



**FRUIT
LOGISTICA**

FRUIT LOGIS TICA

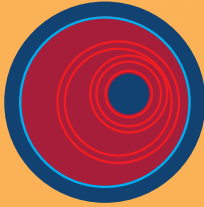
2025
FRUITLOGISTICA.COM

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



**SAVE
WITH EARLY
BIRD RATE**

**REGISTER
NOW**

**FRUITNET BERRY
CONGRESS**

13-14 MARCH 2025

• NEW VENUE •

**AHOY CONVENTION CENTRE
ROTTERDAM**



The leading event for the international berry business

GET INVOLVED TODAY

Contact our team for sponsorship and exhibitor opportunities info@berrycongress.com

berrycongress.com



Organised by **FRUITNET**

Together with **FRUIT LOGISTICA**

Platinum sponsor



Gold sponsors



Silver sponsor



Bronze sponsors



EUROPEAN STATISTICS HANDBOOK



Contents

02	European Union
08	Austria
10	Belgium
12	France
14	Germany
16	Greece
18	Italy
20	Netherlands
22	Nordic countries
	Denmark / Finland / Sweden
24	Poland
26	Portugal
28	Spain
30	SEE – Bulgaria / Croatia
	Hungary / Romania
32	SEE – Serbia
34	United Kingdom

We need to talk about the weather

Fruit and vegetable production is heavily dependent on the weather. The effects of this dependence were seen again in 2024. Extreme conditions continue to occur more frequently and are often severe. Take, for example, the frosts that affected fruit blossoms in Central and Eastern Europe last April, and of course the flooding that hit various countries.

Valencia was hardest hit; the region's flooding, caused by heavy rainfall at the end of October, claimed lives and damaged infrastructure. In most cases, short-term supply disruptions on the European market balance each other out, but the secure procurement of goods will become an increasingly important issue in future.

Extreme weather also favours the emergence of new pests and diseases. For example, the glassy-winged cicada became more prevalent in 2024, an emerging challenge for beet and potato growers. Pests and diseases also make production more difficult, especially when effective crop protection products are no longer available in sufficient quantities. If it is not possible to switch between active substances, the risk of resistance increases. Researchers, breeders, producers and politicians are all under pressure to develop sustainable approaches.

Besides the weather, market conditions also present a challenge. Although inflation has eased, consumer prices continue to rise – in some of the major consuming countries, economic growth has been slow. In the political landscape, the moderate centre is fading and extreme positions gaining ground, while global politics is still peppered with trouble spots and big, unpredictable, and opinionated personalities.



Alexander Stein
Director
FRUIT LOGISTICA
Messe Berlin GmbH



Michael Koch (V.i.S.d.P.)
Director – Horticulture
AMI Agrarmarkt-
Informations-GmbH

© Copyright

Messe Berlin GmbH 2025

Unauthorised publication or reuse is forbidden without the prior written permission of the publisher.

Printed in Germany:
D+L, Schlavenhorst 10,
46395 Bocholt

Publisher

Messe Berlin GmbH
Messedamm 22, 14055 Berlin
fruitlogistica@messe-berlin.de
www.fruitlogistica.com

Production

AMI Agrarmarkt-Informationen-GmbH
Dreizehnmorgenweg 10, 53175 Bonn
info@AMI-informiert.de
www.AMI-informiert.de

In cooperation with:

FRUITNET



Population
449.2 m



Area
4,101,400 km²



GDP per Inhabitant
38,130 EUR



GDP Growth
-0.1 per cent



Unemployment
4.0 per cent



CPI for Food
(2015=100)
126.4

EUROPEAN UNION

2024 was another year with many challenges across Europe. The weather made it difficult to produce fruit and vegetables. Almost all conceivable extremes were experienced over the course of the year. Late frosts in April, heavy rainfall and flooding at different times of the year, but also heatwaves and drought. Storms and hailstorms caused damage not only to crops but also to infrastructure. The most severe were the storms in Valencia, which devastated an entire region at the end of October and claimed lives. There were short-term supply bottlenecks, due to damaged infrastructure and the closure of important transit routes. But the impact on production varied from crop to crop, with persimmons the hardest hit. The long-term consequences are still not fully clear.

National parliamentary votes in the past couple of years have already brought more extreme political

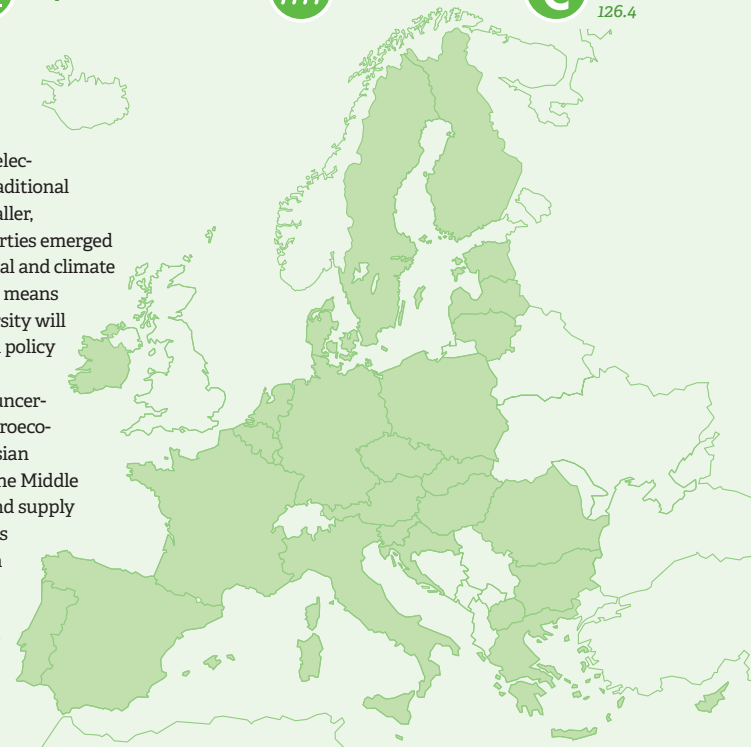
views into play. The European Parliament elections in June 2024 confirmed this trend. Traditional parties lost influence, while previously smaller, populist and, in some cases, Eurosceptic parties emerged stronger. Parties dedicated to environmental and climate issues also gained seats in parliament. This means debates around sustainability and biodiversity will play a greater role in European agricultural policy in the future.

Geopolitical events continue to create uncertainty for the short and medium-term macroeconomic outlook. As well as the ongoing Russian invasion of Ukraine, a regional conflict in the Middle East has had an impact on energy prices and supply routes. And there are risks of trade disputes between major economic blocs – notably in North America. Under the current conditions, the European Commission forecasts average economic growth of around 1.4 per cent per year for the coming years.

The surge in inflation observed in the EU since the end of 2021 has normalised over the course of 2024. Energy prices have fallen thanks to lower global demand for oil, adequate diversification of supply, and sufficient stocks of natural gas in the EU. But that price pressure does not affect all EU countries equally. From January to November, the harmonised consumer price index in the EU was on average 2.6 per cent higher than in the previous year. Consumer prices rose the most in Romania, Belgium and Croatia. In contrast, the rise in consumer prices was significantly below average in Lithuania, Finland, and Italy. Overall, the index stood at 130 points in November, three points higher than the year before. Fresh fruit made an above-average contribution to inflation, with the price index for the EU at 148 points, four points higher than in November 2023. Vegetables also became even more expensive across the EU. The price index was 151 points in November, six points up on the year.

Following the steep rise in the cost of operating resources, especially fertilisers, caused by the war in Ukraine, the situation for production companies in Europe eased slightly in 2024. The price index for agricultural inputs fell by nine points to 131 (in 2020 it was 100). Fertilisers were significantly cheaper again, but prices for crop protection products also dropped slightly. On

Continued on page 4



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples	11,989	11,936	11,511	10,207
Oranges	6,586	5,881	5,721	6,186
Watermelons	3,146	2,686	2,779	2,724
Easy peelers	3,165	2,956	3,009	2,708
Peaches	2,160	2,299	2,202	2,257
Pears	1,750	2,028	1,707	1,790
Melons	1,807	1,624	1,807	1,735
Table grapes	1,720	1,676	1,420	1,480
Nectarines	907	961	1,097	1,113
Other	9,887	10,284	9,959	10,762
TOTAL	43,117	42,330	41,212	40,962

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Onions, dry	7,183	6,234	6,475	7,311
Tomatoes ²	6,843	6,217	6,091	6,176
Carrots	5,246	4,413	4,383	4,514
Peppers	3,200	3,110	2,840	3,124
Cabbage	3,025	2,694	2,670	2,510
Cucumbers	2,533	2,412	2,402	2,498
Lettuce	2,444	2,273	2,173	2,108
Cauliflower	2,160	1,969	1,925	1,983
Courgettes	1,698	1,596	1,560	1,600
Other	15,465	13,950	15,053	14,735
TOTAL	49,796	44,868	45,571	46,559

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

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

PRODUCTION

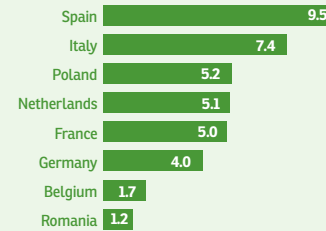
VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Spain	14,007	11,958	12,099	13,193
Italy	9,875	10,732	10,407	10,600
Poland	5,060	5,363	4,924	4,076
France	2,694	3,014	3,154	3,058
Greece	3,029	3,429	3,045	3,235
Romania	2,106	1,674	1,656	1,490
Germany	1,301	1,384	1,241	1,047
Portugal	1,506	1,323	1,300	1,342
Hungary	841	678	816	644
Netherlands	726	736	696	636
Belgium	664	649	648	475
Bulgaria	382	343	308	369
Austria	188	237	191	145
Croatia	151	155	163	147
Cyprus	102	96	94	99
Slovenia	51	67	59	62
Lithuania	51	67	50	59
Denmark	49	61	43	53
Sweden	52	50	51	51
Czechia	141	162	128	45
Slovakia	44	42	38	39
Ireland	23	31	29	27
Other EU	77	80	73	69
TOTAL	43,117	42,330	41,212	40,962

FRESH VEGETABLES ³	2021	2022	2023	2024p
Spain	10,430	9,593	9,497	10,088
Italy	6,966	6,400	7,414	7,180
Netherlands	5,695	4,959	5,066	5,392
France	5,642	5,132	4,986	5,201
Poland	5,369	5,443	5,165	5,163
Germany	4,339	3,846	4,016	3,961
Belgium	2,007	1,661	1,655	1,638
Romania	1,941	1,255	1,198	1,258
Greece	1,602	1,291	1,072	1,242
Hungary	1,260	1,120	1,300	1,222
Portugal	1,237	984	1,100	1,022
Austria	675	674	651	668
Sweden	409	385	369	395
Bulgaria	332	318	330	313
Czechia	275	246	282	301
Finland	279	286	266	295
Lithuania	238	256	211	236
Denmark	265	245	239	225
Ireland	231	222	210	223
Slovakia	142	130	139	145
Croatia	140	131	128	96
Slovenia	114	90	74	81
Other EU	208	201	204	214
TOTAL	49,796	44,868	45,571	46,559

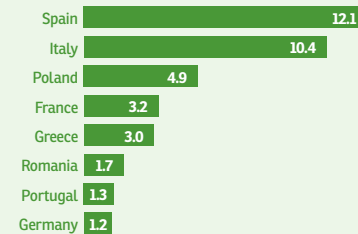
TOP 8 VEGETABLE PRODUCERS 2023³

(million tonnes)



TOP 8 FRUIT PRODUCERS 2023

(million tonnes)



EUROPEAN UNION

the other hand, the cost increase has only just filtered through to other areas. These include vehicles and machinery as well as building construction and maintenance. Labour costs also continue to rise. However, it

IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	3,334	3,196	3,233	2,916
Apples	1,910	1,782	1,773	1,662
Oranges	1,715	1,763	1,634	1,519
Watermelons	1,377	1,223	1,326	1,373
Easy peelers	1,460	1,393	1,293	1,307
Table grapes	941	983	925	886
Lemons	861	790	781	756
Pears	739	722	727	653
Avocados	542	582	621	600
Other	5,020	4,857	4,867	4,649
TOTAL	17,899	17,291	17,179	16,320

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes	2,048	1,969	2,051	2,040
Cucumbers	1,140	1,117	1,249	1,177
Onions	1,232	1,218	1,178	1,166
Lettuce	1,118	1,126	1,133	1,081
Peppers	1,114	1,074	1,035	1,026
Carrots	989	900	912	940
Cauliflower	440	457	421	440
Courgettes	429	387	423	392
Mushrooms	322	295	294	272
Other	2,973	2,906	3,015	2,726
TOTAL	11,804	11,449	11,711	11,261

EXPORTS – INTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	3,127	2,997	3,047	2,765
Oranges	1,999	2,000	1,857	1,721
Apples	1,847	1,685	1,724	1,612
Easy peelers	1,523	1,455	1,355	1,384
Other	9,849	9,204	9,087	8,848
TOTAL	18,346	17,341	17,070	16,331

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes	2,143	2,174	2,200	2,176
Onions	1,146	1,185	1,285	1,259
Lettuce	1,255	1,189	1,196	1,187
Peppers	1,171	1,112	1,086	1,067
Other	6,461	6,152	6,339	6,024
TOTAL	12,176	11,812	12,106	11,714

was not possible for farms to achieve higher prices for fresh produce over the entire season. Without looking at individual types of fruit, the producer price index for fruit rose by ten points to 125 points in 2024. The effect is probably due mostly to the smaller apple harvest. In contrast, the producer price index for vegetables fell by seven points year-on-year to 136 points. This trend had already become apparent over the course of the season.

