FRUIT LOGISTICA

FRUIT LOGISTICA 2024

FRUITLOGISTICA.COM

EUROPEAN STATISTICS HANDBOOK

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

In cooperation with:

FRUITNET

EUROPEAN STATISTICS HANDBOOK

Contents

Another difficult year

As in 2022, the European fruit and vegetable sector started 2023 with the hope that everything would be a little calmer. But once again, this wish was not fulfilled. A new conflict flared up in Israel. The war in Ukraine has still not been resolved. The uncertain situation continues to have an impact on consumer sentiment. However, the development of demand was not the biggest challenge. These lurk in the continuing high production costs. Except fertilisers, prices for other inputs are rising. And while we're on the subject: The EU Commission's plans to reduce the use of pesticides by regulation have not been implemented for the time being, but this should only give producers a short breather. Packaging regulation is already one step further and is likely to pose several challenges.

However, weather conditions once again had the greatest impact on production, the availability of goods, and therefore the market. Weather extremes continue to increase, and so persistent drought was just as much an issue in 2023 as persistent precipitation or short-term heavy rainfall followed by flooding. There were repeated failures and damage to both crops and infrastructure in important European growing regions. On the one hand, a limited supply enables stable or even higher prices. On the other hand, however, this does not always compensate for a lack of volume. The extreme weather conditions are also a challenge in terms of quality. Optimum supply and optimum protection of the plants are essential, especially under difficult conditions, to produce sustainable and safe food.

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In cooperation with:
FRUITNET

Population 448.4 m

Area 4,381,300 km²

GDP per Inhabitant 35,430 EUR

GDP Growth 3.2 per cent

Unemployment 4.0 per cent

CPI for Food (2015=100) 118.8

EUROPEAN UNION

The term 'crisis' is now used in an almost inflationary manner. Not everything that is labelled a crisis has far-reaching consequences, but it's also true that 2023 was again full of challenges. These related to many areas: politics, society, economics, and climate. Many also affected the fruit and vegetable sector, from production, transport, and trade, to the end consumer.

Now approaching the end of its second year, the war in Ukraine is a constant concern. While the initial consequence – high prices for energy and fertilisers – has eased, others remain. National budgets are burdened by high expenditure on military aid, and energy cost increases in 2022 are only now having a real impact on some production areas. In October, a second conflict broke out. The resumption of fighting in Israel and Palestine makes for a tense Middle East. Major shipping companies have decided to avoid the Suez Canal until further notice, which lengthens transport routes and increases transport costs accordingly. The global conflicts are also responsible for a continuing flow of refugees. This creates obligations and challenges for some European nations, and changes the political landscape. In Poland, for example, a pro-Europe opposition has taken power, while in the Netherlands a shock election result brought victory for right-wing populist Geert Wilders. The consequences are not yet foreseeable.

Inflation in the EU weakened somewhat over the course of 2023. However, it should not be forgotten that the continuing price increases relate to an already high price level from 2022. The cost-of-living price index in the EU-27 stood at 127 per cent in November (against 2015 as the benchmark). Compared with November 2022, this was an increase of around 4 percentage points. Food became 9 per cent more expensive for consumers in Europe compared with the same month a year before. The increase here was therefore higher than for the cost of living overall. This is a consequence of the fact that energy prices have fallen again, while food contributed to inflation in 2023. Fruit and vegetables, which were still wrongly associated with the previous year's high inflation rate, were also price drivers last year. The price index for fruit rose by 11 percentage points in November compared with the previous year, while the increase for vegetables was as high as 13 per cent. The higher prices at consumer level were a consequence of the fact that the market was often characterised by a rather tight supply. Against this backdrop, it was possible to push through higher producer prices. This would have been necessary in 2022 to cover the increased production costs.

But have producer prices already risen sufficiently, or will the increase be offset by even greater increases in production costs? The producer price index for fresh vegetables in the EU-27 rose to 156 per cent in the third quarter of 2023 (again, with 2015 as 100 per cent). This was 14 points higher than in the third quarter of the previous year. The producer price index for fruit fell by 8 points year-on-year to 155 per cent. The price index for agricultural inputs fell by 17 points to 138 per cent in the same period. The main reason for this was the fall

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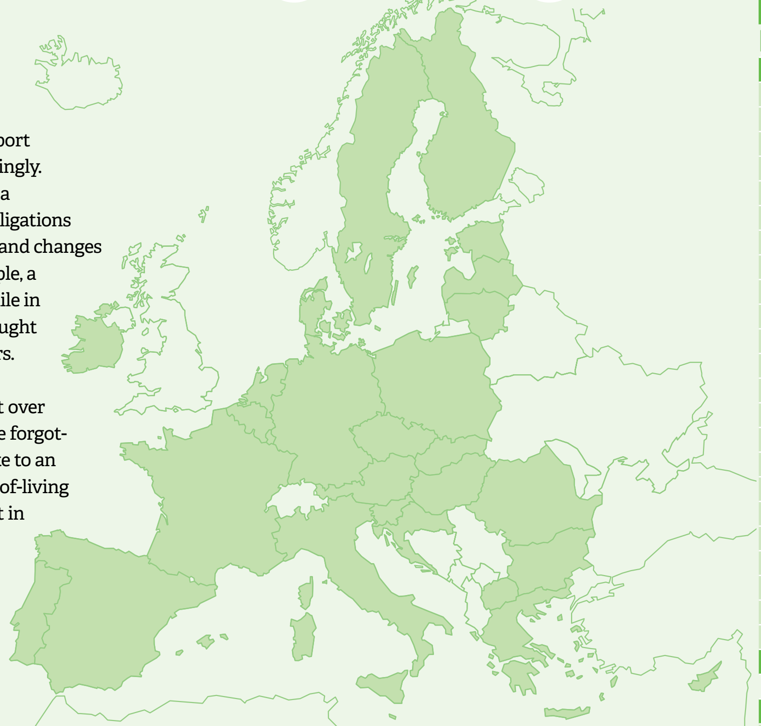


PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	10,496	11,834	11,796	11,411
Oranges	6,538	6,586	5,880	5,409
Watermelons	2,905	3,146	2,686	3,089
Easy peelers	3,303	3,307	3,061	3,030
Peaches	2,529	2,160	2,299	2,493
Pears	2,219	1,721	2,003	1,746
Melons	1,766	1,807	1,627	1,586
Table grapes	1,748	1,720	1,676	1,408
Nectarines	1,017	907	961	1,076
Other	10,349	10,120	10,161	10,089
TOTAL	42,871	43,308	42,149	41,338

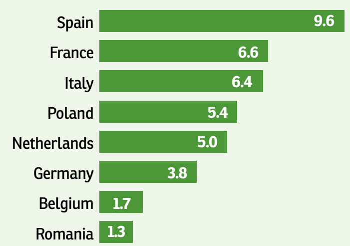
FRESH VEGETABLES [1]	2020	2021	2022	2023p
Onions, dry	6,582	7,284	6,205	6,519
Tomatoes [2]	6,343	6,843	6,231	6,202
Carrots	4,819	5,246	4,412	4,854
Peppers	2,940	3,200	3,110	3,048
Cabbage	3,055	3,025	2,694	2,990
Cucumbers	2,599	2,533	2,412	2,509
Lettuce	2,337	2,444	2,273	2,341
Cauliflower	2,190	2,160	1,969	1,871
Courgettes	1,701	1,698	1,596	1,644
Other	15,174	15,278	15,406	15,228
TOTAL	47,741	49,710	46,309	47,204

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

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

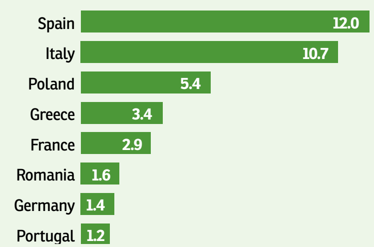
TOP 8 VEGETABLE PRODUCERS 2022 [3]

(million tonnes)



TOP 8 FRUIT PRODUCERS 2022

(million tonnes)



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Spain	14,179	14,007	11,958	12,099
Italy	10,366	9,875	10,732	10,455
Poland	4,422	5,321	5,363	4,900
France	2,737	2,628	2,954	3,090
Greece	3,220	3,033	3,404	3,051
Romania	1,892	2,037	1,608	1,845
Germany	1,352	1,301	1,384	1,210
Portugal	1,141	1,369	1,207	1,161
Hungary	939	1,095	823	952
Netherlands	749	717	725	675
Belgium	616	666	649	670
Bulgaria	302	352	306	320
Austria	193	188	237	191
Croatia	156	155	165	169
Czechia	143	141	162	125
Cyprus	107	103	104	110
Slovenia	60	51	67	63
Lithuania	67	51	67	47
Sweden	54	48	51	45
Denmark	51	45	55	43
Slovakia	40	44	43	37
Ireland	26	23	31	26
Other EU	57	57	55	54
TOTAL	42,871	43,308	42,149	41,338

FRESH VEGETABLES [3]	2020	2021	2022	2023p
Spain	9,971	10,430	9,593	9,497
Italy	7,146	7,070	6,423	6,985
France	5,263	5,642	6,645	6,635
Poland	5,240	5,369	5,443	5,180
Netherlands	5,383	5,695	4,959	4,851
Germany	3,967	4,339	3,846	3,996
Belgium	1,726	2,007	1,661	1,800
Romania	1,957	1,941	1,255	1,718
Greece	1,583	1,602	1,291	1,351
Hungary	1,110	1,088	982	1,060
Portugal	1,101	1,201	1,010	1,010
Austria	644	675	674	651
Sweden	395	409	385	368
Bulgaria	316	329	317	321
Finland	297	284	289	281
Denmark	303	265	255	262
Lithuania	220	238	256	246
Ireland	222	231	222	229
Czechia	252	275	246	214
Croatia	174	140	130	127
Slovakia	119	142	130	126
Slovenia	134	114	90	88
Other EU	217	223	207	210
TOTAL	47,741	49,710	46,309	47,204

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in prices for fertilisers and energy. In contrast, prices for seeds and seedlings, pesticides and machinery continued to rise. In addition, new increases in the minimum wage have had a negative impact on economic results in some countries. All in all, and without taking a closer look at individual types of fruit or vegetables, developments on the cost and revenue side are likely to have largely balanced each other out in 2023.

One of the biggest challenges in the coming years – and 2023 has already provided a foretaste of this – is likely to be the issue of water. Naturally, the first thoughts here are of a lack of rainfall, drought, and water sources drying up. However, in some countries, last year showed that even too much water can seriously disrupt production plans. Persistent rainfall from October onwards in Germany, France and the Benelux meant disruption to harvesting of autumn and stored vegetables. The resulting quality uncertainties will accompany the entire storage season. It was not only the drought that caused problems throughout the entire growing season in 2023. Regions of Spain, Italy and Greece, for example, were hit by severe storms that caused damage and reduced supply due to heavy rain and hail. At other times, however, there were phases in which high temperatures and strong radiation impaired quality and led to cancellations. Greece experienced the worst forest fires ever recorded in the EU. There were also extensive forest fires in the Canary Islands, parts of Portugal and Sicily. Globally, 2023 was the warmest year since records began. In July, temperatures in southern Europe reached well over the 40°C mark. Rising water temperatures in the world's oceans increase the risk of storms.

Production naturally feels the impact of the weather the most. According to provisional figures, almost as much fruit and veg was harvested in the EU-27 during 2023 as in the previous year, but the 2022 harvest was already below average. In addition, the effects of the unfavourable weather conditions on the quality of stored produce cannot yet be fully assessed for some types of fruit and vegetables. That's true for cabbage, carrots and onions, and later varieties of citrus, kiwifruit, or stored vegetables. High sorting losses can still result in fewer goods being available, even though the gross harvest volumes were high. The overall picture also blurs the different trends in fruit and vegetables.

