imports a lot from Latin America, including bananas and pineapples, as well as oranges and melons mainly from Spain.

Preliminary figures for 2021 indicate good vegetable yields. Portugal's vegetable production is characterised by some special features. Besides tomatoes for the fresh market, cabbages play a special role. Common is the couve caldo verde, which is eaten only in Portugal itself. Exported volumes of savoy and pointed varieties, on the other hand, have increased. Early carrots from the Alentejo region are another important export item. And pumpkins play a prominent role; they are widely used in soups and even imported. In no other European country do pumpkins reach fourth place in the vegetable production table.

The main export destinations for Portuguese vegetables are Spain and France, and less than 5 per cent go to non-EU countries. As for fruit, Portugal's trade balance in fresh vegetables is negative.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	341	347	355	350
Apples ¹	264	371	287	341
Pears	161	198	131	183
Melons	57	40	62	60
Kiwifruit	34	44	46	50
Peaches	43	45	35	40
Easy peelers	40	42	42	40
Raspberries	24	27	27	28
Watermelons	26	23	28	25
Blueberries	11	15	15	16
Other	116	129	131	127
TOTAL	1,117	1,281	1,159	1,260

FRESH VEGETABLES ²	2018	2019	2020	2021p
Tomatoes ¹	104	91	144	140
Carrots	92	86	134	130
Cabbage	79	81	116	110
Pumpkins	73	65	121	100
Onions	54	62	71	65
Lettuce	45	51	62	65
Peppers	38	37	54	54
Savoy cabbage	34	35	51	50
Broccoli	37	38	46	50
Other	243	248	302	336
TOTAL	799	794	1,101	1,100

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

Sources: AMI-informiert.de; INE

FRESH FRUIT EXPORTS 2020

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2020^{1,2}

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	189	202	236	230
Oranges	138	108	149	150
Pineapples	66	77	57	60
Melons	60	57	55	55
Apples	55	50	47	50
Watermelons	47	47	43	45
Other	314	300	316	310
TOTAL	869	841	903	900

FRESH VEGETABLES ²	2018	2019	2020	2021p
Onions	70	68	76	70
Tomatoes ¹	51	50	45	50
Cauliflower	32	29	32	30
Carrots	32	29	25	25
Peppers	19	19	18	20
Pumpkins	11	9	14	10
Other	74	74	72	75
TOTAL	289	278	282	280

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	187	111	155	140
Pears	95	103	95	110
Apples	64	72	68	70
Raspberries	23	26	26	27
Lemons	18	19	28	25
Kiwi	19	18	16	20
Other	96	160	148	128
TOTAL	502	509	536	520

FRESH VEGETABLES ²	2018	2019	2020	2021p
Pumpkins	37	34	35	35
Other cabbage	23	29	32	35
Carrots	18	31	31	30
Courgettes	16	16	8	15
Tomatoes ¹	6	10	7	10
Leeks	4	6	5	6
Onions	5	7	6	6
Other vegetables	49	35	32	33
TOTAL	158	168	156	170

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	685	657	770	790
Export	584	609	685	695
TRADE BALANCE	-101	-48	-85	-95

FRESH VEGETABLES ²	2018	2019	2020	2021p
Import	183	201	203	210
Export	175	181	171	180
TRADE BALANCE	-8	-20	-32	-30



Population
21.7 m



Area
819,900 km²



GDP per Inhabitant
47,410 EUR



GDP Growth
-2.6 per cent



Unemployment
5.1 per cent



CPI for Food
(2015=100)
104.8

SCANDINAVIA

DENMARK, FINLAND, SWEDEN

Due to their climate, Denmark, Finland and Sweden can only produce some of the fruit and vegetables they need. No surprise then that imports account for about 40 per cent of the markets' vegetable supply. As for fruit, imports account for 02 per cent of the market. Accordingly, the trade balance is negative for both vegetables and fruit. For the latter, the three Nordic countries have a trade deficit of €1.52bn. For vegetables, it is €1.0bn. In total, the trio imported around 1.38m tonnes of fresh fruit and 652,000 tonnes of fresh vegetables last year, which means imports were once again lower than in the previous year. That came on the back of a decrease in 2020. Rising transport costs and a temporary lack of sales opportunities in the hospitality sector were probably the main reasons for the decline in imports.