Despite the unfavourable weather conditions over the course of the year, the 2024 fruit harvest in the EU is estimated to be only slightly lower than in the previous year. At a total of 40.96mn tonnes, only 1 per cent less fruit was harvested. However, developments varied for the individual types of fruit. The apple harvest was a good 11 per cent lower than in the previous year. In several countries, the blossom was damaged by frosts in spring. Eastern Europe was particularly affected. The harvest of easy peelers also fell by 10 per cent compared to the previous year. The warm winter of 2023/24 was not good for plant development. Further losses resulted from the flooding in the Valencia region. According to initial estimates, the losses for oranges were not as severe. In fact, the harvest volume was estimated to be 8 per cent higher than in 2023, although that year's crop was also particularly low. Stonefruit, such as peaches and nectarines, were also harvested in larger quantities again.

The vegetable harvest was 2 per cent higher than in the previous year. Onions and peppers were the main drivers here. After prices rose in 2023/24, some countries expanded their onion production significantly. Despite difficult weather conditions, yields also rose, which meant the harvest was an estimated 13 per cent higher than in 2023. A 10 per cent increase in peppers represents a recovery from the previous year's sharp decline. In contrast, fine cabbage vegetables and lettuces suffered particularly at times due to extreme weather. Harvest volumes here fell short of the previous year.

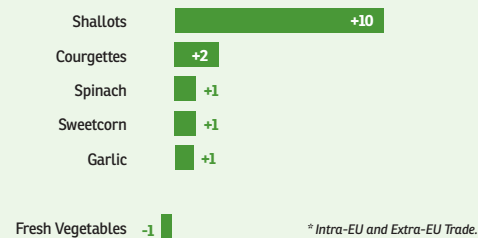
In its Agricultural Outlook Report 2024, the EU Commission forecasts a decline in tomato production due to a reduction in winter cultivation and a switch to small-fruited varieties. These generally achieve higher prices and therefore more added value. However, high consumer prices in the past two years have encouraged

Continued on page 6



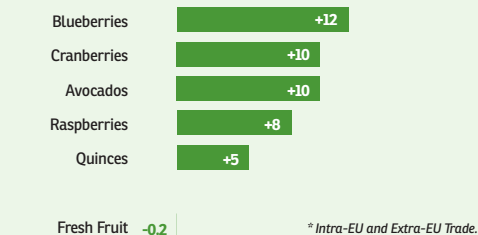
TOP 5 FRESH VEGETABLE IMPORTS*

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



TOP 5 FRESH FRUIT IMPORTS*

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



IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	5,260	5,087	5,241	5,405
Oranges	900	735	986	980
Pineapples	827	778	783	801
Avocados	679	677	759	781
Table grapes	577	614	585	585
Easy peelers	456	407	506	465
Watermelons	424	510	496	405
Lemons	407	467	444	364
Apples	344	275	233	279
Other	2,313	2,210	2,142	2,322
TOTAL	12,188	11,761	12,176	12,386

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes	705	795	804	818
Onions	292	211	447	330
Peppers	241	232	268	285
Carrots	69	64	128	113
Cucumbers	126	106	101	106
Courgettes	63	73	70	68
Mushrooms	29	30	27	26
Lettuce	14	14	25	19
Cauliflower	9	6	13	15
Other	587	536	542	585
TOTAL	2,137	2,067	2,423	2,364

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples	1,141	1,097	1,011	971
Easy peelers	313	323	292	312
Oranges	376	384	314	303
Avocados	93	95	104	114
Other	1,867	1,772	1,745	1,698
TOTAL	3,790	3,672	3,467	3,397

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Onions	1,233	1,343	994	1,202
Tomatoes	378	357	347	366
Peppers	289	300	284	292
Lettuce	245	239	228	192
Other	1,307	1,266	1,210	1,160
TOTAL	3,453	3,504	3,064	3,211

1) Excluding potatoes.

Sources: AMI-Informiert.de; Eurostat

EUROPEAN UNION

consumers generally to favour traditional, large-fruited tomatoes again. It remains to be seen whether, and to what extent, production will adjust accordingly. A decline in the harvest volume of peaches and nectarines is also forecast in the next few years, as cultivation areas

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Germany	5,495	5,214	5,330	5,412
Netherlands	5,664	5,572	5,309	5,411
France	3,643	3,519	3,450	3,437
Spain	2,020	2,160	1,818	2,071
Italy	1,986	1,874	1,964	2,040
Belgium	2,194	2,058	2,025	2,002
Poland	1,716	1,569	1,646	1,706
Portugal	893	871	882	881
Romania	830	852	872	870
Austria	655	672	775	809
Sweden	670	654	610	620
Other	4,321	4,037	4,673	3,448
TOTAL	30,087	29,052	29,355	28,706

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Spain	7,679	6,685	6,900	6,694
Netherlands	4,446	4,243	4,311	4,242
Italy	2,620	2,533	2,391	2,625
Belgium	1,939	1,801	1,718	1,754
Greece	1,258	1,284	1,381	1,342
Poland	1,293	1,045	1,106	1,111
France	919	1,026	1,004	949
Germany	640	593	619	579
Portugal	500	624	505	496
Austria	178	155	181	174
Slovenia	200	177	158	145
Other	464	849	263	467
TOTAL	22,136	21,014	20,537	20,577

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	33,945	35,523	39,084	38,830
Export	26,549	27,250	29,285	28,412
TRADE BALANCE	-7,396	-8,273	-9,799	-10,419

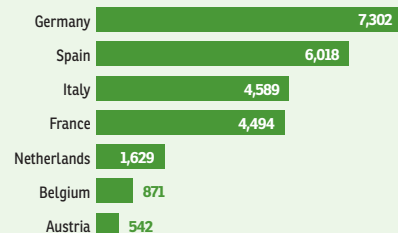
have been reduced. However, this will be partially offset by higher yields. This is also the case for apples, where a stable harvest volume of 11.4mn tonnes per year is expected. Higher yields from new varieties and improved production methods will compensate for the restrictions on acreage.

Consumption of fresh fruit and vegetables in the EU is expected to remain stable or increase by 2035 compared with the 2020-24 average, as consumers – encouraged by public promotion initiatives – become even more aware of the benefits of a fruit and vegetable-rich diet. However, there are significant differences between sectors and countries. By 2035, EU consumption of fresh oranges will increase to 13.3kg per capita. In the same period, fresh apple demand is expected to increase to 14.7kg per capita (+0.4 per cent per year), driven by new varieties that better match consumer preferences. In contrast, consumption of fresh peaches and nectarines is expected to remain relatively stable at around 6.1kg per capita. Ten years from now, per-capita consumption of fresh tomatoes should be stable at 15.2kg, but demand for average-sized tomatoes will be replaced by higher sales of snacking types.



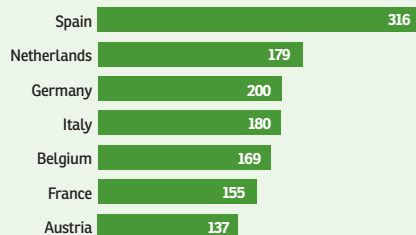
HOUSEHOLD DEMAND 2023¹

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



HOUSEHOLD DEMAND 2023¹

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



IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Germany	3,564	3,202	3,340	3,371
France	1,954	1,923	1,884	1,941
Netherlands	1,584	1,431	1,569	1,610
Belgium	1,153	1,066	1,074	1,011
Poland	784	902	906	959
Italy	638	682	697	775
Spain	645	749	665	742
Czechia	457	458	428	452
Romania	389	387	420	445
Austria	332	324	389	396
Sweden	348	358	343	355
Other	2,043	2,057	2,419	1,569
TOTAL	13,941	13,516	14,134	13,625

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Spain	5,421	4,983	5,097	5,183
Netherlands	5,011	4,971	4,753	4,994
France	1,027	1,115	1,124	1,057
Italy	911	831	888	965
Poland	734	878	792	788
Belgium	897	804	776	741
Portugal	279	328	422	455
Germany	442	417	473	437
Austria	192	200	234	213
Greece	158	150	180	181
Hungary	94	88	111	105
Other	463	552	320	125
TOTAL	15,629	15,317	15,170	15,245

TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Import	17,098	18,530	21,492	19,618
Export	18,528	19,838	22,471	20,340
TRADE BALANCE	+1,430	+1,308	+979	+722

1) Excluding potatoes.

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



Population
9.2 m



Area
82,500 km²



GDP per Inhabitant
51,830 EUR



GDP Growth
-1.8 per cent



Unemployment
3.5 per cent



CPI for Food
(2015=100)
130.4

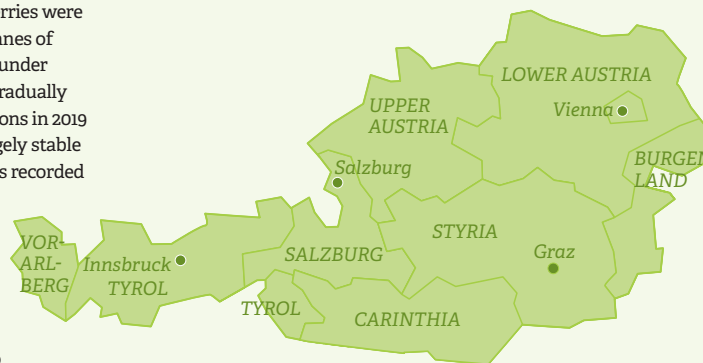
AUSTRIA

Weather conditions had a significant impact on the fruit and vegetable harvest in Austria in 2024. In the case of apples and pears, late frosts in Styria led to massive crop failures. In addition, heavy regional rainfall in summer and autumn, which led to flooding, had a negative impact on fruit production. According to Statistics Austria, Austria's fruit harvest, excluding elderberries and chokeberries, was the second smallest in 20 years at 145,400 tonnes. Only in 2016 was less fruit harvested. The country produced a total of 114,900 tonnes of apples and pears, 29 per cent less than in the previous year. Apples are a major feature of the overall fruit harvest. As only a small part of the growing area is equipped with frost protection irrigation, the late frosts caused severe damage. The frosts in 2023 had already caused damage to pears. The yields for these were now slightly higher. Due to the high temperatures in summer, the fruit harvest began exceptionally early for almost all types of fruit.

Above-average quantities of berries and soft fruit, which were less affected by unfavourable weather conditions, were harvested. A total of 18,600 tonnes of berries were harvested (+3 per cent), and around 11,500 tonnes of stonefruit (+42 per cent). Since 2019, the area under commercial fruit cultivation in Austria has gradually but continuously declined. Stronger restrictions in 2019 and 2020 were followed by three years of largely stable acreage, before the largest decline to date was recorded in 2024 with a decrease of 2.5 per cent. At a total of 10,183ha, the fruit-growing area was the smallest in ten years.

Despite the adverse weather conditions, 3 per cent more open-field vegetables were harvested in Austria in 2024 than in 2023 on a stable cultivation area compared to the previous year. According to Statistics Austria, a total of 667,700 tonnes were harvested, exceeding the five-year average by 2 per cent. The season was characterised by heat and drought, as well as periods of severe weather with heavy rain and flooding, which led to quality losses due to increased fungal and pest pressure. The early start of vegetation this year led to favourable production conditions for numerous types of vegetables and an early start to the season. At 169,300 tonnes, production of fruiting vegetables increased by 3 per cent this year. Despite the adverse weather conditions, production of cabbage, leafy and stem vegetables remained stable compared to the previous year, with a harvest volume of 137,300 tonnes. Pulses, root vegetables, and onions were grown on just under 11,200ha. With a harvest volume of 361,300 tonnes, an increase of 3 per cent was achieved compared to the previous year. Compared with the five-year average, 5 per cent more pulses, root vegetables, and onions were produced. Nevertheless, the wet weather led to numerous sorting losses for onions, although a significant increase in yield noticeably increased the gross harvest volume.