The EU's combined fruit harvest in 2023 was almost 2 per cent lower than in the previous year. The decline

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IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	3,135	3,333	3,196	3,213
Apples	1,925	1,910	1,787	1,778
Oranges	1,814	1,715	1,763	1,666
Watermelons	1,395	1,377	1,223	1,464
Easy peelers	1,439	1,460	1,392	1,359
Table grapes	915	941	982	958
Lemons	887	861	789	787
Pears	692	739	727	697
Avocados	503	542	582	602
Other	4,921	4,990	4,827	4,016
TOTAL	17,625	17,868	17,270	16,541

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes	2,069	2,048	1,969	2,006
Cucumbers	1,159	1,140	1,117	1,219
Onions	1,183	1,231	1,218	1,165
Lettuce	1,055	1,118	1,127	1,114
Peppers	1,106	1,113	1,074	1,031
Carrots	1,001	989	900	896
Cauliflower	432	440	457	431
Courgettes	420	429	387	423
Mushrooms	308	322	295	293
Other	2,809	2,972	2,928	2,993
TOTAL	11,542	11,802	11,473	11,571

EXPORTS – INTRA EU

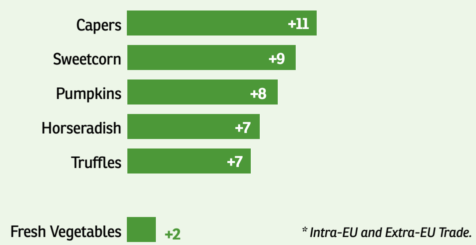
VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	3,041	3,115	2,998	2,999
Oranges	2,146	1,999	2,000	1,896
Apples	1,890	1,846	1,690	1,737
Easy peelers	1,528	1,523	1,455	1,438
Other	9,474	9,797	9,187	8,346
TOTAL	18,079	18,279	17,330	16,416

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes	2,154	2,140	2,175	2,175
Onions	1,170	1,146	1,185	1,244
Lettuce	1,188	1,257	1,199	1,184
Peppers	1,188	1,170	1,112	1,096
Other	6,204	6,455	6,156	6,259
TOTAL	11,903	12,168	11,827	11,958

TOP 5 FRESH VEGETABLE IMPORTS*

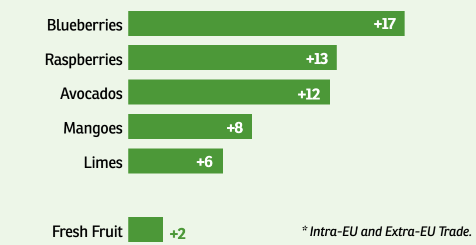
VOLUME GROWTH (% p.a. 2013-2022)



** Intra-EU and Extra-EU Trade.*

TOP 5 FRESH FRUIT IMPORTS*

VOLUME GROWTH (% p.a. 2013-2022)



** Intra-EU and Extra-EU Trade.*

IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	5,287	5,269	5,099	5,153
Oranges	930	900	736	1,010
Pineapples	776	828	779	769
Avocados	604	680	677	747
Table grapes	498	577	614	559
Watermelons	421	424	510	494
Easy peelers	411	456	408	493
Lemons	391	407	468	436
Apples	360	344	275	241
Other	2,206	2,176	2,086	1,981
TOTAL	11,885	12,062	11,651	11,882

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes	621	705	795	790
Onions	275	293	211	413
Peppers	220	242	232	259
Carrots	79	69	64	124
Cucumbers	100	126	106	92
Courgettes	59	63	73	71
Mushrooms	30	29	30	27
Lettuce	16	14	14	22
Cauliflower	11	9	6	13
Other	561	589	537	547
TOTAL	1,972	2,139	2,068	2,359

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	1,071	1,141	1,098	1,053
Oranges	396	376	384	327
Easy peelers	355	313	323	310
Avocados	103	94	95	103
Other	2,034	1,863	1,769	1,616
TOTAL	3,959	3,787	3,669	3,408

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Onions	1,333	1,240	1,343	1,102
Tomatoes	442	378	358	354
Peppers	318	289	300	287
Lettuce	246	245	239	231
Other	1,262	1,308	1,266	1,216
TOTAL	3,601	3,459	3,506	3,191

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

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is mainly seen in apples, pears, grapes, and oranges. Although there were no major spring frosts, conditions during flowering were not optimal in many European countries, meaning that fewer insects flew, and pollination was weak. This was particularly noticeable in apples and even more so in pears. The sharp decline in pears is mainly due to Italy, where the already low expectations were further depressed by the storms. Italy is also responsible for most of the decline in grapes. The stonefruit harvest in 2023 was slightly better than in the previous, loss-making year. And area restrictions for melons were not fully reflected in harvested volumes.

The vegetable harvest in the EU-27 was estimated to be almost 2 per cent higher in 2023 than in the previous year. While the summer drought in 2022 reduced yields, the water supply in some parts of Europe was better last year. A significant increase is therefore expected for carrots and head cabbage. However, it was not yet clear at the time of reporting whether those large quantities would be available for the market. This is because the harvest took place under difficult conditions due to the rainfall between September and November. Sorting losses were high right from the start. This also applies to onions, where more was harvested than in the previous year, but for which the shelf-life was also critically assessed. In France, the weather hampered cauliflower output, resulting in significantly lower harvests. Smaller quantities of greenhouse vegetables, especially tomatoes and peppers, are expected compared with the previous year. This is partly a result of late planting to save on energy costs, but in the case of tomatoes it is also due to viral diseases. The fact that the decline in tomato volumes is limited is also due to some producers switching back from small-fruited to large-fruited standard panicles. For cost reasons, consumer demand has shifted somewhat away from small-fruited clusters. Due to weather conditions, cucumbers were in short supply and expensive at the beginning of the year and into March. Subsequently, however, the market ended up oversupplied, and prices were under pressure.

Imports of fruit and vegetables into the EU, which fell in 2022, appear to have stabilised at current levels. A further slight decline in fruit was offset by slightly higher imports of vegetables in 2023.

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Netherlands	5,374	5,666	5,598	5,416
Germany	5,632	5,495	5,211	4,641
France	3,394	3,596	3,471	3,112
Spain	1,831	2,006	2,031	2,190
Italy	2,050	1,987	1,854	1,870
Belgium	2,242	2,202	2,075	1,851
Poland	1,715	1,716	1,577	1,456
Portugal	903	893	877	894
Romania	819	830	853	766
Austria	718	655	676	673
Sweden	679	670	654	577
Other	4,152	4,214	4,044	4,979
TOTAL	29,509	29,930	28,921	28,423

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Spain	7,489	7,351	6,655	5,681
Netherlands	4,328	4,447	4,235	3,973
Italy	2,620	2,620	2,543	2,264
Belgium	1,968	1,916	1,823	1,591
Greece	1,364	1,258	1,316	1,189
Poland	995	1,293	1,054	1,073
France	953	906	1,004	914
Germany	610	640	596	538
Portugal	536	500	622	519
Austria	206	178	156	168
Slovenia	197	199	177	149
Other	773	758	818	1,766
TOTAL	22,038	22,066	20,999	19,824

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	33,166	33,550	35,143	35,636
Export	25,815	26,359	27,099	26,783
TRADE BALANCE	-7,351	-7,191	-8,044	-8,853

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Germany	3,503	3,564	3,206	2,922
France	1,886	1,954	1,918	1,771
Netherlands	1,407	1,585	1,440	1,463
Belgium	1,145	1,152	1,097	1,038
Poland	779	784	896	807
Spain	642	696	716	747
Italy	651	638	679	696
Czechia	471	457	459	432
Romania	356	389	387	375
Austria	314	332	329	337
Sweden	348	348	356	318
Other	2,012	2,043	2,057	3,023
TOTAL	13,514	13,941	13,541	13,930

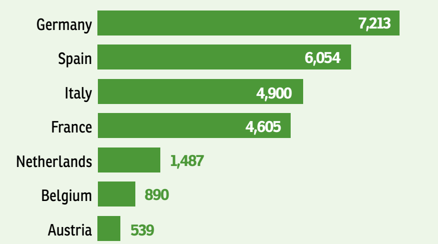
EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Spain	5,415	5,358	4,937	4,737
Netherlands	5,043	5,017	4,914	4,666
France	1,002	1,027	1,108	1,030
Italy	862	911	841	797
Belgium	970	889	814	755
Poland	689	734	885	742
Portugal	231	279	328	420
Germany	417	442	414	355
Austria	168	192	207	197
Greece	133	158	152	160
Hungary	84	94	89	100
Other	489	527	644	1,190
TOTAL	15,505	15,627	15,333	15,149

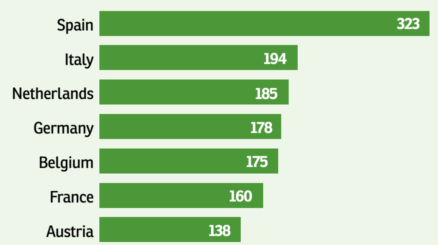
HOUSEHOLD DEMAND 2022 [1]

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



HOUSEHOLD DEMAND 2022 [1]

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



TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Import	15,986	17,105	18,539	20,209
Export	17,254	18,522	19,842	21,378
TRADE BALANCE	+1,268	+1,418	+1,303	+1,169

1) Excluding potatoes.

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

Population
9.1 m

Area
83,900 km²

GDP per Inhabitant
49,400 EUR

GDP Growth
3.6 per cent

Unemployment
3.3 per cent

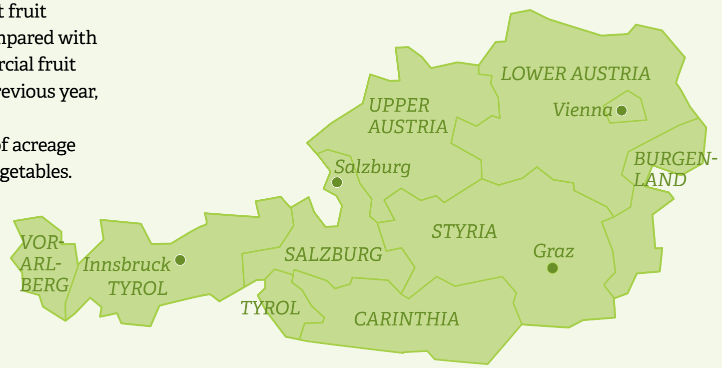
CPI for Food
(2015=100)
121.1

AUSTRIA

Austria's fruit harvest was affected not only by poor weather during flowering, but also late frosts, in 2023. All types of fruit recorded significant declines in volume compared with the previous year. According to Statistics Austria, around 190,500 tonnes of fruit were harvested, excluding some minor berries. Not only did this fall short of the 2022 result by a fifth, but there was also a 10 per cent decline compared with the ten-year average. The reasons for the low harvest volume are the massive late frosts, poor flowering weather and local storms with heavy rain and hail. At just under 162,900 tonnes (-20 per cent), apples and pears accounted for 85 per cent of the fruit harvest in Austria. The country harvested a total of 8,100 tonnes (-27 per cent) of stonefruit and around 19,300 tonnes (-17 per cent) of soft fruit. For apples and pears, good blossom set was undermined by the frosts, while stonefruit, especially apricots, suffered massive frost damage in the Wachau region. Only soft fruit showed an increase in volume, 9 per cent compared with the ten-year average. The area under commercial fruit cultivation remained unchanged from the previous year, totaling 10,440ha.

In the case of vegetables, the expansion of acreage in 2023 did not affect yields for all types of vegetables. This was due not only to the later start to the season because of the cool spring, but also to drought, heavy rainfall and hail, which put pressure on yields. According to Statistics Austria, the country harvested just under 651,500 tonnes of vegetables. Although this is 3 per cent less than in the previous year, it exceeded the five-year average by 3 per cent. Around 164,300 tonnes (-2 per cent) of fruit vegetables were harvested. A cool, low-lit spring meant a later start to the season, and that delay was not fully recovered over the course of the summer. Harvested volumes of cabbage, leafy vegetables and stem vegetables amounted to 137,200 tonnes, which corresponds to a decrease of 3 per cent compared with 2022. Across the board, smaller quantities of brassicas were harvested than in the previous year, while the volume of lettuce increased by 10 per cent overall. The largest vegetable categories remained pulses, root veg, and onions, of which around 350,000 tonnes (-4 per cent) were recently harvested. Onions account for almost a quarter of total vegetable production in Austria. The area under vegetables reached 18,945ha in 2023, an increase of 3 per cent on the previous year.

After inflation in Austria reached a historic high of 11.2 per cent in January 2023, the inflation rate gradually fell over the course of the year and stood at 5.4 per cent in both October and November, according to Statistics Austria. The Oesterreichische Nationalbank expects 7.7 per cent inflation for the calendar year 2023. This is due to the delayed effect of falling energy prices and the sharp rise in prices for services and food. For the years 2024 to 2026, inflation is expected to fall to 4 per cent, 3 per cent and 2.5 per cent respectively due to the elimination of price pressure from energy. However, this puts the inflation rate in Austria above the eurozone average for the entire forecast period.



PRODUCTION

VOLUME ('000 tonnes)

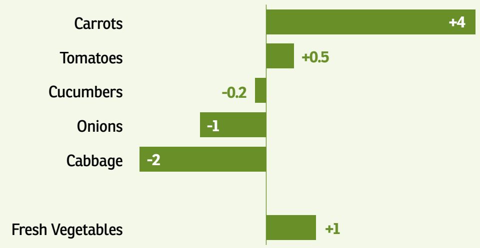
FRESH FRUIT [1]	2020	2021	2022	2023p
Apples	160	152	191	156
Strawberries	13	14	17	15
Pears	8	8	12	7
Apricots	1	4	5	4
Currants	3	3	3	2
Blueberries	2	2	2	2
Sweet cherries	1	1	2	2
Plums	2	2	2	1
Peaches	1	1	2	1
Other	1	1	1	1
TOTAL	193	188	237	191

FRESH VEGETABLES [1 2]	2020	2021	2022	2023p
Onions	154	169	175	160
Carrots	116	118	118	121
Tomatoes	59	60	57	57
Cucumbers	46	48	44	43
Red/white cabbage	40	41	46	39
Iceberg lettuce	22	23	22	25
Sweetcorn	13	15	19	19
Celeriac	14	14	15	13
Peppers	15	15	13	13
Other	166	172	165	174
TOTAL	644	675	674	651

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

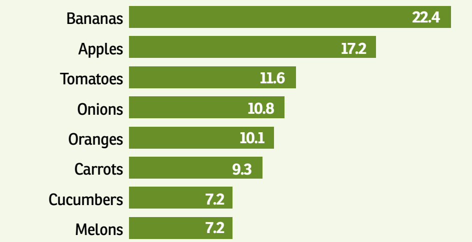
TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2014-2023)



TOP 8 FRUIT AND VEGETABLES 2022

HOUSEHOLD PURCHASES (kg)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	147	141	154	160
Apples incl. cider	96	67	70	75
Oranges	58	56	53	57
Watermelons	43	38	43	50
Easy peelers	41	37	37	36
Lemons	40	34	34	35
Table grapes	40	42	38	33
Pears incl. cider	22	16	19	22
Other	255	242	244	341
TOTAL	719	657	673	728

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	47	51	63	81
Peppers	55	59	59	66
Lettuce	36	37	38	42
Cucumbers/Gherkins	30	34	30	33
Courgettes	19	20	19	20
Mushrooms	14	13	11	12
Kohlrabi, Savoy	14	15	9	9
Onions	10	12	8	8
Other	89	90	87	94
TOTAL	314	331	323	365

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples incl. cider	64	53	42	54
Sweet cherries	19	21	13	24
Bananas	11	8	8	9
Table grapes	10	12	9	7
Other	103	84	83	88
TOTAL	207	178	155	182