There were differences in the three markets. After a decline in the previous year, Denmark imported more fruit and vegetables last year. For Sweden and Finland, on the other hand, imports fell. Fruit and vegetable exports also fell for the second time in a row in 2021. The decline in vegetables was minimal and is mainly due to smaller exports of carrots from Denmark. The decline in fruit exports was entirely due to Denmark, with fewer apples being exported in particular.

When it came to fruit production, the high level seen in 2020 was not maintained in 2021. Only Finland harvested a slightly larger volume. The biggest decline was in Denmark, where the apple and pear harvests were again significantly smaller than in the previous year. Besides those two, strawberries make up a large part of the fruit harvest in the three Nordic countries, with most production in greenhouses. More strawberries were harvested in Finland, but production in Denmark and Sweden did not match the previous year's figures. Overall, the vegetable harvest grew even more than it did in 2020. Carrots in particular were harvested in larger volumes across all three nations. Good water supply during the growing season helped boost yields. For onions, however, weather conditions were not optimal. Production was delayed, so overall yields could not reach the previous year's level. For greenhouse tomato production, sufficient sunshine hours were lacking during the summer months, which meant the harvested volumes remained below those of the previous year.

Similar to other countries, growth in Coronavirus case numbers across the Nordic region flattened during the summer of 2021. This allowed restaurants to reopen and social life to return to normal. However, by the end of the year, a new wave arrived and many restrictions were reintroduced. So the pandemic was again a dominant issue for consumers in Nordic countries in 2021. Demand from the catering industry has not yet returned to the levels seen before the crisis. For producers and traders, rising costs in particular are a major issue. Rising freight costs are making imports more expensive. And the costs of production, energy and labour are also rising.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Denmark	52	43	58	47
- Apples	33	25	32	24
- Strawberries ²	7	6	6	6
- Pears	6	5	7	6
Finland	26	30	26	26
- Strawberries ²	16	18	15	16
- Apples	7	8	7	7
Sweden	49	41	49	48
- Apples	31	22	29	30
- Strawberries ²	16	16	17	16
TOTAL	126	114	133	122

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Denmark	307	300	303	321
- Carrots	103	105	94	108
- Onions	43	61	70	67
- White cabbage	26	24	26	27
Finland	267	294	297	296
- Carrots	67	77	81	85
- Tomatoes	39	40	41	38
Sweden	308	346	395	386
- Carrots	93	107	118	120
- Onions	45	50	65	55
TOTAL	882	941	995	1,003

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

FRUIT AND VEGETABLE IMPORTS 2020

BY NORDIC COUNTRIES* ('000 tonnes)



TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH* (% p.a. 2011-2020)



Fresh Fruit and Vegetables +1
* Denmark, Finland, Sweden.

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Denmark	432	421	389	430
- Bananas	96	89	76	90
- Apples	53	51	53	71
- Oranges	58	55	47	49
Finland	331	333	329	300
- Bananas	112	110	110	100
- Apples	41	42	42	35
Sweden	653	666	679	652
- Bananas	194	191	188	186
- Oranges	73	75	76	77
TOTAL	1,416	1,419	1,397	1,382

FRESH VEGETABLES	2018	2019	2020	2021p
Denmark	211	217	199	209
- Tomatoes	38	38	37	37
- Lettuce	25	25	24	26
- Cucumbers	25	24	22	24
Finland	137	132	117	108
- Tomatoes	26	27	26	23
- Lettuce	26	26	23	22
Sweden	347	357	348	335
- Tomatoes	86	86	88	83
- Cucumbers	34	38	38	35
TOTAL	695	706	664	652

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Denmark	45	47	42	39
- Apples	7	7	8	7
- Bananas	8	11	2	3
Finland	8	6	6	7
Sweden	57	54	43	45
TOTAL	110	106	91	91

FRESH VEGETABLES	2018	2019	2020	2021p
Denmark	58	53	51	51
- Carrots	30	26	30	28
- Onions	9	7	4	6
Finland	1	2	2	1
Sweden	18	19	18	18
TOTAL	77	74	71	71

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	1,662	1,604	1,706	1,644
Export	130	132	123	120
TRADE BALANCE	-1,532	-1,472	-1,583	-1,524

FRESH VEGETABLES	2018	2019	2020	2021p
Import	1,058	1,097	1,108	1,137
Export	131	136	131	137
TRADE BALANCE	-927	-961	-977	-1,000



Population
47.4 m



Area
506,000 km²



GDP per Inhabitant
23,690 EUR



GDP Growth
-10.8 per cent



Unemployment
9.9 per cent



CPI for Food
(2015=100)
103.9

SPAIN

There were some new developments for Spain's fruit and vegetable industry in 2021. While vegetable production reached a record 10.5m tonnes, the country's fresh fruit harvest was almost 4 per cent lower than it was the previous year. Stonefruit crops suffered at the hands of a late frost in the second half of March, while lemon production could not match the heights seen in 2020. In contrast, conditions were favourable for melons and watermelons.