As in other European countries, industrial weakness and consumer restraint are dampening growth prospects in Austria. Investments are suffering from an increase in financing costs and negative sales expectations. At the same time, consumer uncertainty is high, with the result that private consumption has fallen despite strong real income growth. The Austrian National Bank is forecasting an inflation rate of 2.9 per cent for 2024 (half of the previous year's rate of 7.7 per cent).



PRODUCTION

VOLUME ('000 tonnes)

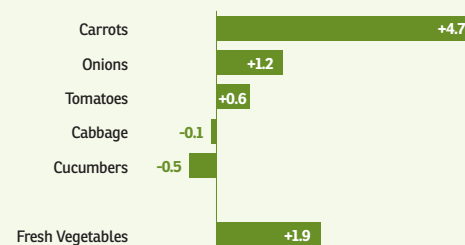
FRESH FRUIT ¹	2021	2022	2023	2024p
Apples	152	191	156	104
Strawberries	14	17	15	14
Pears	8	12	7	10
Apricots	4	5	4	5
Currants	3	3	2	2
Blueberries	2	2	2	2
Sweet cherries	1	2	2	2
Plums	2	2	1	2
Peaches	1	2	1	2
Other	1	1	1	2
TOTAL	188	237	191	145

FRESH VEGETABLES ^{1,2}	2021	2022	2023	2024p
Onions	169	175	160	175
Carrots	118	118	121	121
Tomatoes	60	57	57	58
Cucumbers	48	44	43	43
Red/white cabbage	41	46	39	36
Iceberg lettuce	23	22	25	22
Sweetcorn	15	19	19	17
Peppers	15	13	13	14
Celeriac	14	15	13	13
Other	172	165	161	169
TOTAL	675	674	651	668

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

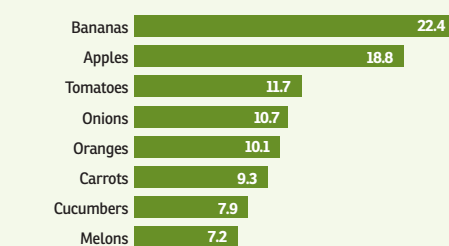
TOP 5 PRODUCTION OF FRESH VEGETABLES

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



TOP 8 FRUIT AND VEGETABLES 2023

HOUSEHOLD PURCHASES (kg)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	141	153	149	145
Watermelons	38	43	58	67
Oranges	56	53	59	60
Table grapes	42	38	35	42
Easy peelers	37	37	38	40
Lemons	34	34	37	40
Apples	22	15	36	28
Pears	16	19	20	22
Other	268	280	343	366
TOTAL	655	672	775	809

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes	51	63	86	76
Peppers	59	59	66	67
Lettuce	35	37	43	44
Cucumbers/Gherkins	34	30	33	33
Courgettes	20	19	20	21
Mushrooms	13	11	14	14
Onions	12	8	10	13
Kohlrabi, Savoy	15	9	11	11
Other	92	88	106	117
TOTAL	332	324	389	396

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples incl. cider	52	42	50	34
Sweet cherries	21	13	23	25
Bananas	8	8	6	13
Table grapes	12	9	6	10
Other	85	84	96	93
TOTAL	178	155	181	174

FRESH VEGETABLES	2021	2022	2023	2024p
Onions	66	76	76	82
Peppers	31	32	37	36
Tomatoes	19	30	48	34
Carrots	15	13	14	12
Cucumbers/Gherkins	15	17	13	10
Other	45	31	46	39
TOTAL	192	200	234	213

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	913	955	1,166	1,284
Export	281	244	315	337
TRADE BALANCE	-631	-711	-850	-947

FRESH VEGETABLES	2021	2022	2023	2024p
Import	538	609	757	771
Export	158	210	295	259
TRADE BALANCE	-380	-399	-462	-512



Population
11.8 m



Area
30,500 km²



GDP per Inhabitant
50,660 EUR



GDP Growth
0.5 per cent



Unemployment
3.4 per cent



CPI for Food
(2015=100)
126.1

BELGIUM

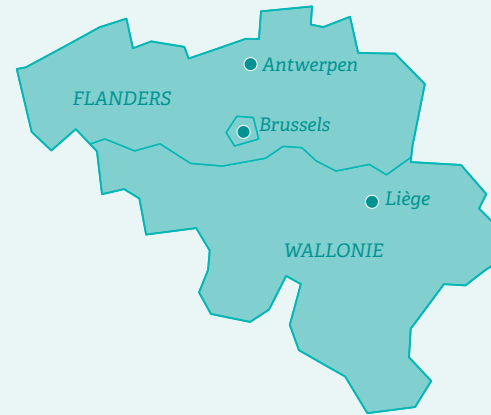
Late frosts and hail had a major impact on the size of the apple and pear harvest in Belgium in 2024. By the end of April, insurance companies had already received numerous and significantly more damage reports than in previous years. The harvest forecast was then finalised at Prognosfruit in August. Belgium expects a below-average harvest volume for both apples and pears in 2024/25. Around 133,000 tonnes of apples are predicted, a good third less than the five-year average. It is not just the weather that is responsible for the decline in volume but also a downturn in planted area. Between 2019/20 and 2024/25, this decreased by around 1,300ha to 4,500ha. The area trend for pears is different, with a slight increase of 100ha to 10,735ha in 2024. However, lower yields had an impact on the pear harvest volume, which at 280,000 tonnes was 27 per cent lower than in the previous season. This is a bitter setback for the Belgian fruit sector after the previous strong harvest years. Nevertheless, Belgium ranks third behind Italy and the Netherlands in the list of leading European pear producers this season.

Alongside apples and pears, strawberries play a key role in the Belgian fruit industry. However, their cultiva-

tion area has also declined of late. Most recently, they grew on just 1,400ha, which is 500ha below the peak. Early March saw the start of the season at BelOrta, the leading producer and sales cooperative for strawberries. Around 10,000 tonnes of strawberries are sold there every year. Most of the fruit is grown on substrate, with only a third grown in the open. Varieties that grow well include Sonata, Elsanta, Sonsation, Portola, Malling Centenary and Elegance.

Vegetable production in Belgium is strongly orientated towards the processing sector. There is a strong tradition for vegetables in Flanders, especially in the areas around Mechelen and Roeselare. Although Belgian horticulture only accounts for 5 per cent of the total cultivated area, according to Statbel, the Belgian statistics office, it accounts for a fifth of the production value of the agricultural sector. However, outdoor vegetable cultivation for the fresh market and the processing industry was characterised by a significant decline in area in 2022 and 2023. For the first time, the vegetable area fell just short of the mark of 50,000ha in 2023. The leading vegetable crops in cultivation are peas, leeks, chicory roots and carrots. The fact that the area under cultivation was reduced so much in 2022 is mainly due to the rise in costs and low prices in contract farming. Labour-intensive vegetable crops such as cauliflower, Brussels sprouts and leeks have suffered the most. But structural change is also making itself felt. Fewer and fewer farms are involved in the cultivation of open-field vegetables. In contrast, the area under protected cultivation has remained constant in recent years at between 2,100 and 2,300ha. Tomatoes and lettuce account for a large proportion of this area.

In mid-December 2024, Statbel presented an initial estimate of the income development of farmers in Belgium for the year 2024. The abundant rainfall had a significant impact on the sowing and yields of most field crops. As a result, price increases were unable to compensate for the loss of income. The production value of vegetables in the 2023/24 season could be 9 per cent higher than in the previous year due to higher producer prices, although the harvest volume is expected to decrease slightly by 1 per cent. In contrast, the production value of fruit is expected to fall by 17 per cent, as the harvest volume is also down 24 per cent on the previous year. Higher producer prices can only partially offset the loss.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Pears	356	346	381	280
Apples	250	239	203	133
Strawberries	49	49	51	50
Other	9	15	13	12
TOTAL	664	649	648	475

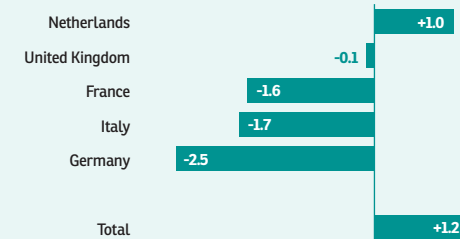
FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes	283	299	290	295
Leeks	127	105	111	109
Carrots	100	66	60	74
Cucumbers	32	35	40	36
Peppers	27	35	31	33
Lettuce	32	31	30	31
Witloof chicory	33	28	29	29
Celeriac	16	15	16	15
Courgettes	11	13	13	12
Other ²	1,346	1,034	1,035	1,004
TOTAL	2,007	1,661	1,655	1,638

1) Excluding potatoes, open field and under glass.

2) Including products cultivated for processing.

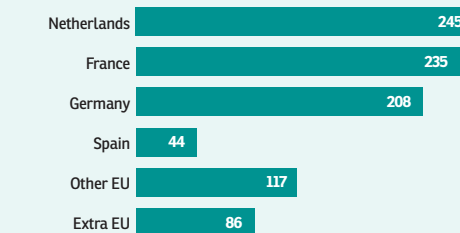
TOP 5 FROZEN VEGETABLE EXPORTS

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



FRESH VEGETABLE EXPORTS 2023

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VBT

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Exotics	1,601	1,487	1,448	1,441
Citrus	231	220	229	204
Apples	91	72	59	63
Pears	41	41	57	59
Other	231	237	233	235
TOTAL	2,194	2,058	2,025	2,002

FRESH VEGETABLES	2021	2022	2023	2024p
Carrots/Turnips	250	237	224	258
Onions/Shallots	115	115	112	108
Green beans	114	94	100	88
Cucumbers	66	61	81	79
Peas	142	91	96	69
Tomatoes	58	74	77	59
Peppers	53	55	54	50
Other	355	338	330	300
TOTAL	1,153	1,066	1,074	1,011

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Exotics	1,314	1,182	1,107	1,130
Pears	359	314	325	355
Apples	120	141	127	124
Strawberries	39	38	36	37
Other	108	126	123	108
TOTAL	1,939	1,801	1,718	1,754

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes	231	209	207	203
Carrots/Turnips	199	156	129	128
Leeks	64	63	63	62
Onions/Shallots	38	55	56	54
Cucumbers	49	43	59	49
Peppers	38	39	43	41
Celeriac	20	21	17	16
Witloof chicory	20	15	14	12
Other	259	224	205	192
TOTAL	897	804	776	741

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	2,406	2,201	2,195	2,352
Export	2,037	2,189	2,134	2,267
TRADE BALANCE	-369	-12	-61	-85

FRESH VEGETABLES	2021	2022	2023	2024p
Import	903	942	1,085	1,023
Export	868	873	951	900
TRADE BALANCE	-35	-69	-134	-123



Population
68.4 m



Area
633,900 km²



GDP per Inhabitant
41,330 EUR



GDP Growth
0.6vper cent



Unemployment
4.7 per cent



CPI for Food
(2015=100)
120.5

FRANCE

Last year was another challenging one for French agriculture. In spring, farmers protested low prices for their products, rising production costs, and the impact of trade agreements. In addition, the changeable weather conditions once again made it difficult to grow fruit and vegetables.

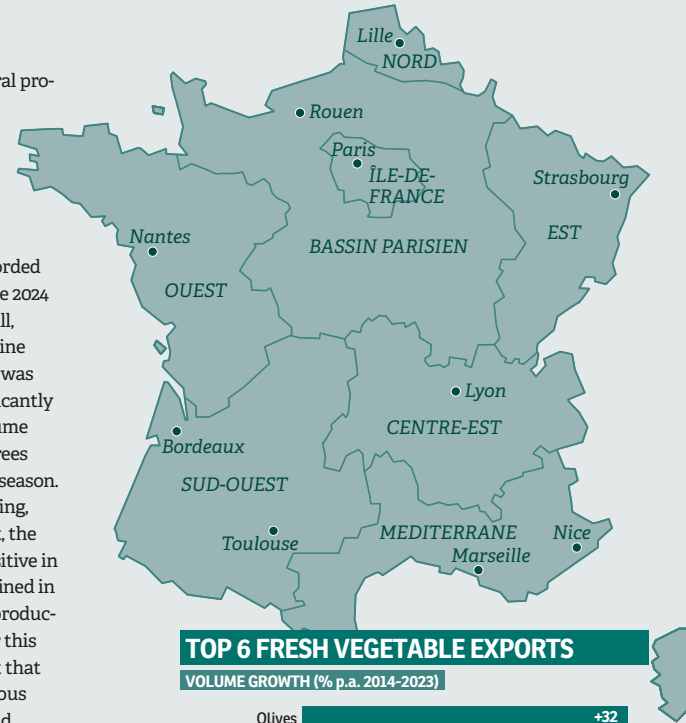
In France, as well as in Spain, the Netherlands, and Germany, there were road blockades in the spring due to farmers' protests, which hindered the movement of goods and led to delays in the supply chain. This had an impact on various sectors, particularly food supplies and logistics. In France, the Council of State repealed a decree on the plastic packaging law, which was originally intended to restrict the use of plastic packaging for fruit and vegetables in supermarkets from 2022.