FRESH VEGETABLES	2020	2021	2022	2023p
Onions	57	66	76	78
Tomatoes	12	19	30	43
Peppers	28	31	32	36
Carrots	16	15	13	14
Cucumbers/Gherkins	14	15	17	13
Other	40	45	31	46
TOTAL	168	192	200	230

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	946	923	963	1,091
Export	291	283	246	278
TRADE BALANCE	-654	-640	-717	-813

FRESH VEGETABLES	2020	2021	2022	2023p
Import	508	537	608	716
Export	143	158	210	278
TRADE BALANCE	-365	-379	-398	-438

Population
11.8 m

Area
30,500 km²

GDP per Inhabitant
47,430 EUR

GDP Growth
2.2 per cent

Unemployment
3.4 per cent

CPI for Food
(2015=100)
123.3

BELGIUM

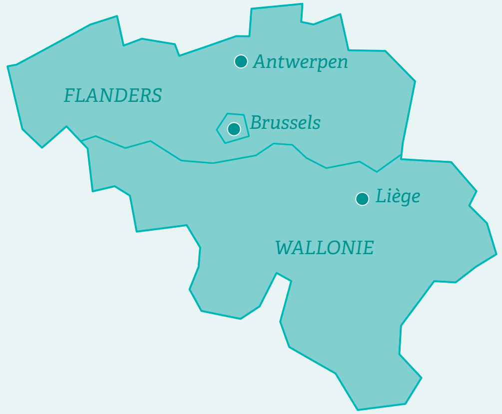
Belgium's fruit and vegetable business was on the move in 2023. While the EU expected its second-smallest pear harvest in 2023/24, Belgium was the exception. Contrary to that declining cultivation trend, pear production area in Belgium has expanded steadily in recent years – or at least remained at a stable level. This season, Belgium looks forward to a record harvest of 412,000 tonnes, putting it at the top of the list of European producing countries. Meanwhile Italy, the market leader in Europe, has been pushed far back in the rankings due to massive crop failures caused by late frosts and flooding. This opens sales markets for Belgium's Conference pears not only within the EU-27, but also in third markets such as Brazil and China, where the country's exports are in demand. On the other hand, apple production in Belgium has shrunk continuously in recent years due to unsatisfactory market prices.

Last year also saw key investments. BelOrta, Belgium's largest cooperative fruit and vegetable auction, opened a new automated sorting centre for apples and pears in Borgloon in August this year. Using state-of-the-art optical sensors and infrared cameras, the fruit is checked and sorted for external and internal quality. Its capacity is 40,000 to 60,000 tonnes of apples and pears per year. A merger between BelOrta and Belgische Fruitveiling, approved by the Belgian competition authority in September 2023, also made headlines. While BelOrta generated most of its turnover from vegetables in previous years, Belgische Fruitveiling, based in Sint-Truiden, specialises primarily in the sale of topfruit.

Coöperatie Hoogstraten in Belgium and Fruit-Masters in the Netherlands also appear closer to a potential collaboration on strawberries, and are already investigating cooperation models such as a merger or bundling. This would create cross-border benefits for the strawberry sector. For example, supply chain costs could be reduced, or variety innovations introduced. If the organisations were to merge, their combined annual turnover from strawberries could amount to more than €200m.

Belgium also has a strong position in the frozen vegetable processing industry. In terms of vegetable cultivation, last ueyeara once again brought weather extremes, from drought to prolonged rainfall and flooded fields in November. Due to the waterlogged fields, at times vegetable processing was only running at half capacity at times – and this at the busiest time of the year. There were also reports of increased disease risk and root damage from the wet soil.

In Belgium, inflation fell significantly over the course of the year and, according to estimates by the Belgian government's planning office, will be 4.1 per cent in 2023, compared with 9.6 per cent in 2022. This is due to the decline in energy prices. Inflation is expected to fall further to 3.8 per cent in 2024. Overall, Belgium has one of the lowest inflation rates in the eurozone.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Pears	393	356	346	412
Apples	168	250	239	198
Strawberries	43	51	49	47
Other	12	9	15	13
TOTAL	616	666	649	670

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes	312	283	299	298
Leeks	109	127	105	103
Carrots	67	100	66	70
Peppers	25	27	35	36
Cucumbers	28	32	35	35
Lettuce	33	32	31	33
Witloof chicory	32	33	28	31
Celeriac	14	16	15	15
Courgettes	12	11	13	12
Other [2]	1,094	1,346	1,034	1,167
TOTAL	1,726	2,007	1,661	1,800

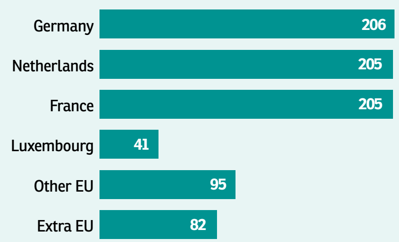
1) Excluding potatoes, open field and under glass.
2) Including products cultivated for processing.

TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2013-2022)

FRESH VEGETABLE EXPORTS 2022

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VBT

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Exotics	1,620	1,607	1,491	1,367
Citrus	235	231	221	223
Apples	119	106	91	75
Pears	44	43	47	47
Other	229	217	229	221
TOTAL	2,246	2,203	2,079	1,934

FRESH VEGETABLES	2020	2021	2022	2023p
Carrots/Turnips	270	250	238	242
Onions/Shallots	133	115	115	121
Peas	116	142	91	103
Green beans	103	113	95	90
Cucumbers	67	66	61	78
Tomatoes	59	58	74	77
Peppers	51	53	55	54
Other	346	354	360	344
TOTAL	1,145	1,151	1,088	1,109

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Exotics	1,388	1,300	1,180	1,212
Pears	310	357	342	319
Apples	153	133	166	148
Strawberries	43	38	38	34
Other	77	90	105	104
TOTAL	1,971	1,918	1,831	1,817

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	260	228	210	203
Carrots/Turnips	231	197	156	131
Leeks	70	63	63	57
Cucumbers	46	48	43	56
Onions/Shallots	52	37	55	55
Peppers	34	38	39	41
Witloof chicory	17	20	24	18
Celeriac	19	20	21	16
Other	241	238	208	188
TOTAL	970	889	819	765

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	2,557	2,416	2,220	2,049
Export	2,052	2,022	2,203	2,272
TRADE BALANCE	-505	-393	-17	223

FRESH VEGETABLES	2020	2021	2022	2023p
Import	875	900	941	1,080
Export	807	864	883	942
TRADE BALANCE	-68	-36	-58	-138

Population
68.1 m

Area
633,200 km²

GDP per Inhabitant
38,550 EUR

GDP Growth
2.1 per cent

Unemployment
4.6 per cent

CPI for Food
(2015=100)
114.0

FRANCE

2023 was another challenging year for French agriculture. Extreme weather, rising energy costs and inflation made it difficult to grow fruit and vegetables.

Constantly rising energy and production costs are a challenge for the country's producers. Interprofessional organisation Interfel has already warned of the effects of French energy policy. Without a cap on gas and electricity prices, it will not be possible to maintain the agricultural and food chains, it says. Russia's war against Ukraine triggered a wave of inflation, which according to the Banque de France will fall to 4.5 per cent in the fourth quarter of 2023 and decrease to around 2 per cent by 2025. The French government wants to give its programme to limit pesticides another chance, with the central goal of its Ecophyto 2030 plan to halve their use by 2030, based on the period 2015 to 2017.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2020	2021	2022	2023p
Apples	1,337	1,383	1,391	1,450
Melons	290	271	307	316
Bananas	208	226	226	229
Apricots	84	55	123	126
Peaches	95	91	116	114
Nectarines	81	82	110	114
Pears	133	58	147	105
Plums [2]	226	106	82	90
Strawberries	77	74	79	74
Kiwifruit	50	46	46	48
Other	156	236	327	424
TOTAL	2,737	2,628	2,954	3,090

FRESH VEGETABLES	2020	2021	2022	2023p
Carrots	641	691	662	650
Tomatoes	698	727	711	647
Onions	604	580	511	615
Sweetcorn	426	462	413	435
Green beans	382	425	378	396
Peas	268	314	296	306
Leeks	170	180	158	163
Cauliflower	230	239	184	160
Lettuce	191	184	179	160
Witloof chicory	171	158	126	126
Other	2,123	2,373	3,689	3,627
TOTAL	5,263	5,642	6,645	6,635

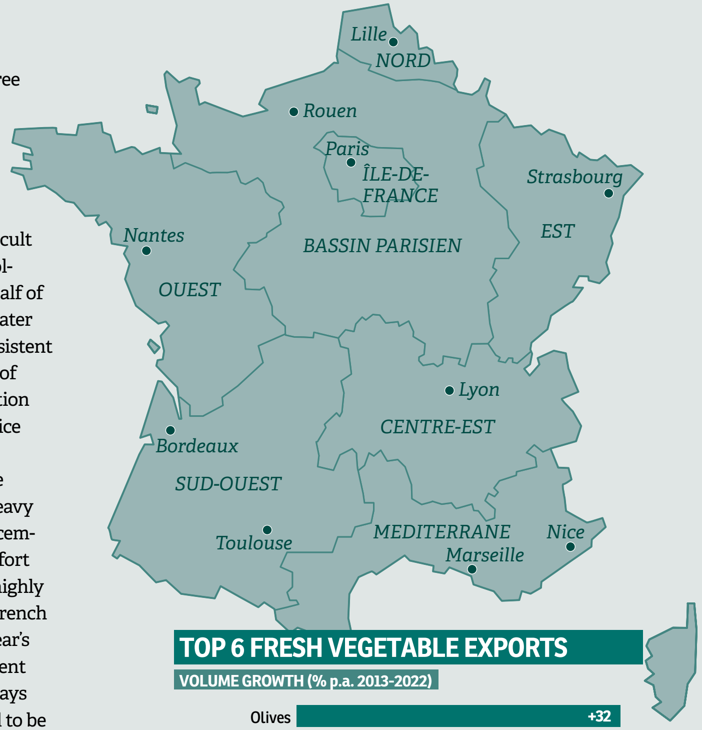
1) Including overseas departments. 2) Including greengages and mirabelles. 3) Including broccoli. 4) Including red cabbage.

Spain, Germany, and Belgium remained the three most important importers of French fruit and vegetables in 2023. As in previous years, France's trade balance remained negative.

In 2023, agriculture was characterised by changing weather conditions. As early as spring 2023, cold and wet conditions made field work difficult and sowing was delayed in some cases. This was followed by periods of heat and drought in the first half of the summer. Many crops had to be irrigated and water resources became tight. At the end of the year, persistent rainfall and wet conditions hampered the harvest of many vegetable crops. Inflation and rising production costs for energy, packaging and transport led to price increases.

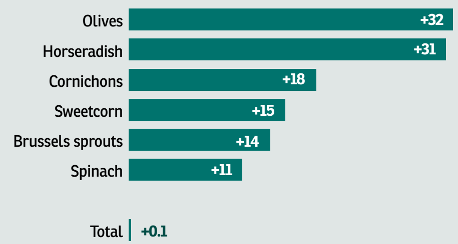
French vegetable production suffered from the changing climate. In November, thunderstorms, heavy rain, and storms affected the carrot harvest. In December, the soil was still too wet to drive on, and the effort required for quality-related sorting of what were highly variable crops was high. Prices for carrots on the French wholesale markets rose steadily as a result. Last year's onion harvest was estimated to be around 20 per cent larger than the previous year's. Spring brought delays to planting, while a hot summer meant onions had to be watered. Rainfall hampered the harvest and affected the quality. At the end of the year, there were high sorting losses due to quality. Tomato production for the fresh market was estimated to be almost 9 per cent lower in 2023 than in 2022 – mainly due to energy savings and the resulting yield losses in greenhouse production. The open-field tomato harvest was estimated to be higher than in 2022. Cauliflowers were also in short supply at the end of the year. The persistent rainfall limited supply and prices were high.

After two campaigns in which frosts significantly reduced the stone fruit harvest, France can look back on an almost optimal harvest of peaches and nectarines in 2023. There was no significant frost damage or hail events. However, some growing regions suffered from persistent drought and were subject to strict irrigation restrictions. According to estimates in October 2023, the apple harvest in south-east France was lower than originally forecast. In other regions, the harvest volume will be in line with forecasts. Apple quality is said to be good, so only a small percentage will be sent for processing, and relatively high prices will be achieved.



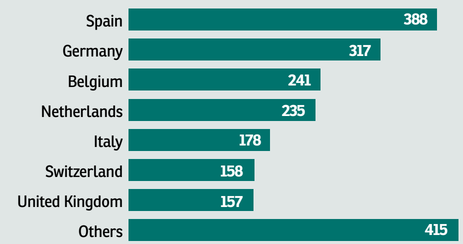
TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2013-2022)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2022)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	699	748	760	786
Oranges	479	454	496	440
Clementines	360	365	391	373
Watermelons	240	254	259	269
Avocados	171	182	201	188
Apples	136	219	140	146
Pineapples	129	143	146	142
Others	974	1,038	923	911
TOTAL	3,187	3,404	3,316	3,254

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	508	516	570	554
Sweet peppers	166	170	172	167
Carrots	165	158	134	150
Courgettes	155	149	151	149
Onions	127	126	110	131
Cucumbers	70	65	71	69
Others	695	770	734	700
TOTAL	1,886	1,954	1,942	1,920

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	400	303	333	304
Bananas	181	221	234	231
Watermelons	54	70	76	88
Oranges	46	36	44	43
Avocados	29	32	40	38
Others	236	232	265	274
TOTAL	946	895	992	979

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	252	277	320	328
Beans	113	125	105	110
Cauliflower [3]	109	102	105	107
Onions	104	74	126	85
Peas	65	84	57	66
Carrots	74	59	54	56
Other	286	308	329	348
TOTAL	1,002	1,027	1,096	1,099

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	3,807	4,070	4,207	4,390
Export	1,140	1,129	1,281	1,320
TRADE BALANCE	-2,667	-2,941	-2,926	-3,070

FRESH VEGETABLES	2020	2021	2022	2023p
Import	2,280	2,389	2,629	2,834
Export	1,077	1,179	1,318	1,506
TRADE BALANCE	-1,203	-1,210	-1,311	-1,328

Population
84.4 m

Area
357,300 km²

GDP per Inhabitant
46,260 EUR

GDP Growth
1.1 per cent

Unemployment
2.2 per cent

CPI for Food
(2015=100)
118.7

GERMANY

While fresh fruit and vegetables contributed little to the overall rise in Germany's fresh food prices in 2022, the situation was different in 2023. In some months, fruit and vegetables made a significant contribution to price increases on fresh food sales. There are several reasons for this, but rising costs in production, transport and trade alone were not sufficient. Rather, unstable weather conditions, contributed to a lack of supply peaks. Against this backdrop, average producer prices for almost all products were sustainably increased. At the same time, demand from private consumers recovered slightly. Although purchased volumes did not return to the levels seen during the coronavirus pandemic, consumers did buy slightly more fresh fruit and vegetables than in 2022.