Tropical fruits are gaining importance in the south of Spain, where mangoes and avocados are now established crops. With a steady expansion of planted area, and favourable weather conditions, avocado production was set for a 20 per cent increase to 70,000 tonnes this

past season. Last year's mango harvest, on the other hand, was again below expectations due to changeable weather and a lack of water. As in 2020, an estimated potential yield of 60,000 tonnes failed to materialise. Elsewhere, relatively new production of pitahayas amounts to just 20ha, but is expanding. However, the fruit costs a lot to grow.

For the main vegetable crops, trends seen in the past few years continue. These include a reduction in tomato plantings, and an increase for peppers. Onion and lettuce production also increased significantly last year, and this contributed to an overall upward trend for vegetable production area and volume.

According to preliminary data, both fruit and vegetable exports were around the same level in 2021 as they were in the previous year. For individual products, however, the export business was limited by weaker demand from foodservice customers throughout Europe, due to the Covid crisis. In addition, demand from households in Spain was lower. After fruit purchases rose by 10 per cent in 2020 and vegetable sales were up 13 per cent, those two metrics fell by 8 per cent in the first half of last year. Especially at times of abundant supply, limited demand contributed to a sharp fall in prices. This was true for example in April with an oversupply of courgettes, which were left unsold even at extremely low prices. The country's large onion crop was also difficult to sell in 2021, due to weak export demand. At times when all marketing channels are open, oversupply does not have such a big impact.

As far as exports to the UK are concerned, so far there has been no drastic downturn in volumes because of Brexit. There was a big decline in tomato exports from January to September 2021, but this was only the continuation of a trend seen in previous years. In contrast, deliveries of important products such as broccoli, lettuce, peppers and watermelons increased compared with the previous year. Shipments of onions and oranges remained stable. However, exporters report that the organisational effort required to export to the UK has already increased. For Spain's export business in general, higher costs in logistics are a real concern.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	3,930	3,343	3,493	3,503
Easy peelers	2,385	1,832	2,346	2,100
Watermelons	1,092	1,211	1,235	1,319
Lemons	1,149	931	1,142	1,020
Melons	664	642	611	650
Apples ¹	484	571	446	507
Peaches ¹	623	666	534	490
Strawberries	345	352	273	361
Nectarines	547	573	484	320
Table grapes	273	332	298	307
Other	2,366	2,497	2,618	2,423
TOTAL	13,858	12,950	13,480	13,000

FRESH VEGETABLES ²	2018	2019	2020	2021p
Tomatoes ¹	2,070	2,008	1,821	1,703
Onions	1,431	1,600	1,132	1,567
Peppers ¹	1,155	1,312	1,393	1,430
Lettuce	935	1,009	962	1,157
Cucumbers	644	739	795	753
Courgettes	596	602	631	633
Broccoli	543	532	591	600
Carrots	382	386	393	417
Garlic	274	275	269	309
Other	1,838	1,928	2,164	1,931
TOTAL	9,868	10,391	10,151	10,500

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

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	365	361	324	360
Avocados	129	136	174	208
Apples	167	195	180	198
Oranges	175	149	191	160
Other	1,012	942	980	1,014
TOTAL	1,848	1,783	1,849	1,940

FRESH VEGETABLES ²	2018	2019	2020	2021p
Beans	144	120	131	128
Tomatoes ¹	110	130	132	120
Onions	87	82	89	98
Other	253	274	263	273
TOTAL	594	606	615	619

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	1,528	1,757	1,639	1,595
Easy peelers	1,369	1,372	1,344	1,320
Watermelons	862	910	840	900
Lemons	600	734	734	725
Melons	405	456	434	415
Nectarines	357	429	329	328
Peaches	382	400	325	322
Strawberries	279	293	287	310
Persimmons	168	210	211	190
Other	1,189	1,263	1,284	1,325
TOTAL	7,139	7,824	7,427	7,430