2024 was characterised by changeable weather,

which mostly had a negative impact on agricultural production. A wet spring and a cool first half of the summer led to harvest delays and lower yields for various crops. The lack of sunshine during the vegetation period partially affected ripening and growth and led to a production shortfall for some crops.

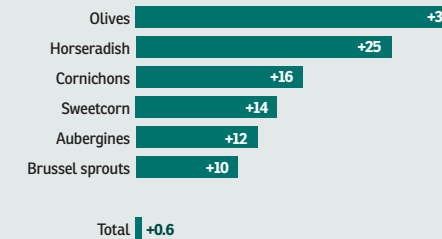
This applies to melons. Lower yields were recorded in all French growing regions this year. Overall, the 2024 season was characterised by a production shortfall, as fruit ripening was delayed by the lack of sunshine and the wet spring. The apricot harvest in France was completed at the beginning of August 2024, significantly earlier than in 2023. However, the production volume was below average due to the alternation of the trees and unfavourable weather conditions during the season. In addition, there were frost events during flowering, hail, and particularly heavy fruit drop. In contrast, the strawberry season in 2024 in France was quite positive in retrospect, despite some fears. Peach acreage declined in all relevant growing regions in France. However, production volumes increased slightly. The mild weather this year also led to early peach blossom, which meant that fruit development began earlier than in the previous year and the harvest could start earlier. Apples and pears in France developed differently this season than last year. French pear production will be significantly higher this year than last year. Due to ageing effects, the significant increase in the volume of summer pears is contributing to this increase. Apple production, on the other hand, suffered from the frosts during the flowering period, although not as much as in the rest of Europe. Hail, heavy pest infestation, and disease pressure further reduced the apple harvest regionally.

Vegetable production also showed a mixed picture. For tomatoes and lettuce, the cool and wet weather initially delayed production, but the weather in the summer months then led to high production. In the 2024/25 season, France expects a larger harvest of chicory roots and chicory sprouts due to the expansion of acreage. Despite declining acreage for carrots and cucumbers, France also expects a bigger harvest in 2024, than in 2023. In the case of onions, both sowing and growth, as well as harvesting and storage, were hampered by heavy rainfall. Not only were the areas under cultivation reduced, but the harvest volume of onions was also significantly lower in 2024.



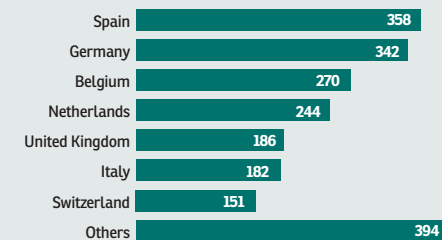
TOP 6 FRESH VEGETABLE EXPORTS

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



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2023)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	748	768	811	799
Clementines	365	352	332	341
Watermelons	254	259	271	201
Avocados	182	201	192	199
Navel Oranges	210	225	192	193
Apples	219	140	138	152
Pineapples	143	146	143	143
Others	1,521	1,427	1,372	1,408
TOTAL	3,643	3,519	3,450	3,437

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes	516	569	530	587
Sweet peppers	170	165	166	177
Courgettes	149	136	146	144
Carrots	158	134	142	144
Onions	126	110	126	118
Cucumbers	65	72	73	71
Others	770	737	702	699
TOTAL	1,954	1,923	1,884	1,941

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples	303	333	304	311
Bananas	221	236	233	206
Watermelons	70	76	89	52
Avocados	32	41	38	45
Melons	34	34	35	32
Others	259	306	306	303
TOTAL	919	1,026	1,004	949

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes	277	325	319	323
Beans	125	109	114	112
Onions	74	126	96	97
Cauliflower ³	102	105	112	88
Sweet Peppers	47	47	56	60
Carrots	59	55	57	58
Other	344	347	369	319
TOTAL	1,027	1,115	1,124	1,057

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	4,363	4,548	4,912	4,906
Export	1,165	1,337	1,416	1,469
TRADE BALANCE	-3,199	-3,211	-3,496	-3,437

FRESH VEGETABLES	2021	2022	2023	2024p
Import	2,389	2,721	3,068	2,943
Export	1,179	1,352	1,652	1,468
TRADE BALANCE	-1,210	-1,369	-1,416	-1,476

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2021	2022	2023	2024p
Apples	1,383	1,391	1,508	1,463
Melons	271	308	323	300
Bananas	277	277	260	250
Plums ²	106	100	208	205
Pears	58	147	105	119
Peaches	86	119	112	118
Nectarines	78	110	112	115
Apricots	47	123	126	88
Strawberries	74	78	74	77
Kiwifruit	45	45	50	45
Other	269	316	276	277
TOTAL	2,694	3,014	3,154	3,058

FRESH VEGETABLES	2021	2022	2023	2024p
Carrots	691	619	653	718
Tomatoes	727	695	656	689
Onions	580	511	615	526
Sweetcorn	462	413	459	471
Green beans	425	378	315	364
Peas	314	295	266	276
Cauliflower	239	226	193	218
Leeks	180	154	168	164
Lettuce	184	174	160	162
Witloof chicory	158	122	108	140
Other	1,682	1,545	1,393	1,473
TOTAL	5,642	5,132	4,986	5,201

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



Population
83.4 m



Area
353,300 km²



GDP per Inhabitant
49,520 EUR



GDP Growth
-1.1 per cent



Unemployment
2.2 per cent



CPI for Food
(2015=100)
125.9

GERMANY

The conditions for fruit and vegetable production in Germany were difficult in 2024. It rained extensively in the winter of 2023/24, meaning that many areas were too wet at the start of 2024. This delayed soil cultivation, sowing, and planting. Longer periods of rain and regional heavy rainfall repeatedly led to delays and failures as the season progressed. In view of the high humidity and high temperatures, the disease pressure was very high at times. Salads and leafy vegetables were particularly affected. Due to the wet soil, early cultivation sets had only formed little root mass. This led to problems during the subsequent dry phases. The late cultivation sets of autumn and storage vegetables benefited from good water supply and achieved high yields. However, some were stored in unfavourable weather conditions, so that the subsequent storage and sorting losses were estimated to be high.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2021	2022	2023	2024p
Apples	1,005	1,071	941	788
Strawberries	131	133	131	108
Pears	37	36	38	38
Plums	40	47	44	37
Sweet cherries	27	38	32	31
Blueberries	16	15	15	14
Sour cherries	11	10	8	7
Currants	14	14	13	6
Mirabelle plums	5	5	6	5
Other	16	14	14	13
TOTAL	1,301	1,384	1,241	1,047

FRESH VEGETABLES ^{2,3}	2021	2022	2023	2024p
Carrots	962	780	797	785
Onions	664	578	666	670
White cabbage	435	385	399	390
Gherkins	171	169	194	190
Iceberg lettuce	131	139	121	115
Red cabbage	142	112	119	115
Asparagus	119	110	112	105
Tomatoes	99	102	101	100
Beetroot	110	94	104	98
Other	1,506	1,376	1,404	1,393
TOTAL	4,339	3,846	4,016	3,961

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

Sources: AMI-informiert.de; Destatis; Eurostat

April 2024 was decisive for fruit cultivation. Due to high temperatures in March, vegetation and flowering were already well developed. Several nights of frost in April led to considerable damage to the blossoms, especially in eastern Germany. In addition, the insect flight during flowering was weak, so that pollination and thus fruit set were not optimal. Rainfall during the harvest led to further losses. Under these difficult conditions, the fruit harvest in Germany in 2024 was one of the smallest in the past ten years. The harvest volumes for apples were lower than in previous years.

The impact on vegetables, purely in terms of quantity, was not as significant. The vegetable harvest in Germany in 2024 was only slightly lower than in the previous year. A slight increase in the area under vegetable cultivation is mainly due to onions, which achieved high prices in the 2023/24 season and were therefore attractive for producers. Rising production costs remain a challenge for farms in Germany. Fertilisers have become cheaper again, but prices for other inputs have continued to rise. The cost of labour is also continuing to rise, and the shortage of labour is becoming increasingly apparent. However, the increased production costs could only be offset to a limited extent by higher producer prices. In view of the limited supply, higher producer prices than in the previous year were achieved at times, but not throughout the entire season and not for all types of fruit and vegetables.

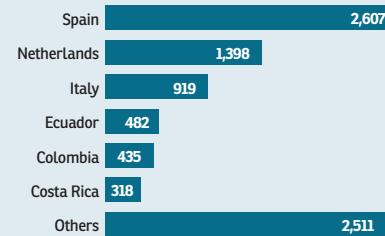
Germany is the most important importer of fresh fruit and vegetables in the EU27. According to preliminary figures, imports rose slightly again in 2024. In the case of fruit, the increase is attributable to apples, where demand was greater due to two smaller harvests. In addition, more mangoes and avocados were imported, which were more readily available in key countries of origin. Vegetables were dominated by tomatoes, cucumbers, and peppers, all of which were imported in larger quantities in 2024.

Consumers in Germany continue to face high living costs. Although inflation has eased, the cost-of-living index was still higher than in the previous year. Fruit and vegetables also contributed to the rise in the cost of living at times. Apart from the development of consumer prices, consumers are unsettled by the uncertain political situation at home and abroad, they are feeling a downturn in the economic situation and a decline in infrastructure. This leads to a reluctance to buy.



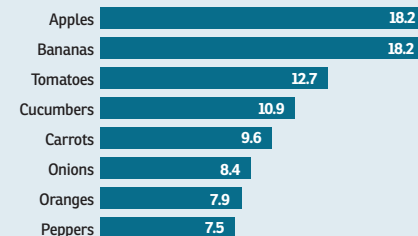
FRESH FRUIT AND VEGETABLE IMPORTS

BY ORIGIN ('000 tonnes, 2023)



TOP 8 FRUIT AND VEGETABLES 2023

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	1,420	1,291	1,377	1,333
Apples	510	448	436	474
Watermelons	437	414	458	472
Oranges	485	448	426	436
Easy peelers	402	369	348	371
Table grapes	333	356	356	371
Lemons	221	198	204	214
Avocados	122	131	161	170
Pears	167	178	166	153
Other	1,399	1,383	1,399	1,419
TOTAL	5,495	5,214	5,330	5,412

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes	756	655	698	730
Cucumbers/Gherkins	598	544	599	621
Peppers	420	397	393	410
Lettuce	329	298	295	287
Carrots	242	209	240	230
Onions	236	213	256	216
Courgettes	111	97	104	105
Broccoli, Cauliflower	83	100	86	99
Mushrooms	89	81	85	83
Other	701	608	584	591
TOTAL	3,564	3,202	3,340	3,371

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	341	309	340	313
Apples	61	51	52	48
Table grapes	23	25	25	24
Oranges	23	19	16	16
Other	192	188	187	178
TOTAL	640	593	619	579

FRESH VEGETABLES	2021	2022	2023	2024p
Onions	52	71	78	74
Carrots	56	33	95	66
White cabbage	61	63	51	45
Lettuce	48	54	45	48
Other	225	197	204	205
TOTAL	442	417	473	437

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	6,926	7,159	8,008	8,186
Export	728	728	823	773
TRADE BALANCE	-6,198	-6,431	-7,185	-7,413

FRESH VEGETABLES	2021	2022	2023	2024p
Import	5,385	5,444	6,294	5,862
Export	438	426	484	466
TRADE BALANCE	-4,947	-5,018	-5,811	-5,396



Population
10.4 m



Area
130,000 km²



GDP per Inhabitant
21,350 EUR



GDP Growth
2.6 per cent



Unemployment
6.7 per cent



CPI for Food
(2015=100)
115.8

GREECE

As with any agricultural product, the weather over the course of the year determines how strong the harvest is. In Greece, a warm December 2023 was followed by a cool January 2024, after which February was initially very mild, but then ended with cool temperatures. March was wet, but fortunately, the rainfall was not as abundant as in the previous year. Across a number of regions, the summer months were too hot. But all in all, the climate was more or less favourable, meaning that more fruit and vegetables were harvested in 2024 than in the previous year.