The vegetable market was already in short supply at the start of last year. German onion and carrot stocks sold out early after a small 2022 harvest. At the same time, fewer vegetables were available from Spain due to weather conditions. Among the products to benefit from this was white cabbage, as food retailers kept it on sale for longer. The situation was somewhat different for fruit. Due to weak sales figures, apple stocks remained high at the start of 2023 and there was no scope for higher prices. This only changed from April. In contrast, the supply of citrus fruit from southern Europe was lower than in other years. Germany's early vegetable season began hesitantly and with slowly increasing volumes. Although there were no significant frosts in the spring, it was too cool for a long time and there was a lack of sunlight, which meant that the first crops were slow to develop. In addition, some areas could not be used at first due to the rainfall between January and March. The wet spring was followed by a dry phase in the months of May and June. During this time, as in the previous year, the need for additional irrigation was high. The rain came from July onwards. In some places it was long-lasting, in others it rained heavily in a short space of time. As a result, harvesting, maintenance work and the planting of subsequent crops were delayed. In some cases, there were failures and increased sorting losses. As a result, harvests will not be large. Overall, however, the 2023 vegetable harvest is estimated to be almost 4 per cent higher than in the previous year.

Not everything went smoothly for fruit either. Although there was largely no frost damage, the conditions during flowering were not ideal. A lack of insect activity meant that pollination was poor for many types of tree fruit. The strawberry blossom, and therefore also the harvest, extended over a long period of time. Some later crops fell victim to hail and heavy rain. It also rained during the cherry harvest, resulting in lower yields. Plums and blueberries were also unable to realise their full yield potential. In the case of apples, good fruit size development could not compensate for a lack of volume, which meant the harvest was significantly smaller (-13 per cent) than in the previous year.

In view of Germany's partially limited availability, foreign suppliers had opportunities to position themselves on the market. However, fruit and vegetable imports were again slightly lower than in the previous year. Weather conditions were not ideal in key countries of origin either, meaning that fewer goods were available there as well.

PRODUCTION

VOLUME ('000 tonnes)

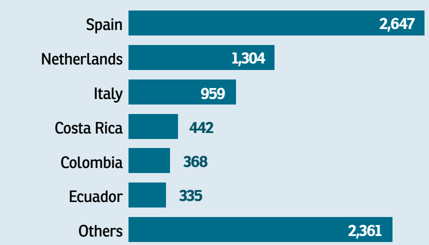
FRESH FRUIT [1]	2020	2021	2022	2023p
Apples	1,023	1,005	1,071	922
Strawberries	152	131	133	117
Plums	47	40	47	45
Pears	39	37	36	36
Sweet cherries	37	27	38	32
Currants	12	14	14	16
Blueberries	11	16	15	15
Sour cherries	13	11	10	8
Mirabelle plums	5	5	5	7
Other	13	16	14	13
TOTAL	1,352	1,301	1,384	1,210

FRESH VEGETABLES [2 3]	2020	2021	2022	2023p
Carrots	802	962	780	850
Onions	540	664	578	580
White cabbage	446	435	385	430
Gherkins	149	171	169	165
Iceberg lettuce	128	131	139	132
Red cabbage	125	142	112	125
Asparagus	118	119	110	106
Tomatoes	102	99	102	100
Beetroot	99	110	94	98
Other	1,458	1,506	1,376	1,410
TOTAL	3,967	4,339	3,846	3,996

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

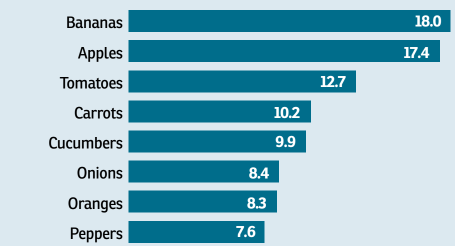
FRESH FRUIT AND VEGETABLE IMPORTS

BY ORIGIN ('000 tonnes, 2022)



TOP 8 FRUIT AND VEGETABLES 2022

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	1,353	1,420	1,291	1,324
Watermelons	513	437	414	425
Oranges	499	485	448	424
Apples	550	510	448	423
Table grapes	347	333	356	363
Easy peelers	393	402	369	361
Lemons	233	221	198	193
Pears	158	167	178	161
Pineapples	127	131	139	134
Other	1,459	1,390	1,374	1,384
TOTAL	5,632	5,495	5,214	5,192

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	743	756	655	657
Cucumbers/Gherkins	589	598	544	560
Peppers	419	420	397	372
Lettuce	306	329	298	280
Onions	246	236	213	233
Carrots	252	242	209	228
Courgettes	111	111	97	99
Broccoli, Cauliflower	81	83	100	86
Mushrooms	92	89	81	81
Other	664	701	608	559
TOTAL	3,503	3,564	3,202	3,155

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	301	341	309	326
Apples	56	61	51	54
Table grapes	26	23	25	24
Oranges	22	23	19	17
Other	204	192	188	174
TOTAL	610	640	593	595

FRESH VEGETABLES	2020	2021	2022	2023p
Onions	65	52	71	64
Carrots	44	56	33	59
White cabbage	50	61	63	50
Lettuce	46	48	54	44
Other	213	225	197	174
TOTAL	417	442	417	391

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	7,043	6,926	7,159	7,400
Export	726	728	728	743
TRADE BALANCE	-6,317	-6,198	-6,431	-6,657

FRESH VEGETABLES	2020	2021	2022	2023p
Import	5,049	5,385	5,444	5,658
Export	404	438	426	431
TRADE BALANCE	-4,644	-4,947	-5,018	-5,227

Population
10.4 m

Area
132,000 km²

GDP per Inhabitant
19,550 EUR

GDP Growth
6.3 per cent

Unemployment
7.5 per cent

CPI for Food
(2015=100)
111.2

GREECE

Farmers in Greece suffered particularly badly from the consequences of climate change in 2023. One disaster followed another. Initially, the spring was relatively too cool, the summer brought heat, and for months it did not rain at all, or only sporadically. Water reserves dwindled, soils dried out, and the risk of forest fires increased. The latter flared up from July onwards – the understaffing of the Greek fire services was noticeable, especially as the summer wind Meltemi made firefighting work more difficult. In the summer of 2023, Greece experienced the worst forest fires in the history of the country and the European Union. Those fires raged worst in the north-east of Greece in the Dadia National Park. After the forest fires, Storm Daniel hit Greece in early September, causing severe flooding.

Some of Greece's topfruit is grown in Thessaly and therefore in the disaster areas. Even before the floods came, Greece expected a smaller apple harvest due to alternance. In 2023, the harvest was expected to be 40 per cent smaller than in the previous year. Due to the unstable weather, the 2023 stonefruit season was delayed by around one week compared with the previous year. The cultivation area for peaches has tended to be reduced in recent years due to a lack of profitability. Tree fruit cultivation has shifted more towards the cultivation of cherries, kiwifruit, and apricots. On the other hand, nectarines have seen an increase in acreage due to stronger consumer demand. The harvest forecasts for grapes had already been downgraded in the summer of 2023. This is because the months of heat and the associated lack of rainfall affected fruit size and therefore yields.

Greece is the EU's fourth-largest producer of fresh fruit. Producers have responded to market trends in recent years and taken opportunities to establish themselves more strongly on the international market. As a result, Greece is hot on the heels of Italy in terms of kiwifruit production volumes, thanks to its expansion of cultivation areas in recent years. The classic green and yellow kiwifruit varieties have been joined by red-fleshed ones. Kiwifruit is now one of Greece's top-selling export products within the fruit range. After the high production of the 2022/23 season, there will be cutbacks for the 2023/24 season. Greece expects to be able to harvest 311,000 tonnes of kiwifruit. The storm at the beginning of September caused only limited damage, and area for strawberries was also steadily expanded.

Numerous types of vegetables suffered from the heat, so harvested quantities of head cabbage were lower. Peak yields were also not achieved for lettuce and fruit vegetables. Tomatoes had phytosanitary problems, which meant that some growers switched their production to cucumbers. In the case of onions, persistent rainfall caused downy mildew infestation and thus lower harvest volumes.

PRODUCTION

VOLUME ('000 tonnes)

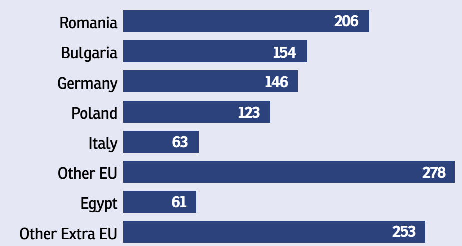
FRESH FRUIT	2020	2021	2022	2023p
Oranges	887	818	874	850
Watermelons	431	479	435	380
Kiwifruit	307	319	320	311
Table grapes	273	264	290	250
Peaches [1]	185	110	209	194
Easy peelers	172	181	201	180
Apples	280	246	294	175
Nectarines	105	50	144	140
Strawberries	84	86	100	80
Other	497	479	537	491
TOTAL	3,220	3,033	3,404	3,051

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes [1]	536	581	432	511
Peppers	164	138	136	145
Cucumbers	137	134	120	118
Onions	172	138	116	89
Lettuce	75	82	57	63
Spinach	67	96	69	61
Courgettes	64	61	54	60
Aubergines	61	60	45	58
Cabbage	69	66	50	41
Other	237	247	213	205
TOTAL	1,583	1,602	1,291	1,351

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

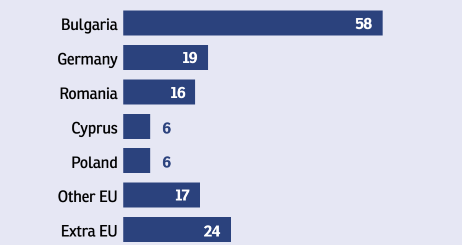
FRESH FRUIT EXPORTS 2022

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2022

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	206	210	205	222
Lemons	25	22	25	24
Apples	21	31	13	19
Pineapples	13	17	18	18
Other	35	38	133	39
TOTAL	300	318	394	322

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes [1]	14	20	16	26
Onions	18	11	8	25
Mushrooms	10	13	14	16
Other	35	34	38	37
TOTAL	77	78	76	104

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Oranges	323	329	266	347
Kiwifruit	167	163	186	198
Watermelons	205	209	192	167
Easy peelers	119	132	131	144
Strawberries	55	68	75	78
Bananas	54	52	59	68
Apples	75	78	72	66
Peaches	94	39	70	54
Nectarines	66	20	57	52
Table grapes	68	54	47	44
Cherries	32	27	24	26
Other	106	87	104	124
TOTAL	1,363	1,258	1,283	1,368

FRESH VEGETABLES	2020	2021	2022	2023p
Cucumbers	37	48	53	54
Tomatoes	36	39	32	38
Carrots	4	8	6	11
Other	56	63	59	67
TOTAL	133	158	150	170

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	217	230	256	269
Export	944	912	1,005	1,142
TRADE BALANCE	+727	+682	+749	+873

FRESH VEGETABLES	2020	2021	2022	2023p
Import	74	85	95	121
Export	104	138	143	175
TRADE BALANCE	+30	+53	+48	+54

Population	**Area**	**GDP per Inhabitant**	**GDP Growth**	**Unemployment**	**CPI for Food**
58.9 m	302,100 km²	33,020 EUR	4.1 per cent	4.6 per cent	(2015=100) 114.2

ITALY

The last few years have not been easy for Italy's fruit and vegetable sector. Unfortunately, the situation did not improve in 2023. In addition to persistently high production costs and labour shortages, the season for many crops was affected by the weather. There was no snow or rain in the winter of 2022/23. In the spring, water levels in Italian rivers and lakes were low. Italy was largely spared from late spring frosts, but torrential rainfall in May flooded whole areas of Emilia-Romagna. This damaged important tree fruit crops such as peaches. This was followed by a dry and hot summer in the following weeks. This also affected the growth of fruit crops such as grapes and apples, which was reflected in the harvest. A reduction in the area planted with pears, kiwifruit and table grapes also had a significant impact on the harvest. According to initial estimates, Italy produced around 10.45m tonnes of fresh fruit and just under 7m tonnes of vegetables in 2023. After a weak harvest in 2022, the vegetable harvest was better in 2023, but Italy was still below average.

Another trend weighing on the sector is the year-on-year decline in household consumption of fresh fruit and vegetables. Figures from the Italian Household Panel show a 7 per cent year-on-year decline in purchases for January to September. Inflation had already dampened demand in 2022, when each Italian household bought around 217kg of fruit and vegetables. This negative trend continued in 2023, because fruit and vegetables cost around 11 per cent more in the first nine months than in the same period of the previous year. This means that total expenditure will increase by 3 per cent in the period up to 2023.