FRESH VEGETABLES ²	2018	2019	2020	2021p
Peppers	746	829	845	850
Lettuce	795	760	766	770
Cucumbers	649	704	703	702
Tomatoes	813	767	729	670
Brassicas	486	484	494	535
Courgettes	362	415	426	445
Onions	353	405	356	321
Aubergines	155	159	189	199
Garlic	152	184	189	170
Other	580	638	681	710
TOTAL	5,091	5,345	5,378	5,372

TOP 5 FRESH VEGETABLE PRODUCTION

VOLUME GROWTH ('000 tonnes p.a. 2011-2020)



FRUIT AND VEGETABLE EXPORTS 2020

BY DESTINATION ('000 tonnes)



TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	1,951	2,009	2,222	2,360
Export	7,543	7,790	8,572	8,950
TRADE BALANCE	+5,592	+5,781	+6,350	+6,590

FRESH VEGETABLES ²	2018	2019	2020	2021p
Import	597	633	621	635
Export	5,161	5,600	5,922	6,250
TRADE BALANCE	+4,564	+4,967	+5,301	+5,615



Population
39.9 m



Area
498,000 km²



GDP per Inhabitant¹⁾
11,600 EUR



GDP Growth
-5.3 per cent



Unemployment¹⁾
3.3 per cent



CPI for Food
(2015=100)
108.3

SOUTHEAST EUROPE

BULGARIA, CROATIA, HUNGARY, ROMANIA

The EU's four south-eastern member states have a combined population of just under 40m, and Romania accounts for almost half of that figure. Although each country has great potential to grow fruit and vegetables, all of them are net importers when it comes to the fresh market, with trade deficits of around €180m-190m in Bulgaria, Croatia and Hungary. In Romania, it is even higher.

Bananas are the biggest fruit import in each nation. A lot of these enter via ripening companies in western Europe, which means their real Latin American origin is

not documented. Citrus is the next largest. Croatia, the only one of the quartet with its own production, does have a noteworthy volume of mandarins, which are also exported. Vegetable imports are less important in all cases. Here, fruit vegetables like tomatoes, cucumbers and peppers are the biggest, with Greece and Turkey the leading suppliers for fresh fruit and vegetables. Germany follows far behind, and most of its volume is re-exported.

For the four countries, fresh produce exports remain of limited importance. Hungary has the largest export volume, but its overall fruit and vegetable exports are dominated by processed products. Germany is the leading destination for the fresh produce that is sold abroad. There is also some trade between the four.

Production of apples, Hungary's biggest fruit crop, once reached 800,000 tonnes in a good year. But the 2019 harvest amounted to just half that number, while in 2020 it was a mere 358,000 tonnes. The 2021/22 season saw production rebound to around 500,000 tonnes, but this is still below average. Late April frosts caused some problems, but their true impact was only fully appreciated later. Summer started with extreme heatwaves and drought, which meant fruit sizes were smaller.

For sour cherries, the situation was similar to that for apples, but without a rebound in 2021. A record crop of more than 90,000 tonnes in 2018 was followed by smaller harvests around 65,000 tonnes in 2019 and 2020. Last season's cold spring, especially during the flowering period, and extreme heatwaves caused serious problems.

Hungary's vegetable production area is also in decline, with 80,000-90,000ha currently in use. Sweetcorn (38,000ha) is the largest crop, but this goes mainly for processing. The most important fresh fruit export is watermelons; and the biggest vegetable export is peppers, mainly a white conical variety called feher.

Very high volume figures for Romania must be interpreted with some caution, since production belonging to small subsistence farmers is probably also included in these estimates. Bulgaria used to export some organic cucumbers to western Europe, but in recent years this trade flow has slowed to just a few hundred tonnes.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bulgaria	357	361	312	330
- Plums	56	56	60	60
- Cherries	60	60	57	60
Croatia	212	177	167	180
- Apples	90	68	63	70
- Easy peelers	47	52	40	45
Hungary	925	733	575	702
- Apples	724	403	358	470
- Sour cherries	93	64	68	52
Romania	2,325	1,930	2,023	2,000
- Plums	830	692	757	700
- Apples	634	492	537	570
- Watermelons	521	462	449	450