In table grapes, yield reductions were observed in the early and medium-early variety spectrum. A heatwave

in Crete and farm closures due to the huge increase in production costs since the end of the 2023 season resulted in a decimated harvest. Greece is the third-largest producer in Europe behind Italy and Spain.

While many countries in southern Europe have produced less citrus, the volumes in Greece are likely to be stable compared to the previous year at a total of 1.09mn tonnes.

From the 2023/24 season, Spain has focused more on early varieties of strawberries in order to be on the market in November and thus at a similar time to Greece. Greece was previously the first supplier of strawberries in Europe and set a record with an export volume of 83,000 tonnes in 2023. However, rain and cold weather in Spain had an impact on quality and quantity. Greece benefited from Spain's tight supply situation and almost maintained its high level of exports.

The Greeks' enthusiasm for expanding kiwifruit cultivation has not yet come to an end. It is thanks to this that the Greek harvest was able to increase in 2024 despite below-average yields. Greece's kiwifruit area now totals around 14,500ha, compared to 10,300ha in 2019. For the 2024/25 season, 330,000 tonnes of kiwifruit are expected to be marketed, around 6 per cent more than in the previous year. At the same time, Greece has set another record. Its biggest kiwifruit harvest to date was in 2022, when around 320,300 tonnes of kiwifruit were harvested. After the boom in area, it is only a matter of time before a new volume record is set.

After the heatwaves in 2023, vegetable crops were not as badly affected by extreme weather in 2024. The harvest volumes of fruit vegetables like tomatoes and peppers are therefore likely to have returned to a normal level.

Greece has a positive trade balance for both fruit and vegetables. In any case, fruit exports are more important than vegetable exports: while around 42 per cent of the fruit harvest leaves the country, only around 15 per cent of the vegetable harvest is exported.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Oranges	818	874	866	858
Watermelons	479	435	396	390
Kiwifruit	319	320	317	333
Apples	246	321	183	287
Peaches ¹	110	209	212	215
Table grapes	264	290	152	200
Easy peelers	181	201	171	170
Nectarines	50	144	128	154
Strawberries	86	100	108	110
Other	475	534	511	526
TOTAL	3,029	3,429	3,045	3,235

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes ¹	581	432	349	434
Peppers	138	136	108	121
Onions	138	116	109	115
Cucumbers	134	120	115	113
Lettuce	82	57	50	65
Spinach	96	69	51	62
Courgettes	61	54	48	54
Cabbage	66	50	41	49
Aubergines	60	45	41	43
Other	247	213	159	186
TOTAL	1,602	1,291	1,072	1,242

1) Excluding products grown for processing.

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	210	205	223	231
Lemons	22	25	25	27
Apples	31	13	18	22
Pineapples	17	18	19	21
Other	37	41	41	49
TOTAL	316	302	325	349

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes ¹	20	16	26	29
Mushrooms	13	14	16	16
Onions	11	8	27	9
Other	35	38	39	43
TOTAL	78	76	108	97

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Oranges	329	266	357	318
Kiwifruit	163	186	212	190
Watermelons	209	192	167	173
Easy peelers	132	131	133	145
Strawberries	68	75	83	81
Bananas	52	59	73	81
Peaches	39	70	80	68
Nectarines	20	57	51	66
Apples	78	73	54	48
Table grapes	54	47	44	42
Cherries	27	24	26	30
Other	86	103	101	100
TOTAL	1,258	1,284	1,381	1,342

FRESH VEGETABLES	2021	2022	2023	2024p
Cucumbers	51	55	66	67
Tomatoes	39	32	37	37
Carrots	8	6	11	11
Other	61	56	67	66
TOTAL	158	150	180	181

TRADE BALANCE

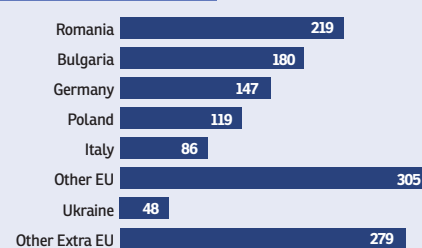
VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	225	251	276	299
Export	912	1,005	1,255	1,292
TRADE BALANCE	+687	+754	+979	+993

FRESH VEGETABLES	2021	2022	2023	2024p
Import	85	95	128	131
Export	138	143	193	193
TRADE BALANCE	+53	+48	+65	+62

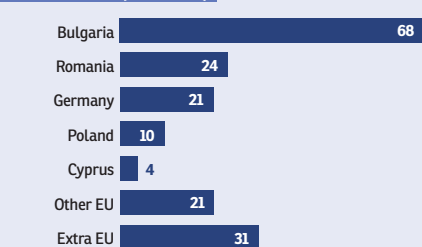
FRESH FRUIT EXPORTS 2023

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2023

BY DESTINATION ('000 tonnes)





Population
59.0 m



Area
297,800 km²



GDP per Inhabitant
36,070 EUR



GDP Growth
0.7 per cent



Unemployment
4.4 per cent



CPI for Food
(2015=100)
120.9

ITALY

The Italian fruit and vegetable sector has had to overcome a number of hurdles over the years. Italy has been particularly hard hit by the effects of climate change. While southern Italy suffered from heat and an unprecedented drought, entire areas in the north were flooded by storms in spring and autumn. Initial projections put the damage to Italian agriculture caused by the consequences of climate change at €3.5bn in 2024. As if that were not enough, for many fruit producers, the pressure from spreading invasive species such as the marmorated stink bug or other diseases such as root asphyxia in kiwifruit has been a threat for years. However, producers' hands are tied when it comes to combating them, as

more and more effective plant protection products can no longer be used. In the case of kiwifruit and apples and pears, producers have been forced to uproot infected trees. Between 2018 and 2023, 2,750ha of kiwifruit and 4,000ha of apples and pears alone were uprooted, meaning that in 2023 their production area totalled 23,850ha and 26,000ha respectively. Just a few years ago, Italy was one of the leading producers of these two types of fruit in Europe and, in the case of kiwifruit, the world.

At least apples and pears and kiwifruit could bring in a larger harvest in 2024, even if the former production potential of 600,000 tonnes of kiwifruit or 900,000 tonnes of apples and pears will be missed by a wide margin. Italy will also see an increase in the harvest of peaches and nectarines as well as table grapes and oranges compared to 2023. However, the heatwaves in summer have significantly shortened the marketing window for grapes, for example. The European market was undersupplied from autumn onwards. In contrast to other European countries, the Italian apple harvest in 2024 reached the previous year's level. Export markets in the Middle East could not be reached or only with difficulty. Other export markets, such as South and Central America or EU countries, were served more strongly. According to initial projections, Italy will be able to increase its total fruit and vegetable exports.

For years, private households in Italy have been buying less and less fresh fruit and vegetables. In January, consumption started off on a downward trend, but this was followed by a trend reversal as early as March. In spring and during the summer period, Italian families increased their fruit and vegetable purchases compared with the previous year, a positive result that must, however, be weighed against a 2023 when fruit and vegetable purchasing fell strongly due to the well-known causes of inflation and production. Overall, the available consumption data for the months of January to September indicate a stagnation in private consumption. In view of the higher sales prices, total expenditure rose slightly by 1 per cent. One trend that will continue in 2024 is that buying from organised retailers will once more gain in importance. Supermarkets and discounters in particular are benefiting from this. Specialist retailers and farmers' markets are on the decline.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples	2,053	2,113	2,175	2,160
Oranges	1,793	1,817	1,836	1,990
Melons	1,276	1,238	1,372	1,350
Table grapes	1,041	1,010	800	890
Easy peelers	831	820	831	820
Lemons	473	483	473	505
Nectarines	350	505	421	485
Peaches ²	353	438	396	425
Kiwifruits	303	365	264	280
Others	1,402	1,943	1,494	1,695
TOTAL	9,875	10,732	10,407	10,600

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes ²	1,076	973	1,058	1,090
Courgettes	623	583	578	590
Lettuce	502	481	554	545
Fennel	511	334	506	510
Carrots	512	563	444	485
Onions	422	403	388	420
Artichokes	384	386	377	385
Cauliflower/Broccoli	368	359	359	360
Aubergines	318	315	324	350
Sweet peppers	251	238	235	235
Others	1,998	1,965	2,590	2,210
TOTAL	6,966	6,400	7,414	7,180

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	811	783	829	860
Pineapples	151	144	146	145
Oranges	133	195	189	140
Pears	128	106	116	140
Others	763	646	684	755
TOTAL	1,986	1,874	1,964	2,040

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes ²	128	145	130	150
Lettuce	116	129	130	135
Onions	57	55	89	115
Others	337	353	348	375
TOTAL	638	682	697	775

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples	908	855	834	875
Table grapes	466	445	378	475
Watermelons	282	261	251	315
Kiwifruit	269	269	288	215
Bananas	104	91	110	140
Oranges	129	96	105	120
Peaches/Nectarines	98	140	86	120
Easy peelers	53	59	60	80
Plums	32	48	33	50
Others	279	269	246	235
TOTAL	2,620	2,533	2,391	2,625

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Lettuce	195	201	204	200
Carrots	98	74	93	120
Cauliflower/Broccoli	91	82	85	100
Tomatoes	70	59	81	85
Kohlrabi/Kale	79	68	66	80
Beetroot	58	59	65	75
Fennel	59	48	51	50
Spinach	39	37	36	35
Courgettes	26	28	25	25
Others	196	175	182	195
TOTAL	911	831	888	965

TRADE BALANCE

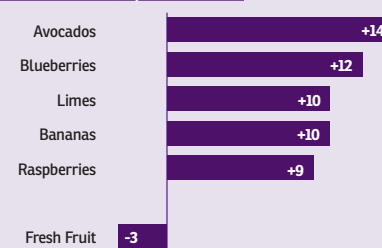
VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	1,882	1,893	2,196	2,373
Export	3,092	3,182	3,386	3,747
TRADE BALANCE	+1,210	+1,289	+1,190	+1,374

FRESH VEGETABLES	2021	2022	2023	2024p
Import	810	984	1,066	1,097
Export	1,591	1,582	1,873	1,840
TRADE BALANCE	+781	+598	+807	+743

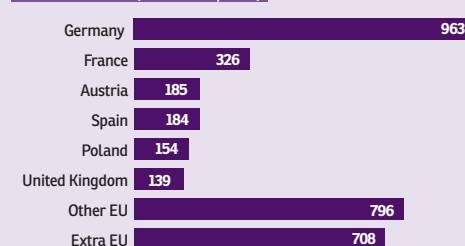
TOP 5 FRESH FRUIT EXPORTS

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



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2023)





Population
17.9 m



Area
34,000 km²



GDP per Inhabitant
59,720 EUR



GDP Growth
-0.9 per cent



Unemployment
2.7 per cent



CPI for Food
(2015=100)
127.8

NETHERLANDS

Although the Netherlands is one of the smaller EU countries, it holds a key position as a trading hub for imports and exports. And despite its comparatively modest production, the country ranks as the second-largest exporter of fresh fruit within the EU, behind Spain, with a significant volume of imported fruit entering Europe through Dutch ports.

After winter production was expanded again in 2023 following the energy crisis, so-called fruit vegetables were once again grown year-round in the Netherlands. However, the spring was very wet, and there was a lack of warm weather in the summer months.

In the first five months of last year, 311,000 tonnes of tomatoes (including some re-exports) were sold by

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Pears	340	352	358	327
Apples	243	235	199	197
Strawberries	86	87	79	75
Other berries	21	22	22	11
Other	36	40	38	26
TOTAL	726	736	696	636

FRESH VEGETABLES	2021	2022	2023	2024p
Onions	1,788	1,483	1,577	1,818
Tomatoes	880	770	726	790
Carrots	643	489	486	531
Cucumbers	440	440	426	433
Peppers	440	435	420	425
Mushrooms	260	235	205	208
Leeks	105	95	126	120
White cabbage	97	106	125	113
Iceberg lettuce	91	88	90	92
Celeriac	82	80	94	88
French beans	60	52	70	64
Brussel sprouts	63	62	53	58
Aubergines	63	66	60	57
Cauliflower	51	49	53	51
Other	611	504	555	544
TOTAL	5,695	4,959	5,066	5,392

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

Dutch companies to customers abroad, mainly in neighbouring countries. This was significantly more than in the previous year, when production was lower due to high energy costs. Compared with 2021, however, this is still a decrease of 12 per cent. Overall, Dutch tomato production is returning to a normal level. The estimated summer production is 710,000 tonnes. However, specialties remain vulnerable due to a lack of resistance to the ToBREV virus. New resistant varieties yielded 7 per cent less due to suboptimal cultivation strategies and a dark spring. Compared with the previous year, more small-fruited varieties were grown again. Aubergine production area was also smaller and was affected by the dark spring weather with a lack of light and a lot of rain.