An increase in trade prices on the European market led to a positive trade balance in 2023, despite the decline in fruit exports. This was also the case for vegetables, which are also on the rise in terms of volume. Even if Italy loses market share to competitors for some types of fruit, such as on pears to Belgium and the Netherlands, or on kiwifruit to Greece, it remains an important supplier for Europe. For some years now, Italy has tried to find new trading partners outside Europe.

In 2023, negotiations were successfully concluded with China and South Korea. As a result, Italy has found new customers for both peaches and kiwifruit. Thailand (pears) and Taiwan (apples) are two other markets where Italy hopes to become established.

PRODUCTION

VOLUME ('000 tonnes)

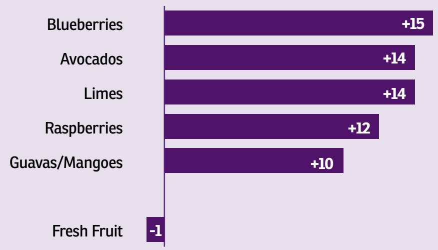
FRESH FRUIT	2020	2021	2022	2023p
Apples	2,124	2,053	2,113	2,050
Oranges	1,773	1,793	1,817	2,025
Melons	1,297	1,276	1,238	1,450
Table grapes	1,064	1,041	1,010	910
Easy peelers	660	831	820	835
Lemons	473	473	483	515
Nectarines	372	350	505	445
Peaches [2]	380	353	438	420
Kiwifruits	305	303	365	311
Others	1,919	1,402	1,943	1,494
TOTAL	10,366	9,875	10,732	10,455

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes [2]	1,049	1,066	971	1,070
Courgettes	600	602	559	580
Carrots	494	498	354	510
Fennel	514	501	327	510
Lettuce	487	490	469	480
Onions	458	416	397	390
Artichokes	367	376	378	370
Cauliflower/Broccoli	365	360	352	345
Aubergines	305	306	307	330
Sweet peppers	248	244	233	235
Others	2,259	2,211	2,076	2,165
TOTAL	7,146	7,070	6,423	6,985

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

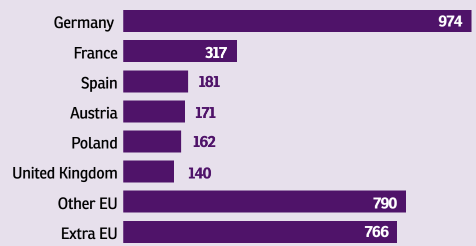
TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2013-2022)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2022)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	810	811	783	820
Oranges	243	133	195	210
Pineapples	136	151	144	145
Peaches/Nectarines	114	106	62	95
Others	747	785	690	715
TOTAL	2,050	1,986	1,874	1,985

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes [2]	131	128	145	150
Lettuce	115	116	129	140
Onions	64	57	55	95
Others	341	337	353	340
TOTAL	651	638	682	725

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	911	908	855	830
Table grapes	469	466	445	425
Kiwifruit	276	269	269	305
Watermelons	320	282	261	235
Oranges	113	129	96	100
Bananas	81	104	91	95
Peaches/Nectarines	78	98	140	85
Pears	92	72	53	75
Easy peelers	61	53	59	60
Others	214	232	261	210
TOTAL	2,615	2,613	2,530	2,420

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Lettuce	193	195	201	205
Carrots	107	98	74	95
Cauliflower/Broccoli	78	91	82	80
Tomatoes	63	70	59	70
Kohlrabi/Kale	70	79	68	65
Beetroot	58	58	59	65
Fennel	62	59	48	55
Spinach	28	39	37	35
Courgettes	25	26	28	25
Others	178	196	175	185
TOTAL	862	911	831	880

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	1,879	1,882	1,893	2,180
Export	2,935	3,082	3,176	3,300
TRADE BALANCE	+1,056	+1,200	+1,283	+1,120

FRESH VEGETABLES	2020	2021	2022	2023p
Import	728	810	984	1,210
Export	1,396	1,591	1,582	1,850
TRADE BALANCE	+668	+781	+598	+640

Population *17.8 m*

Area *41,500 km²*

GDP per Inhabitant *54,150 EUR*

GDP Growth *3.3 per cent*

Unemployment *2.6 per cent*

CPI for Food *(2015=100) 122.8*

NETHERLANDS

Despite being one of the smaller countries in the EU, the Netherlands plays a significant role as a trading hub for imports and exports due to its long and strategically located coastline. And although its production is relatively modest, it is the second-largest exporter of fresh fruit among EU countries, after Spain. Additionally, many fruit imports enter Europe through Dutch ports.

In the Netherlands, there was again more heated, illuminated winter production in 2023 than in the previous year. In 2022, growers had significantly restricted heated cultivation due to high energy prices. However, the early vegetable season started late in 2023 and with slowly increasing volumes due to an initial lack of temperature and radiation. In May and June, it looked as if drought would once again be the dominant issue. However, the dry months were replaced by continuous rain in parts of July and August.

In spring 2023, sowing for onions was delayed. In the first half of the summer, the heat and drought initially increased irrigation requirements. Abundant rainfall in the second half of the summer promoted growth but reduced the quality. In autumn, some of the onions had to wait too long in excessively damp conditions for storage. However, at an estimated 1.2m tonnes, the total harvest volume in 2023 will hardly differ from the previous year (-0.5 per cent). The slight difference is due to an increase in acreage (by 7 per cent to 29,300ha).

The harvest of carrots for storage was also delayed by persistent rainfall in October and November. The soil was too wet for heavy harvesters to drive on. Rain-free windows of opportunity were used to continue harvesting on sites with light soils. Fewer carrots were harvested than expected. The quality is also likely to have suffered because of the wet conditions, meaning that there are uncertainties regarding storability.

Winter tomato crops were smaller in 2023. They were planted later and there were fewer small-fruited varieties. This was because some growers had switched to normal vine tomatoes due to virus infections in plant material. The harvest of cucumbers also started later, but the area was larger than in the previous year, and the harvest lasted longer in autumn. Fewer peppers were also harvested. They were not brought to market until March instead of early January. In summer, the weather did not favour growth due to a lack of sunlight.

Compared with vegetables, fruit production was significantly lower and consisted mainly of topfruit like apples and pears, as well as strawberries. The most important apple varieties in cultivation were Elstar and Jonagold (including Jonagored). Around 15 per cent fewer apples were produced.

PRODUCTION

VOLUME ('000 tonnes)

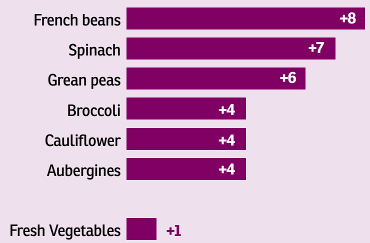
FRESH FRUIT	2020	2021	2022	2023p
Pears	400	340	352	358
Apples	220	243	235	200
Strawberries	78	86	87	85
Other berries	20	21	22	22
Other	31	28	29	10
TOTAL	749	717	725	675

FRESH VEGETABLES	2020	2021	2022	2023p
Onions	1596	1788	1482	1284
Tomatoes	910	880	770	792
Carrots	575	643	489	560
Peppers	430	440	435	430
Cucumbers	430	440	440	421
Mushrooms	260	260	235	243
White cabbage	117	97	106	111
Leeks	90	105	95	92
Iceberg lettuce	90	91	88	89
Celeriac	93	82	80	83
Aubergines	65	63	66	62
Brussel sprouts	55	63	62	59
Witlof chicory	53	59	50	54
Spinach	72	75	56	51
Other	547	611	504	520
TOTAL	5,383	5,695	4,959	4,851

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

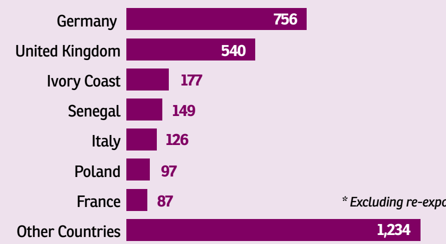
TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2013-2022)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION* ('000 tonnes, 2022)



** Excluding re-exports.*

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [2]	2020	2021	2022	2023p
Bananas	1,330	1,469	1,467	1,413
Oranges	622	621	569	644
Avocados	414	458	463	496
Table grapes	401	460	502	452
Watermelons	180	188	177	356
Mangoes	278	298	280	284
Other	2,166	2,190	2,134	2,003
TOTAL	5,391	5,684	5,592	5,648

FRESH VEGETABLES	2020	2021	2022	2023p
Onions	239	317	181	257
Tomatoes	227	243	257	251
Cucumbers	107	96	106	134
Peppers	105	106	92	92
Other	729	823	795	851
TOTAL	1,407	1,585	1,431	1,585

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [2]	2020	2021	2022	2023p
Total [1]	4,333	4,452	4,249	4,347
Dutch origin only				
Pears	203	208	204	193
Strawberries	18	23	21	20
Apples	57	24	22	22
Other	3	7	5	23
TOTAL	282	262	252	258

FRESH VEGETABLES	2020	2021	2022	2023p
Total [1]	5,043	5,017	4,972	4,810
Dutch origin only				
Onions	1,266	1,205	1,263	1,177
Tomatoes	725	722	626	605
Peppers	329	340	332	328
Cucumbers	311	334	287	304
Cabbage	89	101	107	95
Carrots	48	51	68	64
Other	237	236	231	246
TOTAL	3,005	2,990	2,914	2,818

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT [2]	2020	2021	2022	2023p
Import	6,991	7,109	7,691	7,880
Export [1]	6,898	7,067	7,152	7,703
TRADE BALANCE	-93	-42	-540	-177

FRESH VEGETABLES	2020	2021	2022	2023p
Import	1,694	1,836	2,015	2,178
Export [1]	5,684	5,825	6,126	6,583
TRADE BALANCE	+3,990	+3,989	+4,111	+4,405

Population
22.2 m

Area
819,900 km²

GDP per Inhabitant
55,480 EUR

GDP Growth
1.7 per cent

Unemployment
4.5 per cent

CPI for Food
(2015=100)
115.6

NORDIC COUNTRIES

DENMARK, FINLAND, SWEDEN

The economy in the Nordic countries is only recovering slowly. Although inflation has slowed in many areas, prices are still rising. Real wages are falling, and domestic demand is weakening. Added to this are high interest rates and weakening export demand. Although this only affects horticultural products to a limited extent, it has an impact on the economy. The economy is in a slight recession and the recovery is slower than initially expected. The war in Ukraine casts a long shadow over sentiment and perceptions of security. This particularly affects Finland, which borders Russia.

Weather conditions in the Nordic countries were also changeable in 2023 and not ideal to produce fruit and vegetables. Although production benefited from slightly higher temperatures overall, July and August were too cool and too wet on average. In addition, a storm in early August caused damage to infrastructure in many Nordic countries and led to disruptions in production and transport.

Fruit and vegetable harvest estimates show that the negative effects of sometimes extreme weather conditions outweigh the positive ones. At around 116,000 tonnes, the fruit harvest in 2023 will be almost 13 per cent lower than in the previous year. The main impact will come from the smaller apple harvests in Denmark and Sweden. In Finland, a similar quantity to the previous year is expected. The vegetable harvest, on the other hand, is estimated to be only 2 per cent lower than in the previous year. Overall, the vegetable harvest in the Nordic countries amounts to 911,000 tonnes. Only Denmark expects a slightly larger quantity than in the previous year. However, here too it is questionable whether a bigger carrot harvest will ultimately have an impact on the market. The rainfall in autumn was not ideal for this crop.

The lower production volumes for fruit and vegetables also had an impact on foreign trade. The effect was stronger for vegetables than for fruit. Imports of fresh vegetables to the Nordic countries increased by 9 per cent year on year to 741,000 tonnes. Denmark imported a larger quantity of vegetables. Imports to Finland, on the other hand, were down on the previous year. At 82,000 tonnes, exports of vegetables were 10 per cent lower than in the previous year. This was mainly due to lower exports of carrots from Denmark, a consequence of the small 2022 harvest. The trade balance for vegetables is already negative. This became even clearer in 2023. In purely numerical terms, the Nordic countries are around 55 per cent self-sufficient in fresh vegetables. However, the level of self-sufficiency has fallen continuously in recent years.

Imports of fresh fruit to the Nordic countries did not quite reach the previous year's level. At 1.26m tonnes, around 3 per cent less was imported than in the previous year. This is mainly due to lower imports of bananas to Sweden and Finland. Denmark, on the other hand, imported more fresh fruit than in the previous year. At 86,000 tonnes, exports were almost 8 per cent down on the previous year. The foreign trade deficit did not deteriorate further compared with the previous year. However, the calculated level of self-sufficiency fell to 8 per cent. In the previous year, with a large domestic harvest, it was still a good 9 per cent.