FRESH VEGETABLES	2018	2019	2020	2021p
Bulgaria	453	431	343	400
- Tomatoes	118	115	89	100
- Peppers	52	64	51	55
Croatia	156	144	187	170
- Cabbage	37	32	34	35
- Tomatoes	23	22	33	30
Hungary	1640	1717	1701	1656
- Sweetcorn ¹⁾	505	489	491	482
- Peppers	190	172	154	154
- Tomatoes ²⁾	133	139	135	124
Romania	2,031	1,865	1,806	1,800
- Cabbage	691	616	600	600
- Tomatoes	464	437	450	450
- Onions	212	203	188	200

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

Sources: AMI-informiert.de; Eurostat; Croatian Bureau of Statistics; FruitVeb Hungary; WAPA

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bulgaria	329	351	350	360
- Bananas	57	69	71	75
Croatia	196	214	208	215
- Bananas	66	78	78	80
Hungary	209	279	287	290
- Bananas	66	71	80	80
Romania	780	804	815	820
- Bananas	217	211	222	220
- Apples	85	99	95	90

FRESH VEGETABLES	2018	2019	2020	2021p
Bulgaria	239	229	226	230
- Tomatoes	88	84	86	85
- Peppers	29	26	26	27
Croatia	95	116	105	110
- Pepper	13	17	18	20
Hungary	125	135	155	170
- Cucumbers	13	19	26	30
Romania	378	363	355	360
- Tomatoes	86	80	89	85
- Onions	77	80	57	70

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bulgaria	59	52	50	55
- Lemons	16	10	10	10
Croatia	74	79	71	75
- Easy peelers	32	22	25	25
Hungary	148	132	108	90
- Watermelons	60	40	32	25
Romania	14	14	26	25

FRESH VEGETABLES	2018	2019	2020	2021p
Bulgaria	52	42	45	45
Croatia	15	18	24	20
Hungary	82	77	84	80
- Peppers	23	21	19	18
Romania	23	30	48	45
- Cucumbers	7	13	18	18

TRADE BALANCE

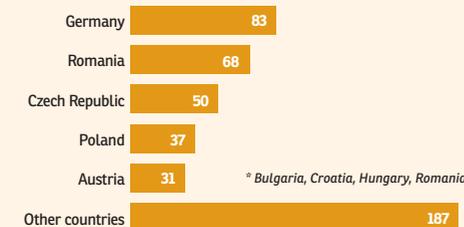
FRESH FRUITS AND VEGETABLES, VALUE (million euros)

BULGARIA	2018	2019	2020	2021p
Import	241	262	282	295
Export	108	107	104	105
TRADE BALANCE	-133	-155	-178	-190

ROMANIA	2018	2019	2020	2021p
Import	851	909	938	950
Export	63	70	94	95
TRADE BALANCE	-788	-839	-844	-855

FRUIT AND VEGETABLE EXPORTS 2020

BY SOUTHEAST COUNTRIES* ('000 TONNES)



FRUIT AND VEGETABLE IMPORTS 2020

BY SOUTHEAST COUNTRIES* ('000 TONNES)





Population
6.9 m



Area
88,400 km²



GDP per Inhabitant
6,780 EUR



GDP Growth
-0.9 per cent



Unemployment
5.4 per cent



CPI for Food
(2015=100)
110.7

SOUTHEAST EUROPE **SERBIA**

Serbian growers had to cope with changeable weather conditions in 2021 – from frosts and stormy days in the spring to droughts in the summer. The climate affected many fruit and vegetable crop yields. Stonefruit was hit hardest by the spring frosts. Production of raspberries, one of the country's most important frozen fruit exports, was halved by the weather last year. In fact, Serbia saw its lowest ever yields and highest ever prices for raspberries, but the latter is unlikely to fully compensate for lost volume. As in other European countries, Serbia's production costs are rising.

Apples are an important export product. They count for one-third of Serbia's fruit production and remain focused on the Russian market. However, as Russia's

new apple orchards start to bear more fruit, growers in Serbia might consider exports to Middle Eastern and African markets. Plum cultivation has a long tradition, not least because it is a key ingredient in the popular spirit slivovitz. For some years, plums exports have been increasing. Serbia's raspberries, meanwhile, face greater competition from Ukraine, so production of alternative berries is emerging. Blueberry plantations in the country have seen explosive growth – current acreage is 2,500ha and still growing. In 2021, blueberry production was estimated at 6,000 tonnes, with most exported to markets in Europe. But they were also sold in Malaysia, Singapore, Hong Kong, and Saudi Arabia. Further development on export markets is expected.