In its preliminary harvest estimate for this year, Dutch statistics authority CBS shows a significantly higher gross total harvest volume of seed onions than in 2023 at around 1.5mn tonnes (+15 per cent), which is even slightly higher than the previous record year of 2021. The enormous difference compared to the previous year is due to an increase in area of around 12 per cent to 32,526ha. The total yield is also slightly higher than in the previous year. Despite the wet spring and difficult sowing conditions, the area planted with onions in the Netherlands has never been as large as in 2024. Eighty-six per cent of the area was planted with yellow onions, and the remaining 14 per cent with red onions. The total gross harvest of yellow seed onions is estimated at 1.3mn tonnes (+13 per cent). The area planted with onions increased again after two years of decline. Around 6,270ha of onion sets were produced in 2024, returning to the level of 2021.

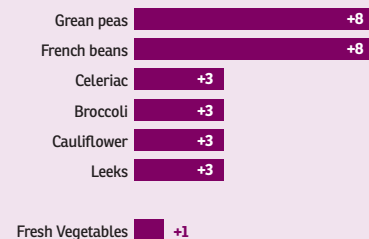
The wet spring meant that field vegetables started the season later. Stored vegetables such as white cabbage, carrots, celery, and beetroot were harvested later in autumn in order to generate growth. In some cases, it was still possible to catch up.

Compared with vegetables, fruit production is significantly lower, and dominated by apples, pears and strawberries. Pear harvests remain steady due to a high proportion of frost protection systems.



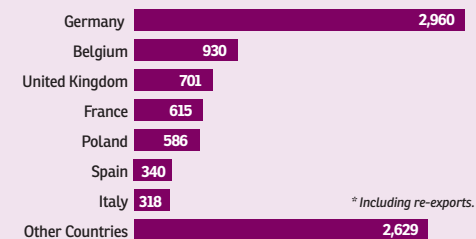
TOP 6 PRODUCTION OF FRESH VEGETABLES

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



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION* ('000 tonnes, 2023)



* Including re-exports.

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT ²	2021	2022	2023	2024p
Bananas	1,469	1,466	1,370	1,456
Oranges	622	569	600	578
Avocados	457	462	498	500
Table grapes	460	501	462	473
Easy Peelers	253	244	266	256
Pineapple	286	225	237	247
Other	2,118	2,105	1,876	1,900
TOTAL	5,664	5,572	5,309	5,411

FRESH VEGETABLES	2021	2022	2023	2024p
Onions	318	181	250	272
Tomatoes	243	256	220	252
Cucumbers	96	106	129	113
Lettuce	100	108	100	98
Other	826	780	870	875
TOTAL	1,584	1,431	1,569	1,610

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT ^{1,2}	2021	2022	2023	2024p
Bananas	950	1,024	1,039	957
Avocados	410	413	439	447
Pears	394	406	382	405
Table grapes	396	341	337	373
Oranges	364	322	371	345
Other	1,931	1,736	1,743	1,716
TOTAL	4,446	4,243	4,311	4,242

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Onions	1,586	1,611	1,433	1,626
Tomatoes	957	907	866	917
Cucumbers	486	432	453	461
Carrots	424	448	454	457
Peppers	393	394	394	383
Lettuce	164	159	149	160
Celeriac	101	98	96	105
Cabbage	94	103	90	91
Other	806	818	818	793
TOTAL	5,011	4,971	4,753	4,994

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT ²	2021	2022	2023	2024p
Import	7,045	7,628	7,947	8,250
Export ¹	7,025	7,111	7,870	8,227
TRADE BALANCE	-20	-516	-77	-23

FRESH VEGETABLES	2021	2022	2023	2024p
Import	1,828	2,014	2,249	2,261
Export ¹	5,821	6,126	6,788	6,662
TRADE BALANCE	+3,993	+4,111	+4,539	+4,401



Population
22.2 m



Area
752,400 km²



GDP per Inhabitant
55,832 EUR



GDP Growth
-0.2 per cent



Unemployment
4.8 per cent



CPI for Food
(2015=100)
120.9

NORDIC COUNTRIES

DENMARK, FINLAND, SWEDEN

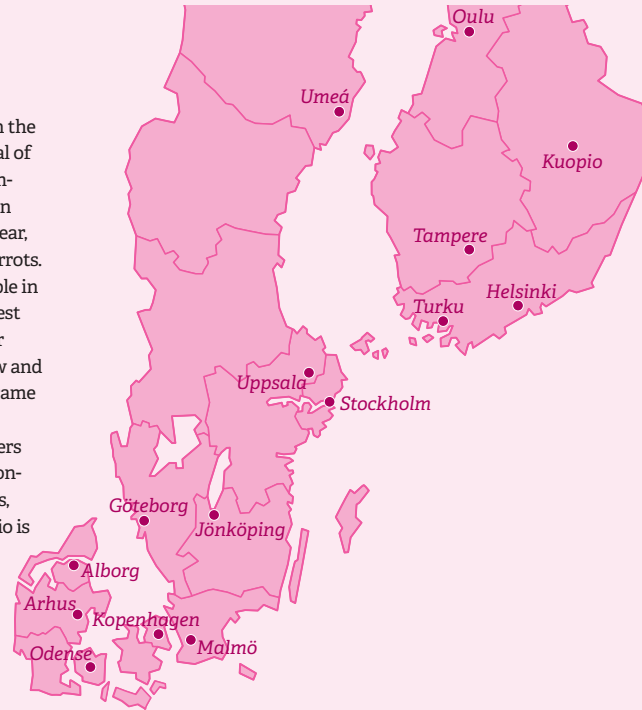
Weather conditions in the Nordic countries in 2024 were extreme in some cases. The winter was cold and snowy, especially in parts of Sweden. Temperatures in spring were initially low, but then rose. Plenty of rainfall, especially in May, led to lush growth, but also caused delays in outdoor production. The summer months were warmer than usual, with some pronounced heatwaves in Sweden and Denmark, but also in southern Finland. In some cases, it was too dry during the heatwaves. Autumn was again too wet with a lot of precipitation, and warmer than in other years. These were difficult conditions to produce autumn and storage vegetables. Despite the sometimes-difficult weather conditions, larger quantities of fruit and vegetables were harvested again after the slump in 2023. The fruit harvest is estimated at 131,000 tonnes. That is 9 per cent more than in the previous year. The increase is mainly due to a larger

apple harvest in Denmark. The vegetable harvest in the Nordic countries is estimated to have reached a total of around 915,000 tonnes, an increase of 5 per cent compared to the previous year. While harvest volumes in Denmark were mostly lower than in the previous year, Sweden and Finland harvested more onions and carrots.

Economic and political conditions are quite stable in the Nordic countries, which have experienced modest economic growth fuelled by robust demand in their domestic markets. Unemployment rates remain low and inflation rate stable, although food and energy became more expensive in 2024. Nevertheless, conditions favoured stable demand. On the one hand, consumers are paying more attention to sustainable and environmentally friendly products when making purchases, while on the other hand, the price-performance ratio is becoming more important in view of the high cost of living.

According to provisional figures, imports from the Nordic countries fell slightly compared to the previous year due to the slightly larger harvest volumes. A total of 1.22mn tonnes of fruit were imported. Sweden imported a slightly larger quantity than in the previous year, while imports to Denmark and Finland were lower. While the trend in fruit imports was moderate, the decline in vegetable imports was more pronounced. At 683,000 tonnes, 5 per cent less was imported than in the previous year. This is exclusively due to Denmark, as imports to Finland and Sweden have increased. The developments in 2024 are also more of a return to the multi-year average. Imports of vegetables were above average in 2023. Exports of fruit and vegetables play a subordinate role. Only Denmark exports larger quantities of vegetables. Carrots are exported to other countries, including Germany.

The foreign trade deficit for fruit has widened slightly compared to the previous year. The value of imported goods has risen, while the value of exports has fallen. Following the decline in 2023, the calculated level of self-sufficiency has risen above the ten per cent mark again. The foreign trade deficit for vegetables fell slightly compared to the previous year. Despite the slightly lower export volume, the value of exports has risen. The higher domestic production and the decline in the volume of imports mean that the self-sufficiency rate for vegetables has risen to just under 61 per cent. In the previous year, this figure was 58 per cent.



PRODUCTION

VOLUME ('000 tonnes)

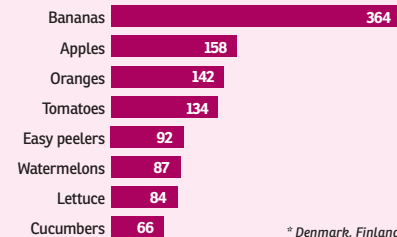
FRESH FRUIT	2021	2022	2023	2024p
Denmark	49	61	43	53
- Apples	31	41	24	34
- Pears	7	8	8	7
- Strawberries ²	7	6	5	6
Finland	28	28	25	27
- Strawberries ²	16	16	14	16
- Apples	8	7	8	7
Sweden	52	50	51	51
- Apples	32	32	32	33
- Strawberries ²	16	16	16	15
TOTAL	128	139	120	131

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Denmark	265	245	239	225
- Carrots	82	75	76	74
- Onions	61	65	64	60
- White cabbage	15	11	15	13
Finland	279	286	266	295
- Carrots	76	76	64	77
- Tomatoes	38	34	31	34
Sweden	409	385	369	395
- Carrots	123	114	108	117
- Onions	55	61	68	75
TOTAL	952	915	874	915

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

FRUIT AND VEGETABLE IMPORTS 2023

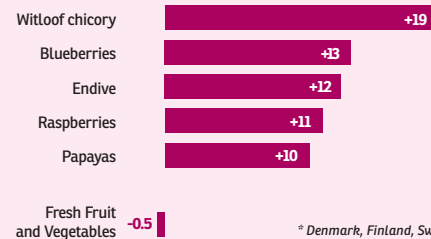
BY NORDIC COUNTRIES* ('000 tonnes)



* Denmark, Finland, Sweden.

TOP 5 FRUIT AND VEGETABLE IMPORTS

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



* Denmark, Finland, Sweden.

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Denmark	405	372	378	367
- Bananas	83	81	92	85
- Oranges	47	47	43	41
- Apples	59	41	43	42
Finland	314	276	259	235
- Bananas	109	101	90	48
- Apples	33	29	31	31
Sweden	670	654	610	620
- Bananas	189	196	181	179
- Oranges	85	86	83	80
TOTAL	1,389	1,302	1,247	1,222

FRESH VEGETABLES	2021	2022	2023	2024p
Denmark	216	199	271	206
- Tomatoes	38	38	34	36
- Cucumbers	25	24	24	24
- Lettuce	26	23	23	24
Finland	117	126	106	123
- Tomatoes	25	24	23	25
- Lettuce	24	24	24	23
Sweden	348	358	343	355
- Tomatoes	89	85	76	81
- Cucumbers	37	37	37	41
TOTAL	680	683	720	683

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Denmark	35	30	34	30
- Bananas	2	4	12	7
- Apples	8	6	3	3
Finland	7	7	6	4
Sweden	48	53	40	42
TOTAL	89	90	80	76

FRESH VEGETABLES	2021	2022	2023	2024p
Denmark	52	63	59	58
- Carrots	30	34	28	27
- Onions	5	7	9	11
Finland	2	6	5	5
Sweden	20	21	24	22
TOTAL	73	90	89	86

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	1,693	1,666	1,675	1,691
Export	110	117	112	100
TRADE BALANCE	-1,583	-1,549	-1,564	-1,591

FRESH VEGETABLES	2021	2022	2023	2024p
Import	1,194	1,234	1,311	1,294
Export	144	166	169	172
TRADE BALANCE	-1,050	-1,067	-1,142	-1,122



Population
36.6 m



Area
307,200 km²



GDP per Inhabitant
22,0860 EUR



GDP Growth
0.5 per cent



Unemployment
1.8 per cent



CPI for Food
(2015=100)
143.5

POLAND

Due to mild weather conditions at the beginning of the year 2024, horticultural production in Poland was noticeably earlier this year by up to two weeks. As a result, late frosts at the end of April hit numerous fruit crops in bloom, including apples and pears and sour cherries, and significantly reduced the harvest. High humidity increased the risk of fungal infections and the shelf-life of the fruit in long-term storage is estimated to be lower in 2024. In addition, the earlier maturity of many crops this year meant that many types of fruit ripened at the same time and the number of harvest workers was scarce. At 4.1mn tonnes, the Polish fruit harvest is around 17 per cent lower than 2023. The harvest volume of tree fruit was significantly reduced due to frost-

related losses. Sweet cherries (52,000 tonnes) and sour cherries (127,000 tonnes) in particular are both 25 per cent under 2023. The 2024 apple harvest of 3.2mn tonnes is around 18 per cent lower than in the previous year. At 106,000 tonnes, the plum harvest was also 17 per cent below 2023 level. The adverse weather conditions in Poland also caused considerable losses for many berries. For example, 109,000 tonnes of currants (-16 per cent) and 83,000 tonnes of raspberries (-14 per cent) were harvested in 2024. Only blueberries, at 63,000 tonnes, achieved a 2 per cent increase in production compared to 2023.