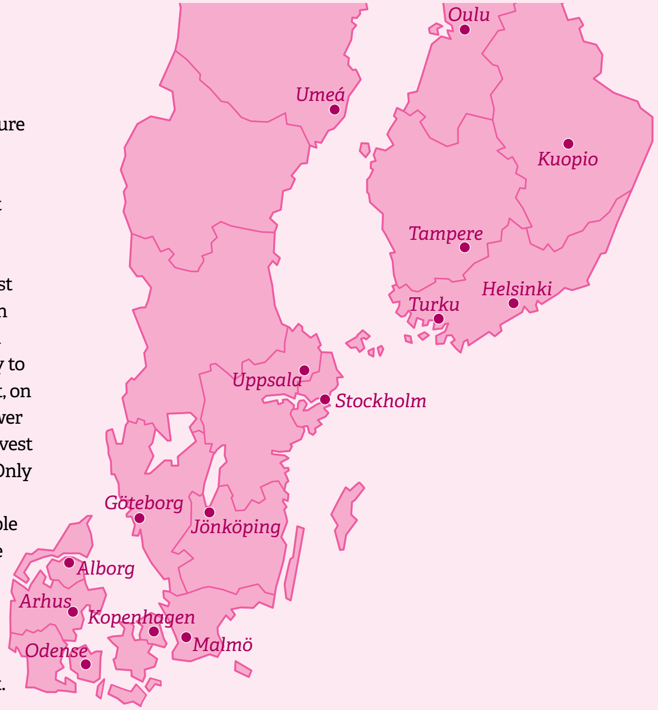
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Denmark	**51**	**45**	**55**	**43**
– Apples	24	18	24	15
– Pears	6	6	7	7
– Strawberries [2]	6	7	6	7
Finland	**25**	**28**	**28**	**28**
– Strawberries [2]	15	16	16	16
– Apples	7	8	7	7
Sweden	**54**	**48**	**51**	**45**
– Apples	32	27	30	24
– Strawberries [2]	17	16	16	16
TOTAL	**130**	**121**	**133**	**116**

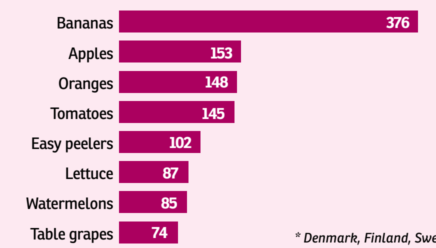
FRESH VEGETABLES [1]	2020	2021	2022	2023p
Denmark	**303**	**265**	**255**	**262**
– Carrots	94	82	75	80
– Onions	70	61	65	64
– White cabbage	26	15	11	12
Finland	**297**	**284**	**289**	**281**
– Carrots	81	76	76	71
– Tomatoes	41	38	34	36
Sweden	**395**	**409**	**385**	**368**
– Carrots	118	123	114	105
– Onions	65	55	61	62
TOTAL	**995**	**958**	**930**	**911**

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



FRUIT AND VEGETABLE IMPORTS 2022

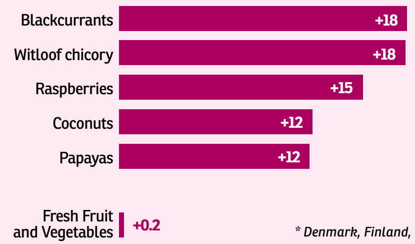
BY NORDIC COUNTRIES* ('000 tonnes)



** Denmark, Finland, Sweden.*

TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH* (% p.a. 2013-2022)



** Denmark, Finland, Sweden.*

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Denmark	**397**	**412**	**368**	**378**
– Bananas	76	83	82	84
– Oranges	48	47	47	46
– Apples	53	59	41	45
Finland	**329**	**318**	**280**	**251**
– Bananas	110	109	101	89
– Apples	42	33	29	29
Sweden	**690**	**680**	**646**	**632**
– Bananas	188	189	193	187
– Oranges	76	79	73	77
TOTAL	**1,416**	**1,410**	**1,294**	**1,261**

FRESH VEGETABLES	2020	2021	2022	2023p
Denmark	**206**	**219**	**201**	**282**
– Tomatoes	37	38	38	35
– Cucumbers	23	25	25	25
– Lettuce	24	26	25	25
Finland	**117**	**119**	**128**	**103**
– Tomatoes	26	25	24	23
– Lettuce	23	24	24	22
Sweden	**355**	**355**	**348**	**356**
– Tomatoes	88	89	83	81
– Cucumbers	38	37	36	37
TOTAL	**678**	**693**	**677**	**741**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Denmark	**43**	**37**	**31**	**37**
– Bananas	2	2	4	9
– Apples	9	8	6	5
Finland	**6**	**7**	**7**	**5**
Sweden	**44**	**50**	**54**	**44**
TOTAL	**92**	**93**	**93**	**86**

FRESH VEGETABLES	2020	2021	2022	2023p
Denmark	**54**	**53**	**64**	**54**
– Carrots	31	30	35	29
– Onions	5	5	7	7
Finland	**2**	**2**	**7**	**5**
Sweden	**18**	**20**	**19**	**23**
TOTAL	**74**	**75**	**91**	**82**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	1,737	1,739	1,673	1,636
Export	124	122	127	123
TRADE BALANCE	**-1,613**	**-1,617**	**-1,546**	**-1,512**

FRESH VEGETABLES	2020	2021	2022	2023p
Import	1,122	1,208	1,218	1,309
Export	134	146	162	159
TRADE BALANCE	**-988**	**-1,063**	**-1,055**	**-1,149**

Population 36.8 m

Area 312,700 km²

GDP per Inhabitant 17,300 EUR

GDP Growth 6.2 per cent

Unemployment 1.8 per cent

CPI for Food (2015=100) 129.4

POLAND

Fluctuating weather conditions did not help Poland's production of fruit or vegetables in 2023. According to current estimates, its open-field vegetable harvest will fall by just under 5 per cent compared with the previous year. The harvest is expected to amount to around 5.18m tonnes. The persistent drought in the summer of 2023, which severely restricted plant development in many places, once again had a decimating effect. The losses were only less acute in fields with irrigation systems. This was particularly unfavorable for cabbage varieties, especially cauliflower and broccoli. The cauliflower harvest is currently estimated at 128,000 tonnes and would fall short of the previous year's level by around 3 per cent. The onion harvest (-2 per cent; 636,000 tonnes) and carrot production (-7 per cent; 578,000 tonnes) are also expected to fall compared with 2022. In the transition to autumn, persistent rainfall also decimated vegetable yields from region to region, which is why the harvest of crops for storage is likely to be lower.

In contrast to the vegetable harvest, fruit production in Poland was estimated to be significantly lower. At a total of 4.9m tonnes, the previous year's figure was missed by around 9 per cent. The apple harvest was hit particularly hard in 2023. This is because low temperatures and a lack of rainfall led to lower fruit set. As a result, the apple harvest is expected to fall 11 per cent short of the previous year at 3.8m tonnes. Pear production was less badly affected. According to current estimates, harvested volume is expected to be similar to the previous year's. The persistent drought in the summer also reduced the plum harvest by around 8 per cent to an estimated 123,000 tonnes. However, cherry yields are also expected to fall (-10 per cent; 165,000 tonnes).

In terms of foreign trade, apple exports from Poland fell significantly and lost market share. On the one hand, Belarus contributed to the lower exports, which made crossing the border much more difficult. On the other hand, the decline in apple exports to Egypt, which used the available foreign currency to buy grain, had a much greater impact. In the 2022/23 season, apple exports to Egypt fell from just under 154,000 to 74,000 tonnes. Fewer apples for processing were also exported to Germany. The decline in exports could hardly be compensated for by sales to other countries.

According to current estimates, vegetable exports are also below the previous year's level. Although demand for vegetables is increasing in EU countries due to weaker yields, Poland is also subject to fluctuating weather conditions. With an estimated 850,000 tonnes of vegetable exports, Poland fell 7 per cent short of the previous year's level.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2020	2021	2022	2023p
Apples	3,410	4,300	4,265	3,800
Strawberries	144	156	185	180
Sour cherries	157	167	184	165
Currants	146	152	146	130
Plums	112	117	133	123
Raspberries	123	104	105	101
Pears	65	70	81	81
Sweet cherries	44	59	77	71
Blueberries	55	55	64	62
Other	166	141	125	187
TOTAL	4,422	5,321	5,363	4,900

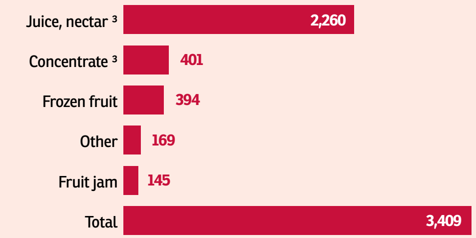
FRESH VEGETABLES [2]	2020	2021	2022	2023p
Tomatoes	741	813	788	770
Onions	660	617	650	636
Cabbage	710	687	644	632
Carrots	671	638	620	578
Cucumbers	448	432	472	462
Mushrooms	340	345	350	340
Beetroot	261	239	242	259
Cauliflower	150	130	132	128
Other	1,259	1,468	1,545	1,375
TOTAL	5,240	5,369	5,443	5,180

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

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

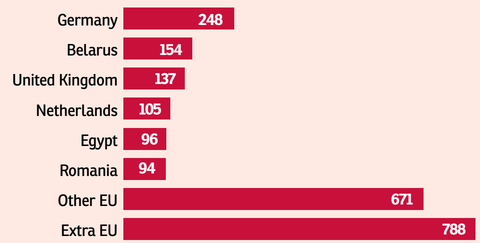
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2022/23)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2022)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	564	523	449	487
Watermelons	161	187	166	172
Easy peelers	164	170	157	156
Oranges	134	157	155	145
Lemons	136	135	129	128
Other	557	545	513	461
TOTAL	1,715	1,716	1,569	1,548

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	175	174	181	209
Onions	151	158	220	169
Cucumbers	67	73	79	81
Peppers	72	68	69	66
Other	315	311	386	381
TOTAL	779	784	935	905

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	647	917	693	795
Pears	99	120	108	118
Bananas	85	70	57	46
Cider apples	13	22	40	30
Blueberries	18	22	23	22
Easy peelers	20	19	18	17
Strawberries	15	19	14	20
Other [4]	99	105	91	80
TOTAL	995	1,293	1,045	1,127

FRESH VEGETABLES	2020	2021	2022	2023p
Mushrooms	226	254	256	250
Onions	144	134	191	151
Tomatoes	72	67	82	75
Cabbage	31	44	65	56
Carrots	22	26	50	37
Peppers	28	22	26	27
Cauliflower, Broccoli	24	23	21	22
Other	143	163	186	177
TOTAL	689	734	878	796

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	1,498	1,557	1,660	2,015
Export	647	727	695	730
TRADE BALANCE	-851	-830	-965	-1,285

FRESH VEGETABLES	2020	2021	2022	2023p
Import	788	860	980	1,093
Export	708	771	914	980
TRADE BALANCE	-80	-89	-40	-113

Population 10.5 m

Area 92,200 km²

GDP per Inhabitant 23,530 EUR

GDP Growth 6.8 per cent

Unemployment 4.0 per cent

CPI for Food (2015=100) 113.0

PORTUGAL

Vegetable production is an important part of Portugal's agriculture. After Italy and Spain, the country is one of the EU's leading producers of tomatoes for processing. However, the country faced considerable challenges in 2023. Cultivation was overshadowed by the water shortage. Around 90 per cent of the soil is clearly too dry and at risk of desertification, and the situation is extremely serious in 40 per cent of the area. However, the situation has eased again this year thanks to the rainfall that began in September and October.

Although it came late, rain in the growing regions has visibly benefited tomato production. With 1.68m tonnes and an increase of 32 per cent compared with 2022, last year is considered the second most productive season on record for industrial tomatoes. Although the tomato moth (Tuta absoluta) attacked the last remaining fields to be harvested, particularly in the final phase, the harvest was satisfactory overall.

The rains also came just in time for kiwifruit. The stress in the crops was reduced well before the start of the harvest, so that the fruit recovered well. The harvest was only one week late and is estimated to be 5 per cent higher than last year. Apples can also boast an increased harvest. In some regions in the west of the country, the fruit was literally burnt on the tree due to drought and heat, but yields in the north-eastern regions compensated for the shortfall. Although a not inconsiderable proportion of the apple harvest had to be diverted to industrial processing for quality reasons, the proportion of table fruit increased.

Pear cultivation, on the other hand, suffers from unfavourable weather conditions during the important growing and ripening periods. The excessive heat reduces the yield. Even at the time of blossoming, temperatures are too high for optimal development. Diseases are more likely to occur later. The additional lack of water leads to limited fruit size development. Due to the high temperatures, colour development is below average. Damage due to sunburn is also frequent. After an already poor harvest year in 2022, this represents another setback for the industry. As pear cultivation has been under pressure for years due to the plant disease fire blight, many pear plantations in the affected areas have been uprooted or abandoned.

In contrast, production of pointed cabbage and savoy cabbage did not increase any further. After the boom of previous years, in which cultivation developed further and further from the initial niche production and is increasingly seen as an alternative on the export markets due to the better growing conditions compared with Italy and France, the weather in the year 2023 was slowing down a renewed increase. However, the trend is not expected to reverse.

Portugal's raspberries have emerged from their niche. Within ten years, exports have increased almost tenfold, and this year stand at almost 29,000 tonnes. There has also been strong growth in blueberries and avocados. However, another year with more difficult or possibly – as in Spain – even limited access to water for horticultural production could significantly halt this development.