Serbia produces vegetables mainly for its domestic market. As with fruit, crops were affected by the poor weather last year. This explains why the overall crop was only 590,000 tonnes, the smallest in recent years. Early estimates suggest exports increased to 100,000 tonnes, while the volume of frozen vegetables exported remained the same.

One major trend in Serbia is its strong growth in organic production. At present, there are 24,000ha used for organic production, up from 15,000ha in 2015. One-third of organic food production is fruit, including grapes. This emerging supply is export-oriented, with around 90 per cent sold to EU countries. As with conventional fruit, the main organic fruit exports are raspberries, cherries, apples and blueberries, as well as low-grade processed fruits and berries. In Serbia, organic food consumption is significantly lower than in other European countries.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	460	500	489	513
Plums	430	559	583	413
Sour cherries	128	97	166	155
Melons	199	163	141	140
Raspberries	127	120	119	100
Pears	54	55	67	60
Peaches	50	48	41	30
Blackberries	35	32	29	30
Apricots	25	41	30	15
Other	107	100	151	120
TOTAL	1,615	1,715	1,816	1,575

FRESH VEGETABLES	2018	2019	2020	2021p
Brassicas	209	178	179	180
Peppers	135	118	107	100
Tomatoes	132	112	103	100
Carrots	22	40	53	45
Legumes	40	35	37	35
Cucumbers	43	30	31	30
Onions	28	30	33	30
Other	53	65	70	70
TOTAL	662	608	613	590

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	76	78	96	100
Oranges	42	41	45	45
Easy peelers	29	29	33	40
Apples	36	33	27	25
Other	82	82	106	105
TOTAL	264	263	307	315

FRESH VEGETABLES	2018	2019	2020	2021p
Tomatoes	32	32	33	40
Onions	14	20	13	10
Brassicas	9	9	9	10
Other	22	29	37	35
TOTAL	77	89	87	95

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Apples	145	217	173	170
Plums	19	20	28	25
Peaches, Nectarines	24	22	24	20
Cherries	16	18	18	15
Strawberries	10	9	9	10
Other	29	35	22	25
TOTAL	243	321	274	265

FRESH VEGETABLES	2018	2019	2020	2021p
Cucumbers/Gherkins	17	20	21	25
Onions	20	22	17	17
Peppers	14	14	14	12
Tomatoes	11	9	5	7
Brassicas	7	5	4	3
Other	30	32	29	36
TOTAL	99	101	90	100

FROZEN PRODUCTS	2018	2019	2020	2021p
Vegetables	59	53	40	37
Raspberries	103	114	108	85
Blackberries	31	34	38	38
Sour cherries	28	30	27	27
Other fruit	40	46	55	50

TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2018	2019	2020	2021p
Import	183	194	243	275
Export	216	229	260	285
TRADE BALANCE	+33	+35	+17	+10

FRESH VEGETABLES	2018	2019	2020	2021p
Import	44	70	77	90
Export	47	53	49	58
TRADE BALANCE	+3	-17	-28	-32

FRESH FRUIT EXPORTS 2020

BY DESTINATION ('000 tonnes)



FROZEN FRUIT EXPORTS 2020

BY DESTINATION ('000 tonnes)





Population
67.2 m



Area
243,600 km²



GDP per Inhabitant
40,390 EUR



GDP Growth
-9.8 per cent



Unemployment
4.3 per cent



CPI for Food
(2015=100)
108.9

UNITED KINGDOM

The British can put a turbulent 2021 behind them. Not only did Covid-19 continue to shape people's lives, but also the effects of Brexit were felt by everyone. The question remains: do the effects of the country's departure from the EU outweigh the pandemic's impact, or vice-versa? Even the world's leading economists cannot fully separate the two. For fruit and vegetable producers, both factors were major influences in 2021, alongside of course that perennial factor the weather.

Conditions in the UK hardly differed from those seen across continental Europe last year. In the winter months, from October to February, rainfall was well above average. February and March were cold, so the

planting and growth of fruit and outdoor vegetable crops were delayed. Unlike in 2020, warmer weather did not arrive until June. What's more, those summer months were also wetter and, above all, lacked sunlight. This meant that root vegetables and cabbage developed well and produced high yields in many areas. Heat-loving products, on the other hand, did not achieve maximum yields.

With all that volume available, however, there was a bigger problem: how to harvest the produce. A lack of workers proved a limiting factor for almost the entire season. This led to large losses in the fields, because crops could not be harvested on time. Much of the seasonal labour force, it turns out, had migrated to other sectors or found employment in other European countries.