Delays in sowing and frost losses had a negative impact on the 2024 vegetable harvest in Poland. However, improved weather conditions during the main harvest allowed some crop volumes to increase. As a result, vegetable output in 2024 was on a par with the previous year at around 5.2mn tonnes. While there were noticeable declines in the production of cauliflower at 108,000 tonnes (-15 per cent), cabbage at 571,000 tonnes (-9 per cent) and cucumbers at 385,000 tonnes (-14 per cent), the production of tomatoes and onions increased. However, due to wet weather during the storage of onions, sorting losses were high, which will noticeably reduce the net harvest volume for 2024.

In 2023, Polish exports to Germany remained stable compared with 2022. However, the country exported around one-third less to Egypt in 2023 than in the year before. While exports to other EU countries increased by 9 per cent, they fell by 7 per cent outside of Europe. At 788,000 tonnes, total vegetable exports in 2024 remained stable compared to 2023. However, exports of carrots fell by more than a third in 2024, while cabbage and peppers were also down on the previous year. At 1.1mn tonnes, total fruit exports remained at the 2023 level. However, exports of bananas, cider apples and blueberries increased by almost a fifth. Strawberries recorded a 21 per cent drop in exports.

With 1.7mn tonnes of fruit, in 2024 around 4 per cent more was imported than in 2023. Imports of watermelons in particular increased by 12 per cent to 198,000 tonnes. At 959,000 tonnes, total vegetable imports increased by 6 per cent in 2024 compared with the previous year. Imports of cucumbers recorded an increase of 14 per cent.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2021	2022	2023	2024p
Apples	4,067	4,265	3,893	3,200
Strawberries	156	185	180	159
Sour cherries	167	184	169	127
Currants	152	146	130	109
Plums	117	133	127	106
Raspberries	104	105	96	83
Pears	69	81	79	74
Sweet cherries	59	77	69	52
Blueberries	55	64	62	63
Other	113	124	120	103
TOTAL	5,060	5,363	4,924	4,076

FRESH VEGETABLES ²	2021	2022	2023	2024p
Tomatoes	816	787	817	925
Onions	618	650	634	675
Cabbage	687	644	628	571
Carrots	638	620	577	559
Cucumbers	433	472	448	385
Mushrooms	345	350	355	373
Beetroot	241	242	253	241
Cauliflower	138	132	127	108
Other	1,453	1,546	1,326	1,326
TOTAL	5,369	5,443	5,165	5,163

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

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	523	449	494	502
Watermelons	187	166	176	198
Easy peelers	168	157	164	170
Lemons	141	137	138	140
Oranges	157	155	142	138
Other	540	506	531	559
TOTAL	1,716	1,569	1,646	1,706

FRESH VEGETABLES	2021	2022	2023	2024p
Tomatoes	174	181	216	234
Onions	158	220	183	191
Cucumbers	73	79	84	96
Peppers	68	69	69	75
Other	311	353	354	364
TOTAL	784	902	906	959

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Apples	917	693	782	783
Pears	117	108	109	108
Bananas	70	57	39	47
Cider apples	22	40	27	32
Blueberries	22	23	22	26
Easy peelers	18	17	17	17
Strawberries	19	14	20	16
Other ⁴	108	93	89	82
TOTAL	1,293	1,045	1,106	1,111

FRESH VEGETABLES	2021	2022	2023	2024p
Mushrooms	254	256	250	258
Onions	134	191	144	154
Tomatoes	67	82	76	79
Cabbage	44	65	60	54
Peppers	22	26	28	26
Carrots	26	50	39	25
Cauliflower, Broccoli	23	21	20	22
Other	163	186	175	170
TOTAL	734	878	792	788

TRADE BALANCE

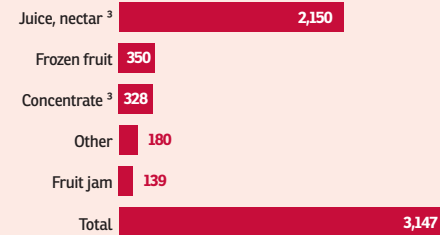
VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	1,572	1,683	1,950	1,997
Export	728	691	818	872
TRADE BALANCE	-844	-992	-1,132	-1,126

FRESH VEGETABLES	2021	2022	2023	2024p
Import	860	981	1,269	1,186
Export	771	952	1,069	1,054
TRADE BALANCE	-89	-29	-200	-132

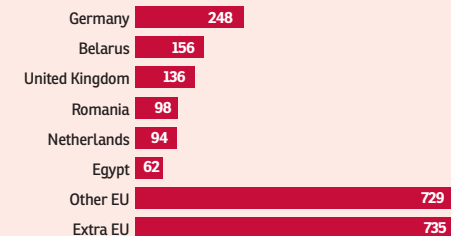
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2023/24)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2023)





Population
10.6 m



Area
91,000 km²



GDP per Inhabitant
25,280 EUR



GDP Growth
1.5 per cent



Unemployment
4.4 per cent



CPI for Food
(2015=100)
119.0

PORTUGAL

Recent years have seen both stability and challenges in Portugal's agricultural sector. Following two strong years, the latest data highlights a shift in production trends and trade for fruit and vegetables.

Imports of key fruits remained largely stable. Bananas, oranges, and pineapples maintained consistent import levels compared to previous years. However, watermelon imports stood out with a significant increase of 18 per cent, signalling a rise in domestic consumption for this fruit.

On the export side, there were more mixed results. Oranges, after two strong years of growth, experienced a decline of 10 per cent. Lemon exports also dropped significantly, falling to 27,000 tonnes—the lowest level in the past four years.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Oranges	364	378	279	348
Apples ¹	368	291	295	307
Pears	225	132	112	124
Melons	70	60	53	61
Kiwifruit	55	53	49	51
Easy peelers	43	43	37	38
Peaches	42	32	36	32
Raspberries	28	30	36	30
Watermelons	31	30	28	29
Blueberries	17	19	21	18
Other	262	255	355	305
TOTAL	1,506	1,323	1,300	1,342

FRESH VEGETABLES ²	2021	2022	2023	2024p
Tomatoes ¹	150	128	126	157
Carrots	141	100	120	132
Cabbage	128	128	104	110
Pumpkins	127	81	96	106
Onions	66	60	55	62
Lettuce	75	56	69	60
Savoy cabbage	56	50	50	51
Peppers	54	41	47	49
Broccoli	40	33	33	38
Other	400	305	377	356
TOTAL	1,237	984	1,100	1,022

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

Vegetable exports remained largely stable, but there were some notable changes. Carrot exports grew by 5,000 tonnes, a 16 per cent increase, reflecting strong performance in this category. Conversely, onion exports plummeted from 9,000 tonnes to just 5,000 tonnes, marking a steep 45 per cent decline and the lowest level recorded in recent years. Tomato exports showed a positive trend, increasing from 5,000 tonnes to 8,000 tonnes, highlighting steady growth in this area and positioning Portugal as one of the largest tomato producers in Europe, only behind Spain and Italy.

The production of oranges demonstrated a notable recovery in 2024, with a 25 per cent year-on-year increase, following a decline in output in 2023. However, certain fruits, including peaches and raspberries, experienced a decline in production. This is mainly due to the difficult weather conditions, the drought which resulted in a shorter harvest and much of the fruit ripening very quickly. An 11 per cent increase in production of pears was noted. However, this increase was not observed across all varieties; for instance, the main variety, Rocha, has experienced a decline in crops in recent years.

Portuguese pears were originally exported to South America, especially Brazil. However, due to increasing competition, the product is now much more present on the EU market and in the UK with a market share of 13 per cent in 2023. In Germany, the product is mainly sold at Lidl.

In the vegetable category, tomatoes saw a robust 25 per cent year-on-year increase in volume, followed by carrots, cabbage, pumpkins, onions, and broccoli, which registered growth of around 10 per cent compared with 2023. These trends reflect a solid performance in Portugal's vegetable sector.

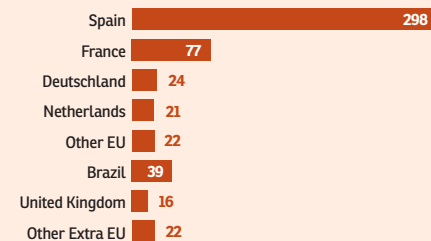
Spain is the primary export destination, followed by France, where 15 per cent of fruit exports are destined. The UK and Brazil are the leading non-EU destinations.

The trade balance for fruits remained negative in 2024. However, the deficit was smaller than in 2023, due to a combination of reduced fruit imports and increased exports, reflecting efforts to address imbalances in the fruit trade. The vegetable sector achieved a balanced trade balance in 2024, primarily driven by record-high vegetable exports, which reached new heights, alongside a slight decrease in imports. These developments are indicative of the sector's increasing competitiveness in international markets.



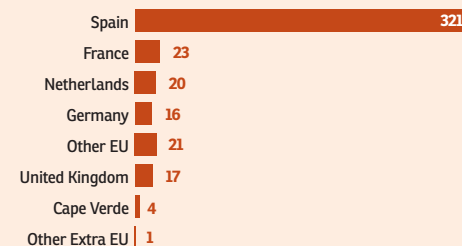
FRESH FRUIT EXPORTS 2023

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2023²

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	224	224	226	221
Oranges	129	112	134	131
Pineapples	61	70	69	66
Watermelons	41	47	45	53
Apples	66	44	66	52
Melons	48	46	44	47
Other	324	327	299	311
TOTAL	893	871	882	881

FRESH VEGETABLES ²	2021	2022	2023	2024p
Onions	75	86	85	88
Tomatoes	41	52	57	56
Carrots	23	30	41	37
Peppers	21	24	27	27
Cauliflower	29	29	22	25
Pumpkins	11	6	8	8
Other	78	84	98	83
TOTAL	279	312	338	324

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Oranges	127	140	141	126
Pears	90	119	69	74
Apples	47	82	64	60
Kiwifruit	24	30	30	30
Raspberries	27	27	28	30
Lemons	34	63	35	27
Other	152	164	138	149
TOTAL	500	624	505	496

FRESH VEGETABLES ²	2021	2022	2023	2024p
Carrots	29	17	30	35
Pumpkins	34	32	26	28
Other cabbage	34	13	25	28
Courgettes	7	8	7	8
Tomatoes ¹	8	4	5	8
Leeks	5	4	6	7
Onions	5	8	9	5
Other vegetables	58	89	74	67
TOTAL	180	176	182	178

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	764	835	968	930
Export	654	794	834	873
TRADE BALANCE	-110	-41	-134	-57

FRESH VEGETABLES ²	2021	2022	2023	2024p
Import	214	257	361	343
Export	191	214	298	341
TRADE BALANCE	-23	-43	-63	-2



Population
48.6 m



Area
502,700 km²



GDP per Inhabitant
30,970 EUR



GDP Growth
1.4 per cent



Unemployment
8.0 per cent



CPI for Food
(2015=100)
119.9

SPAIN

Spain's agricultural sector experienced a positive year, primarily due to a substantial increase in production, which grew by 4.3 per cent according to data from the Ministry of Agriculture. But producers faced different challenges, including further periods of drought, damage caused by the meteorological phenomenon Dana (Isolated High-Level Depression), and lower prices for fruits and vegetables.

Nevertheless, they increased their production compared with 2023. Various fruits like oranges, easy peelers and melons recovered after two years with lower production. In fresh vegetables, growers achieved significant increases in peppers, onions and carrots compared with the previous year, driven by favourable weather conditions. The situation was different for lemons, which, following a successful harvest in 2023, were

expected to experience a 20 per cent decrease in production in 2024. The significant variations in Spanish lemon production in recent years demonstrate the volatility of the sector and the challenge for Spain to maintain its competitive position.

Dana's impact on the province of Valencia was of course considerable. The meteorological phenomenon, marked by heavy rain, strong winds and hail, seriously affected production, with expected losses of more than 70 per cent in persimmon production.