PRODUCTION

VOLUME ('000 tonnes)

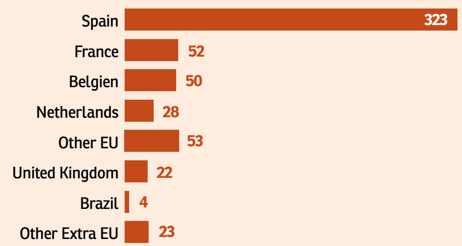
FRESH FRUIT	2020	2021	2022	2023p
Oranges	355	364	378	350
Apples [1]	286	368	291	313
Pears	131	225	132	119
Melons	62	60	60	60
Kiwifruit	46	55	53	56
Easy peelers	42	43	43	40
Peaches	35	42	43	36
Raspberries	25	28	30	30
Watermelons	28	31	30	30
Blueberries	15	17	18	18
Other	214	272	244	248
TOTAL	1,239	1,506	1,323	1,300

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Tomatoes [1]	144	150	128	165
Carrots	134	141	100	120
Cabbage	116	128	128	105
Pumpkins	121	127	81	105
Onions	71	66	60	55
Savoy cabbage	51	56	50	50
Lettuce	62	75	56	45
Peppers	55	54	41	45
Broccoli	46	40	33	33
Other	342	400	305	377
TOTAL	1,140	1,237	984	1,100

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

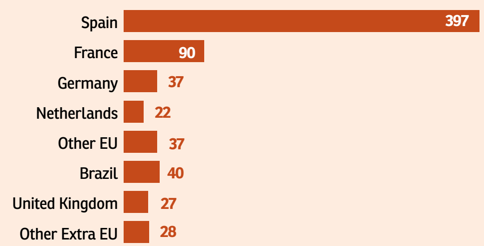
FRESH FRUIT EXPORTS 2022

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2022 [1, 2]

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	243	224	224	234
Oranges	149	121	105	134
Pineapples	57	61	70	69
Apples	49	66	44	64
Melons	54	48	46	46
Watermelons	43	41	47	45
Other	306	332	334	291
TOTAL	903	893	871	882

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Onions	76	75	86	87
Tomatoes [1]	45	41	52	56
Carrots	25	23	30	37
Cauliflower	32	29	30	30
Peppers	18	21	24	24
Pumpkins	14	11	6	9
Other	72	78	83	95
TOTAL	282	279	312	338

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Oranges	155	121	136	121
Pears	96	90	119	76
Apples	68	47	82	59
Lemons	28	33	61	37
Kiwifruit	16	24	30	29
Raspberries	26	27	27	29
Other	148	159	170	153
TOTAL	536	500	624	505

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Carrots	31	29	17	27
Pumpkins	35	34	32	26
Other cabbage	32	34	13	25
Onions	6	5	8	10
Courgettes	8	7	8	9
Leeks	5	5	4	6
Tomatoes [1]	7	8	4	5
Other vegetables	48	58	89	73
TOTAL	173	180	176	182

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	770	763	846	790
Export	685	650	800	740
TRADE BALANCE	-85	-113	-46	-50

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Import	203	214	308	225
Export	171	190	228	205
TRADE BALANCE	-32	-24	-80	-20

Population 48.1 m

Area 506,000 km²

GDP per Inhabitant 28,280 EUR

GDP Growth 5.1 per cent

Unemployment 8.4 per cent

CPI for Food (2015=100) 116.0

SPAIN

Spanish concerns about water availability have increased further following the renewed drought in 2023. As in the previous 12 months, it was much too dry in Spain last year. A lack of rainfall for weeks meant that average soil moisture was below the long-term average in every month except June and September. The driest month, with a deviation of over 10 per cent, was April. As a result, reservoirs are nowhere near as full as in other years. In some cases, only 15 per cent of the demand in the plantations could be met. The crops also suffered from the enormous heat, with regional temperatures rising above 45°C in July and August.

The water shortage also severely affected the cultivation of fruit and vegetables. There were considerable crop failures, especially for summer fruit and vegetables. Rainfall that began in June could not salvage the situation. The harvest estimate for stone fruit for 2023 is likely to be revised downwards significantly in retrospect. The same applies to soft fruit, especially strawberries and melons. There are also reductions in acreage. Within two years, 35 per cent of the area has been lost from melon production. In 2023 alone, 870ha are missing compared with 2022.

There are also shifts in citrus fruit cultivation. Here, cultivation in the Comunidad Valenciana is shifting northwards, away from the growing areas around Murcia and Alicante. Although the crop losses further south were less serious 2023 than in the Valencia region, the conditions further north are generally more favourable. In general, however, the Comunidad Valenciana has lost importance for years.

Times are turbulent on the vegetable market in 2023. The extreme heat in July and August, when many vegetables were planted for the autumn harvest, led to considerable crop losses. The situation for later crops only eased as temperatures dropped. Some were also planted later to avoid heat-related disease risk. There were no major shifts in the areas under cultivation, although slightly less risky vegetables such as courgettes and cucumbers were planted more frequently. Peppers are also being grown slightly more. On the other hand, production of winter crops such as broccoli and other types of cabbage is decreasing. This is due to uncertainty about the availability of sufficient water. In addition, production has become less profitable due to rising production costs. Tomatoes and chilli peppers have also been grown less. For tomatoes, the pressure from the virus ToBRFV is omnipresent. To minimise the risk, many places are restricting access to greenhouses, disinfecting more, and conducting intensive research into resistant varieties.

Around one quarter of all fruit and vegetable production in the European Union is grown in Spain. The country has now experienced its third year of extreme drought. The lack of water is hitting vegetable cultivation particularly hard. Falling harvests coupled with rising production costs are creating a difficult market environment. Development of the water supply is therefore becoming an increasingly important factor for the continued cultivation of fruit and vegetables in Spain.

PRODUCTION

VOLUME ('000 tonnes)

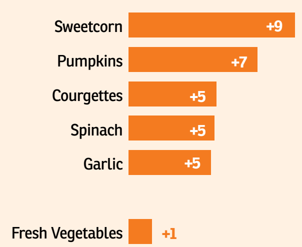
FRESH FRUIT	2020	2021	2022	2023p
Oranges	3,496	3,749	2,873	2,643
Easy peelers	2,317	2,122	1,853	1,853
Lemons	1,142	1,046	1,019	1,365
Watermelons	1,235	1,382	997	1,150
Peaches [1]	534	507	445	635
Nectarines	486	447	380	621
Melons	611	653	528	515
Apples [1]	425	563	412	491
Table grapes	298	308	292	331
Strawberries	273	361	325	327
Other	3,362	2,869	2,834	2,168
TOTAL	14,179	14,007	11,958	12,099

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Tomatoes [1]	1,821	1,734	1,786	1,793
Peppers [1]	1,393	1,406	1,486	1,337
Onions	1,132	1,567	1,132	1,147
Lettuce	962	1,064	933	1,026
Cucumbers	795	746	693	749
Courgettes	631	638	617	563
Broccoli	591	535	472	550
Carrots	393	429	383	316
Garlic	269	316	271	211
Other	1,984	1,995	1,820	1,805
TOTAL	9,971	10,430	9,593	9,497

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

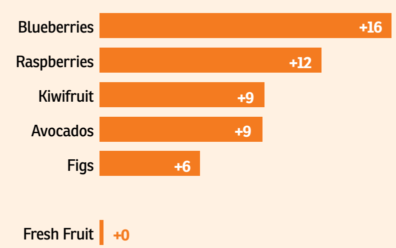
TOP 5 FRESH VEGETABLE EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2013-2022)



TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2013-2022)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	324	369	441	300
Avocados	174	214	209	208
Apples	180	185	223	190
Oranges	191	179	117	150
Other	980	1,073	1,170	970
TOTAL	1,849	2,020	2,160	1,818

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Tomatoes [1]	132	121	186	153
Beans	131	118	114	120
Onions	89	111	96	100
Other	263	295	353	292
TOTAL	615	645	749	665

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Oranges	1,639	1,566	1,615	1,500
Easy Peelers	1,344	1,326	1,044	1,000
Watermelons	840	997	680	850
Lemons	734	734	556	780
Melons	434	431	338	320
Nectarines	329	347	278	280
Strawberries	287	317	278	270
Peaches	325	344	262	250
Persimmons	211	190	119	120
Other	1,284	1,427	1,515	1,530
TOTAL	7,427	7,679	6,685	6,900

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Lettuce	766	812	791	810
Peppers	845	854	796	809
Tomatoes	729	662	635	682
Cucumbers	703	660	697	660
Brassicas	494	539	502	516
Courgettes	426	451	353	383
Onions	356	339	313	322
Aubergines	189	166	151	159
Garlic	189	175	165	158
Other	681	763	580	598
TOTAL	5,378	5,421	4,983	5,097

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	2,222	2,372	2,598	2,510
Export	8,572	9,104	9,592	8,970
TRADE BALANCE	+6,350	+6,732	+6,994	+6,460

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Import	621	652	650	750
Export	5,922	6,464	6,964	6,900
TRADE BALANCE	+5,301	+5,812	+6,314	+6,150

Population 38.9 m | **Area** 498,000 km² | **GDP per Inhabitant** 15,800 EUR | **GDP Growth** 7.0 per cent | **Unemployment** 3.1 per cent | **CPI for Food** (2015=100) 126.7

SOUTHEAST EUROPE

BULGARIA, CROATIA, HUNGARY, ROMANIA

Bulgaria, Croatia, Hungary, and Romania, located in southeast Europe, encompass a combined area of nearly 500,000 sq km. These countries share a rich agricultural heritage, benefiting from favorable weather conditions and fertile soils. In 2023, these nations faced varied economic and environmental challenges that significantly affected their agricultural sectors and consumer markets.

In the realm of agricultural production, Romania leads the way in fresh fruit and vegetable volumes, surpassing Hungary. All four countries experienced a negative trade balance for fresh produce in 2023, with imports playing a critical role in their economies. Notably, about two-thirds of the produce available in Hungary is locally sourced.

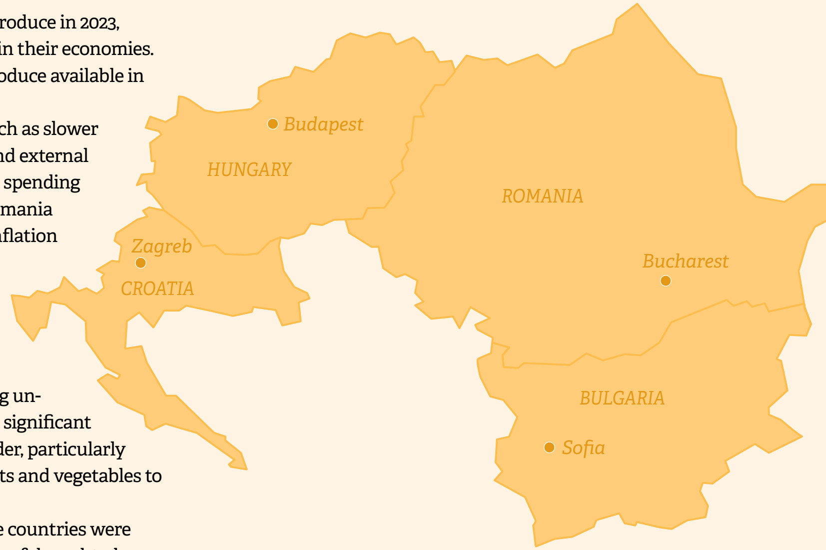
In 2023, economic challenges such as slower GDP growth, high inflation rates, and external pressures led to cautious consumer spending in these countries. Hungary and Romania faced some of the highest annual inflation rates in the EU. These economic conditions were influenced by government measures and regional dynamics, with a focus on stabilising the economy and promoting cautious expenditure during uncertain times. Also, there have been significant delays at the Bulgarian-Turkey border, particularly affecting shipments of Turkish fruits and vegetables to European countries.

The agricultural sectors in these countries were severely impacted by a combination of droughts, heavy rainfall, floods, and cold snaps in 2023. These extreme weather conditions adversely affected fruit and vegetable yields, complicating planting, and harvesting cycles.

A significant shift towards organic farming and sustainable agricultural practices was observed in response to increasing consumer demand for healthier, environmentally friendly produce. Governments in these countries have provided incentives and support to encourage such practices, recognising their long-term environmental and economic benefits.

The retail landscape in these countries is evolving with a growing preference for local produce among consumers. This trend has led to an increase in the farm-to-table movement, offering local farmers more direct and profitable market access. Supermarkets and local markets are increasingly stocking locally sourced products, supporting local economies, and providing consumers with fresher options.

It's important to note that a significant portion of Romania's agricultural produce comes from subsistence farmers who grow crops primarily for personal consumption rather than for sale on the market. This factor should be considered when interpreting the production data, as it affects the overall understanding of the agricultural landscape in these countries.



PRODUCTION

VOLUME ('000 tonnes)

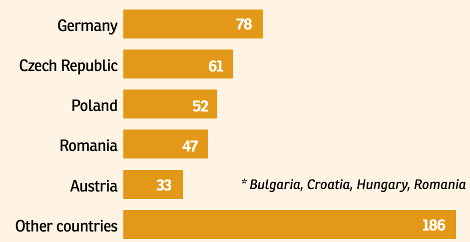
FRESH FRUIT	2020	2021	2022	2023p
Bulgaria	**302**	**352**	**306**	**320**
– Plums	60	65	57	61
– Cherries	57	59	59	57
Croatia	**156**	**155**	**164**	**169**
– Apples	55	65	57	65
– Easy peelers	39	40	42	41
Hungary	**939**	**1,095**	**823**	**952**
– Apples	399	515	350	483
– Sour cherries	61	61	66	68
Romania	**1,892**	**2,037**	**1,608**	**1,845**
– Plums	758	807	666	744
– Apples	537	594	543	558
– Watermelons	259	300	146	235

FRESH VEGETABLES	2020	2021	2022	2023p
Bulgaria	**316**	**329**	**317**	**321**
– Tomatoes	89	94	93	92
– Peppers	51	62	47	53
Croatia	**174**	**140**	**130**	**127**
– Cabbage	34	29	26	29
– Tomatoes	26	13	22	20
Hungary	**1,110**	**1,088**	**982**	**1,060**
– Sweetcorn [1]	511	472	393	459
– Tomatoes [2]	154	172	138	155
– Peppers	86	92	84	87
Romania	**1,957**	**1,941**	**1,255**	**1,718**
– Cabbage	541	548	387	492
– Tomatoes	494	500	299	431
– Onions	230	219	145	198

1) Mainly grown for processing. 2) Excluding products grown for processing.
***Sources:** AMI-informiert.de; Eurostat; Croatian Bureau of Statistics; Hungarian Central Statistical Office; WAPA; trade.gov*

FRUIT AND VEGETABLE EXPORTS 2022

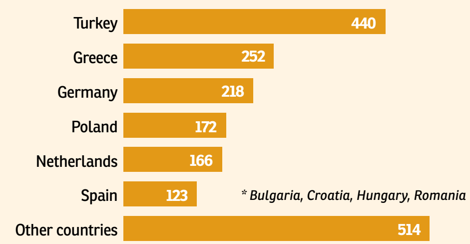
BY SOUTHEAST COUNTRIES* ('000 TONNES)