With the uncertainty set to continue, some growers plan to cut their acreage in 2022. That is especially true where crops must be picked by hand. The government is under pressure to introduce regulations that will attract workers. If it does not succeed, the UK's dependence on imports will increase. The labour procurement challenge is certainly not new and does not affect the UK alone, but it is also one that has been exacerbated by Brexit.

For fruit and vegetables, the focus of the UK's trade with the EU is on imports. According to preliminary Eurostat data, exports of major fruit and vegetable products from the EU to the UK decreased by only 2 per cent year-on-year up to the end of September 2021. As part of the Brexit agreement, no tariffs or quotas on trade were set, only non-tariff barriers. But the last hurdle has not yet been cleared: soon, phytosanitary controls and certificates will be required of EU exports that arrive in the UK. The introduction of such measures has been delayed to July 2022.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2018	2019	2020	2021p
Apples	219	205	196	191
Strawberries	141	144	123	120
Pears	23	20	17	15
Raspberries	16	17	15	14
Blackcurrants	15	14	16	13
Plums	9	7	8	7
Cherries	4	6	6	5
Other soft fruit	10	11	12	11
Other	6	5	5	5
TOTAL	443	429	398	381

FRESH VEGETABLES ²	2018	2019	2020	2021p
Carrots	772	821	784	820
Onions	332	454	451	458
Cabbage	178	155	167	160
Peas ³	119	161	171	160
Cauliflower	88	90	101	98
Mushrooms	99	101	93	95
Lettuce	92	99	95	94
Turnips/Swedes	78	84	95	92
Broccoli	58	64	84	80
Parsnips	81	80	72	75
Other	514	512	541	539
TOTAL	2,411	2,621	2,654	2,671

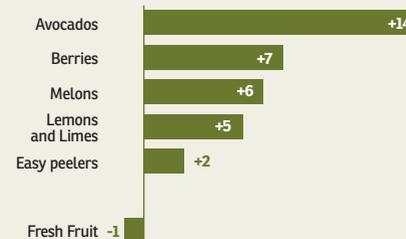
1) Including products grown for processing. 2) Excluding potatoes.

3) Including products grown for processing.

Sources: AMI-informiert.de; Defra; Eurostat

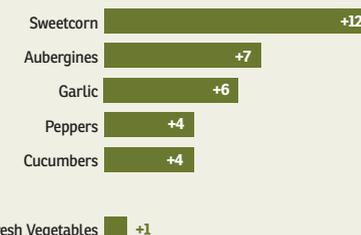
TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2011-2020)



TOP 5 FRESH VEGETABLE IMPORTS

VOLUME GROWTH (% p.a. 2011-2020)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Bananas	1,074	1,080	1,033	1,030
Apples	372	338	337	338
Melons	319	323	314	318
Easy peelers	288	292	314	310
Table grapes	274	283	276	280
Oranges	271	266	265	255
Lemons/Limes	160	162	166	160
Pineapples	160	161	135	140
Pears	120	115	106	102
Other	623	637	601	607
TOTAL	3,661	3,657	3,547	3,540

FRESH VEGETABLES ¹	2018	2019	2020	2021p
Tomatoes	411	409	380	355
Onions	400	477	298	300
Lettuce	216	217	228	215
Peppers	194	205	219	208
Cucumbers	169	189	194	195
Cauliflower/Broccoli	138	136	127	140
Mushrooms	130	132	114	135
Celery	54	53	59	65
Other	556	538	561	547
TOTAL	2,268	2,356	2,180	2,160

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2018	2019	2020	2021p
Oranges	29	33	33	30
Bananas	29	27	25	22
Apples	22	19	21	19
Other	76	83	97	89
TOTAL	156	162	176	160

FRESH VEGETABLES	2018	2019	2020	2021p
Carrots/Turnips	29	31	15	14
Mushrooms	4	5	12	12
Cauliflower/Broccoli	7	8	10	8
Other	105	99	70	74
TOTAL	145	143	107	108

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2018	2019	2020	2021p
Import	4,475	4,610	4,644	4,647
Export	184	184	218	205
TRADE BALANCE	-4,291	-4,426	-4,426	-4,442

FRESH VEGETABLES	2018	2019	2020	2021p
Import	2,917	3,045	2,978	3,040
Export	153	152	131	135
TRADE BALANCE	-2,764	-2,893	-2,847	-2,905



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