* Bulgaria, Croatia, Hungary, Romania

FRUIT AND VEGETABLE IMPORTS 2022

BY SOUTHEAST COUNTRIES* ('000 TONNES)



* Bulgaria, Croatia, Hungary, Romania

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bulgaria	**349**	**374**	**381**	**374**
– Bananas	71	73	63	70
Croatia	**207**	**242**	**260**	**272**
– Bananas	78	78	88	89
Hungary	**287**	**291**	**336**	**320**
– Bananas	80	78	83	80
Romania	**819**	**830**	**852**	**861**
– Bananas	222	232	231	229
– Apples	95	90	90	95

FRESH VEGETABLES	2020	2021	2022	2023p
Bulgaria	**226**	**257**	**235**	**241**
– Tomatoes	86	100	90	93
– Peppers	26	33	26	31
Croatia	**105**	**123**	**138**	**144**
– Peppers	17	18	17	21
Hungary	**155**	**179**	**169**	**171**
– Cucumbers	18	26	31	26
Romania	**356**	**389**	**387**	**400**
– Tomatoes	80	89	90	90
– Onions	80	57	63	66

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bulgaria	**50**	**57**	**75**	**68**
– Watermelons	4	3	23	13
Croatia	**71**	**88**	**98**	**100**
– Easy peelers	22	18	20	20
Hungary	**114**	**124**	**128**	**149**
– Watermelons	32	33	30	55
Romania	**26**	**33**	**46**	**37**

FRESH VEGETABLES	2020	2021	2022	2023p
Bulgaria	**45**	**52**	**35**	**38**
Croatia	**24**	**27**	**29**	**34**
Hungary	**84**	**94**	**88**	**103**
– Peppers	19	19	19	23
Romania	**48**	**53**	**72**	**61**
– Cucumbers	18	26	36	33

TRADE BALANCE

FRESH FRUIT AND VEGETABLES, VALUE (million euros)

BULGARIA	2020	2021	2022	2023p
Import	284	343	372	403
Export	104	139	160	168
TRADE BALANCE	**-180**	**-204**	**-212**	**-236**

ROMANIA	2020	2021	2022	2023p
Import	944	1,019	1,131	1,197
Export	94	111	144	139
TRADE BALANCE	**-850**	**-908**	**-987**	**-1,058**

Population 6.7 m

Area 88,400 km²

GDP per Inhabitant 9,070 EUR

GDP Growth 5.2 per cent

Unemployment 5.8 per cent

CPI for Food (2015=100) 128.7

SOUTHEAST EUROPE

SERBIA

This year, Serbian farmers are feeling the effects of the climate crisis to an extreme extent. Last spring the conditions were good, and good fruit yields were forecasted. The heavy rains and floods in May were followed by the heat of July, when temperatures shot up to more than 40°C. In addition, two storms including hail in July hit the Balkans and Serbia. A lot of acreage with agriculture has been damaged. As a result, it hasn't been possible to produce normal-sized fruit crops. First estimates show a sharp decline by 20 per cent compared with previous year, with a downturn in all major fruit crops like apples and stonefruit.

Serbian plums play a big role in the world market. In terms of production, Serbia is the third country in the world, and in terms of exports the fifth country. Last year saw an increase in acreage to 74,000ha. Due to this, a positive export trend on dried plums followed while exports of fresh plums stagnated. Beside this, a great part of the plum crop goes to the distillery industry.

Elsewhere, export-oriented raspberry, blackberry and blueberry crops were hit by the extreme weather. The frozen raspberry market has had its ups and downs in recent years. A few years ago, high prices encouraged many other countries to invest, leading to an increase in raspberry acreage for example in Morocco or Ukraine. Two years ago, it was already predicted that prices would fall, and this happened. Not only has the volume of production increased, but at the same time there has been a fall in demand on the world market. Due to this, stocks of frozen raspberries reached a high level worldwide and the minor Serbian crop had only a small influence, if any, on prices.

Blueberries are the newcomer in Serbia's fruit portfolio. But last year, rains put a 15 per cent dent in its blueberry harvest. Serbia sees further growth potential in the fresh market despite this year's poor results.

Vegetables are also experiencing crop losses, especially outdoor crops. Vegetables are mainly used to supply the domestic market. In recent years, protected vegetable production of tomatoes, peppers, cucumbers, and lettuce has become more popular in Serbia. Self-sufficiency in these crops has recently increased, so the first reaction to this is to reduce imports.

PRODUCTION

VOLUME ('000 tonnes)

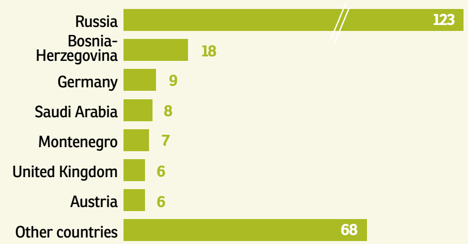
FRESH FRUIT	2020	2021	2022	2023p
Apples	489	513	486	380
Plums	583	413	489	353
Melons	141	145	184	160
Sour cherries	166	155	164	145
Raspberries	119	111	112	99
Pears	67	56	60	72
Apricots	30	31	44	40
Peaches	41	31	32	30
Blackberries	29	31	32	25
Other	130	112	121	120
TOTAL	1,795	1,598	1,761	1,424

FRESH VEGETABLES	2020	2021	2022	2023p
Brassicas	179	185	165	155
Peppers	107	148	144	145
Tomatoes	103	135	148	145
Carrots	53	55	52	50
Leguminous crops	37	33	30	30
Cucumbers	31	29	31	30
Onions	33	37	35	30
Other	36	29	28	25
TOTAL	579	651	619	610

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

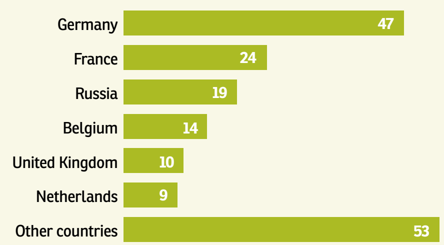
FRESH FRUIT EXPORTS 2022

BY DESTINATION ('000 tonnes)



FROZEN FRUIT EXPORTS 2022

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	96	94	80	75
Oranges	45	44	40	45
Apples	27	21	37	45
Easy peelers	33	35	31	30
Other	106	107	87	110
TOTAL	307	301	275	305

FRESH VEGETABLES	2020	2021	2022	2023p
Tomatoes	33	36	29	30
Brassicas	9	14	14	15
Peppers	10	13	10	10
Other	35	39	36	40
TOTAL	87	102	89	95

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	173	180	148	115
Plums	28	24	25	20
Peaches, Nectarines	24	18	15	10
Cherries	18	12	14	10
Strawberries	9	8	6	5
Other	28	30	37	25
TOTAL	280	272	245	185

FRESH VEGETABLES	2020	2021	2022	2023p
Onions	17	15	26	20
Cucumbers/Gherkins	21	28	18	20
Peppers	14	10	9	10
Tomatoes	5	7	8	10
Brassicas	4	2	4	5
Other	29	24	22	20
TOTAL	90	86	87	85

FROZEN PRODUCTS	2020	2021	2022	2023p
Raspberries	108	98	67	65
Sour cherries	27	31	35	35
Blackberries	38	32	23	20
Other	55	53	51	45
Vegetables	48	48	48	35

TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2020	2021	2022	2023p
Import	269	255	262	280
Export	228	248	268	240
TRADE BALANCE	-41	-7	+6	-40

FRESH VEGETABLES	2020	2021	2022	2023p
Import	76	87	85	90
Export	49	52	51	45
TRADE BALANCE	-27	-35	-34	-45

Population
68.1 m

Area
243,600 km²

GDP per Inhabitant
43,270 EUR

GDP Growth
4.1 per cent

Unemployment
3.6 per cent

CPI for Food
(2015=100)
115.5

UNITED KINGDOM

In 2022, UK agriculture was not only affected by the labour shortage caused by Brexit, but the weather conditions at the time also had a major impact on harvested volumes. While the fruit harvest benefited from warm weather conditions, many vegetable crops suffered on the other hand. Fruit production increased by 13 per cent year on year to 652,000 tonnes in 2022. This was mainly due to the increase in the harvest of apples, strawberries, and blackcurrants, which performed well in the 2022 season. The apple harvest increased by around 9 per cent in 2022 compared with the previous year, strawberry production by 3 per cent and blackcurrants by 15 per cent. By contrast, the vegetable harvest in 2022 was around 6 per cent below the previous year's level at 2.2m tonnes. This was mainly due to the harvest losses for onions (-18 per cent) and leafy vegetables (-11 per cent).

At the beginning of 2023, there were supply shortages of many types of fruit and vegetables in the UK. The shortages were particularly noticeable in the supermarket chains Aldi and Tesco, where the vegetable shelves were empty at times. The reasons for the lack of demand were a combination of Brexit, the war in Ukraine pushing up energy prices (and therefore limiting northern Europe's supply base), and unfavourable weather conditions in the previous year. Brexit caused food prices to rise significantly. Higher prices for customs controls had to be passed on to consumers. The extreme summer of 2022 reduced harvest volumes in many important import countries for the UK, such as Spain and Morocco. Carrots, parsnips, cabbage, and cauliflower were affected, which is why prices rose further in 2023 due to the shortage of supply. In addition, the Russian war against Ukraine drove prices to a peak level. The shortages continued well into March.

In addition to the declining labour supply, Brexit and inflation, the weather was the main limiting factor for fruit and vegetable production in the UK in 2023. The change from a cold spring with little precipitation to a very dry summer reduced the growth of many seedlings. In summer, the rains arrived just in time, but by autumn Storms Agnes, Babet and Ciaran followed and brought persistent rain, which led to flooded fields until December. This hampered the harvest, particularly for vegetable crops such as cauliflower, broccoli, and carrots. As a result, the harvest of these crops is not expected to exceed the previous year's level. In particular, the harvest volumes of cabbage and broccoli will fall short of the previous year's level by an estimated 10 per cent.

In contrast, the spring favoured the development of most fruit crops. Despite the cold snap, the 2023 apple harvest is expected to significantly exceed the previous year's level by almost 17 per cent. The earlier start to the strawberry season also contributed to harvest volumes exceeding the previous year by almost 2 per cent.

PRODUCTION

VOLUME ('000 tonnes)

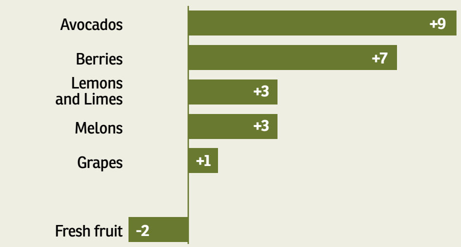
FRESH FRUIT [1]	2020	2021	2022	2023p
Apples	201	189	206	240
Strawberries	123	115	119	122
Pears	25	19	18	17
Raspberries	15	16	16	16
Blackcurrants	16	13	15	15
Plums	8	4	6	6
Cherries	6	4	4	4
Other soft fruit	12	11	10	5
Other	251	206	258	222
TOTAL	657	577	652	647

FRESH VEGETABLES [2]	2020	2021	2022	2023p
Carrots	784	797	798	795
Onions	411	392	319	345
Peas [3]	171	176	161	163
Cabbage	167	151	140	129
Lettuce	109	103	92	89
Turnips/Swedes	95	92	90	88
Mushrooms	93	86	84	83
Cauliflower	101	93	82	78
Parsnips	72	74	72	71
Broccoli	84	78	67	60
Other	243	244	249	235
TOTAL	2,330	2,286	2,154	2,136

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

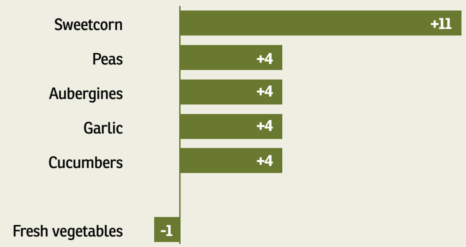
TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2013-2022)



TOP 5 FRESH VEGETABLE IMPORTS

VOLUME GROWTH (% p.a. 2013-2022)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Bananas	1,035	948	885	854
Melons	316	282	301	309
Apples	340	327	322	304
Easy peelers	316	286	293	293
Table grapes	277	269	272	274
Oranges	267	246	252	247
Lemons/Limes	168	147	147	151
Pineapples	135	120	112	109
Pears	107	100	114	107
Other	603	602	579	563
TOTAL	3,564	3,327	3,277	3,212

FRESH VEGETABLES [1]	2020	2021	2022	2023p
Tomatoes	383	335	385	380
Onions	307	296	369	360
Peppers	221	191	218	222
Cucumbers	195	169	201	207
Lettuce	231	202	133	132
Cauliflower/Broccoli	129	103	130	123
Mushrooms	116	106	98	96
Sweetcorn	54	58	57	61
Other	577	518	454	443
TOTAL	2,213	1,978	2,044	2,024

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2020	2021	2022	2023p
Apples	21	11	11	10
Avocados	21	7	8	9
Melons	13	3	1	2
Other	123	16	18	10
TOTAL	178	37	38	31

FRESH VEGETABLES	2020	2021	2022	2023p
Mushrooms	12	9	10	11
Carrots/Turnips	15	8	13	10
Cauliflower/Broccoli	11	6	6	6
Other	70	46	67	65
TOTAL	108	69	96	94

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2020	2021	2022	2023p
Import	4,593	4,341	4,519	4,668
Export	216	73	74	75
TRADE BALANCE	-4,377	-4,268	-4,445	-4,594

FRESH VEGETABLES	2020	2021	2022	2023p
Import	2,968	2,756	3,180	3,261
Export	131	85	99	101
TRADE BALANCE	-2,837	-2,671	-3,081	-3,160

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