On the foreign trade side, Spain continues to position itself as one of the most important exporters of fruit and vegetables in the EU and worldwide. Avocado is entering a highly competitive market and is one of the fastest-growing exported fruits, with an export volume growth of 7.1 per cent in the last decade. Most of the fruit production is concentrated in the Andalusia region. However, it is notable that imports of this fruit from third countries have reached an all-time high in 2024, with an estimated 250,000 tonnes of avocados being imported.

Other fruits that have seen a consistent rise in their export volume include citrus, particularly easy peelers, which experienced a 24 per cent export volume growth in 2024, followed by lemons and oranges, thereby solidifying Spain's position as a global leader in the production of fresh citrus. In addition to this, watermelon has experienced a surge in exports, exhibiting a growth rate of over 10 per cent in export volume during the previous year.

In the vegetable market, tomatoes and peppers are the most exported Spanish vegetables. The production and export of tomatoes and peppers are in continuous growth, with an increase in the quantity exported of 18 per cent and 13 per cent respectively. The increase in the quantities harvested last season also presented a challenge for these vegetables, as farmers faced an overproduction of these products at the end of the year, resulting in a drop in price to levels that no longer represented a profit. A similar situation was experienced with courgettes, which demonstrated growth in exports and significant price volatility in the final months of the year. Lettuce also demonstrated growth, with approximately 761,000 tonnes exported in 2024, representing an increase compared with the previous year. Spain is the foremost exporter of this vegetable, and its primary trading partners are neighbouring countries.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Oranges	3,749	2,873	2,643	2,977
Easy peelers	2,122	1,865	1,770	2,019
Watermelons	1,382	1,164	1,153	1,253
Lemons	1,046	887	1,184	942
Peaches ¹	507	569	829	840
Apples ¹	563	498	558	585
Melons	653	524	515	574
Nectarines	447	317	526	510
Table grapes	308	292	335	363
Strawberries	361	328	327	322
Other	2,869	2,834	2,168	2,808
TOTAL	14,007	12,151	12,009	13,193

FRESH VEGETABLES ²	2021	2022	2023	2024p
Tomatoes ¹	1,688	1,653	1,608	1,693
Peppers ¹	1,406	1,573	1,241	1,482
Onions	1,567	1,223	1,157	1,370
Lettuce	1,064	967	919	908
Cucumbers	746	693	749	746
Courgettes	638	770	749	721
Broccoli	535	502	483	528
Carrots	429	388	325	399
Garlic	316	178	211	240
Other	1,995	1,820	1,805	1,901
TOTAL	10,384	9,765	9,246	9,988

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	370	404	425	416
Avocados	214	210	242	250
Oranges	184	117	234	218
Apples	188	198	219	195
Other	1,112	1,231	1,128	1,112
TOTAL	2,068	2,160	2,248	2,191

FRESH VEGETABLES ²	2021	2022	2023	2024p
Tomatoes ¹	179	188	189	172
Beans	129	116	102	122
Onions	109	96	144	122
Other	286	351	266	291
TOTAL	703	751	701	707

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Oranges	1,490	1,623	1,262	1,274
Easy Peelers	1,326	1,044	1,000	1,243
Watermelons	906	684	692	786
Lemons	707	648	619	684
Melons	412	343	333	347
Nectarines	323	278	308	335
Strawberries	317	287	256	257
Persimmons	188	120	171	173
Peaches	323	262	146	156
Other	1,427	1,488	1,640	1,460
TOTAL	7,419	6,777	6,427	6,715

FRESH VEGETABLES ²	2021	2022	2023	2024p
Peppers	842	796	720	810
Lettuce	812	730	741	761
Cucumbers	664	695	678	710
Tomatoes	660	635	575	681
Brassicas	522	502	475	513
Courgettes	454	354	382	402
Onions	337	313	292	314
Aubergines	168	151	177	188
Garlic	175	165	151	148
Other	787	580	598	656
TOTAL	5,421	4,921	4,789	5,183

TRADE BALANCE

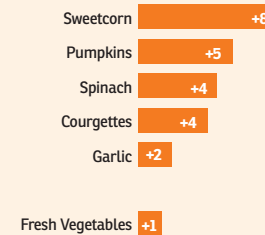
VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	2,389	2,592	3,063	3,312
Export	8,921	8,843	8,970	9,929
TRADE BALANCE	+6,732	+6,994	+6,460	+6,617

FRESH VEGETABLES ²	2021	2022	2023	2024p
Import	652	808	938	1,052
Export	6,464	6,949	7,678	7,776
TRADE BALANCE	+5,812	+6,314	+6,150	+6,724

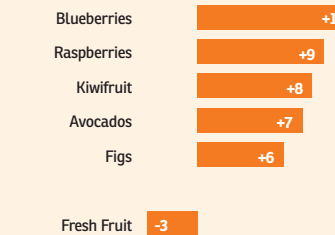
TOP 5 FRESH VEGETABLE EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2014-2023)



TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2014-2023)





Population
38.9 m



Area
491,400 km²



GDP per Inhabitant
18,400 EUR



GDP Growth
1.6er cent



Unemployment
3.1 per cent



CPI for Food
(2015=100)
140.8

SOUTHEAST EUROPE

BULGARIA, CROATIA, HUNGARY, ROMANIA

Eastern European countries endured a massive and prolonged heatwave in the summer of 2024. High temperatures and a lack of rainfall led to massive yield losses for many types of fruit and vegetables. However, some regions also experienced heavy rainfall in summer and autumn, which led to flooding and damage to infrastructure. The sometimes extreme weather conditions were not without consequences to produce fruit and vegetables. According to preliminary figures, the 2024 fruit harvest of 2.65mn tonnes was almost ten per cent down on the previous year. The decline in the

harvest volume of apples in Hungary was particularly severe, with a shortfall of around 40 per cent compared to the previous year. Only in Bulgaria was the fruit harvest slightly larger than in the previous year, while in Croatia and Romania there was a year-on-year shortfall of around ten per cent in each case. The effects of the heatwave on the vegetable harvest were not as severe. Overall, there was a shortfall of around 2 per cent compared to the previous year's harvest. In Croatia, the decline was above average at 25 per cent, although vegetable production in Croatia only plays a minor role. In Hungary, vegetable production is dominated by sweetcorn for the processing industry. Due to the weather conditions, the sweetcorn harvest in Hungary is estimated to be 18 per cent lower than in the previous year. Romania estimates that the vegetable harvest was slightly higher than in the previous year, with onions and cabbage being harvested in larger quantities.

Despite the smaller harvest volumes, exports from South-East European countries fell only slightly. Fruit exports even increased slightly. A total of 389,000 tonnes of fruit were exported, with Hungary being the largest exporter. Watermelons are mainly exported from here. According to provisional figures, exports of vegetables amounted to 238,000 tonnes. Of the four countries, only Romania exported a larger quantity than in the previous year. More than half of vegetable exports from Romania are cucumbers, which are also destined for the German market. Imports of fruit and vegetables to Southeast European countries increased slightly in 2024, with Hungary importing a larger quantity. Bananas are the fruit imported in the largest quantities for all countries. Among the vegetables, tomatoes achieve the highest import volume. In terms of value, the foreign trade balance of the Southeast European countries is negative for both fruit and vegetables. The deficit has become even greater than in previous years. The degree of self-sufficiency of the South-East European countries fell in 2024 for both fruit and vegetables. This continues the trend of recent years. In mathematical terms, however, the countries are still 64 per cent self-sufficient in fruit. The self-sufficiency rate for vegetables is even higher at 78 per cent. Both are very high figures.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bulgaria	382	343	308	369
- Plums	65	57	58	69
- Cherries	57	58	50	60
Croatia	151	155	163	147
- Apples	65	57	66	61
- Easy peelers	40	42	44	40
Hungary	841	678	816	644
- Apples	520	280	550	330
- Sour cherries	61	66	56	55
Romania	2,106	1,674	1,656	1,490
- Plums	807	666	645	677
- Apples	594	543	531	451
Total	3,480	2,850	2,943	2,651

FRESH VEGETABLES	2021	2022	2023	2024p
Bulgaria	332	318	330	313
- Tomatoes	94	93	85	78
- Peppers	62	47	52	49
Croatia	140	131	128	96
- Cabbage	29	26	29	24
Hungary	1,260	1,120	1,300	1,222
- Sweetcorn ¹	472	393	510	417
- Tomatoes ²	172	138	177	181
- Peppers	93	85	91	90
Romania	1,941	1,255	1,198	1,258
- Cabbage	548	387	357	375
- Tomatoes	500	299	272	270
- Onions	219	145	143	159
Total	3,673	2,824	2,955	2,889

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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bulgaria	374	381	383	376
- Bananas	73	63	70	65
Croatia	242	260	291	296
- Bananas	78	88	91	95
Hungary	291	336	312	344
- Bananas	78	83	89	93
Romania	830	852	872	870
- Bananas	232	231	224	223
Total	1,736	1,828	1,858	1,886

FRESH VEGETABLES	2021	2022	2023	2024p
Bulgaria	257	235	244	240
- Tomatoes	100	90	99	98
- Peppers	33	26	30	30
Croatia	123	138	152	155
Hungary	179	169	195	203
- Cucumbers	31	22	27	28
Romania	389	387	420	445
- Tomatoes	90	84	93	99
- Onions	63	62	64	61
Total	948	929	1,011	1,044

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bulgaria	57	75	68	72
Croatia	88	98	118	119
- Easy peelers	26	30	36	34
Hungary	124	128	154	163
- Watermelons	33	30	54	63
Romania	33	46	36	34
Total	302	347	376	389

FRESH VEGETABLES	2021	2022	2023	2024p
Bulgaria	52	35	37	33
Croatia	27	29	35	32
Hungary	94	88	111	105
Romania	53	72	63	69
- Cucumbers	26	36	38	38
Total	225	224	245	238

TRADE BALANCE

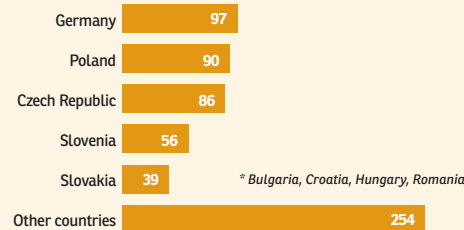
VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	1,296	1,443	1,718	1,796
Export	234	287	346	362
TRADE BALANCE	-1,062	-1,156	-1,372	-1,434

FRESH VEGETABLES	2021	2022	2023	2024p
Import	748	845	1,087	1,077
Export	318	358	417	379
TRADE BALANCE	-429	-486	-670	-697

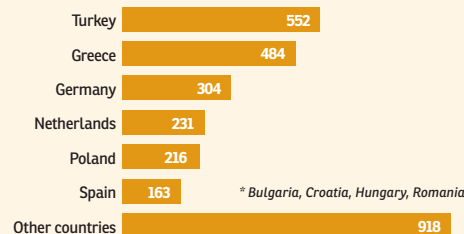
FRUIT AND VEGETABLE EXPORTS 2023

BY SOUTHEAST COUNTRIES* ('000 TONNES)



FRUIT AND VEGETABLE IMPORTS 2023

BY SOUTHEAST COUNTRIES* ('000 TONNES)





Population
6.6 m



Area
85,000 km²



GDP per Inhabitant
10,840 EUR



GDP Growth
4.5 per cent



Unemployment
5.8 per cent



CPI for Food
(2015=100)
144.2

SOUTHEAST EUROPE **SERBIA**

The weather was not ideal for Serbia's fruit and vegetable producers in 2024. Frosts in the third week of April were followed by significant damage from hail. Then the summer of 2024 was the hottest since weather records began, with five heatwaves. As irrigation systems were mostly absent for open-field production, yields declined. High temperatures, particularly in areas without anti-hail nets, affected the quality of the fruit, especially plums, whose fruit became dehydrated and shrivelled.

In contrast, the sweet cherry harvest varied greatly from region to region with significant losses in central Serbia and a good crop in the northern region of Vojvodina. The sour cherry harvest was also decimated by the late frosts, but this was offset by high prices. As a result, the fruit harvest of an estimated 1.4mn tonnes and the vegetable harvest of around 500,000 tonnes are among the smallest in recent years.

Regionally, yield losses were particularly high in vegetable fields without irrigation systems this summer. Just under 50 per cent of the vegetable area (including strawberries and melons) had an irrigation system in 2023. As studies on climate change have shown, dry and hot summers are predicted for the Mediterranean region and the Balkans in the future. For this reason, producers are already being advised to invest in irrigation systems in order to avoid such crop losses in the future.

Serbia remains one of the world's most important producers and exporters of raspberries for the frozen food industry, achieving far higher prices than its competitors Poland and Ukraine. With the stronger performance of Ukraine, prices have come under pressure in recent years and led to uneconomical prices in 2022 and 2023. Before the start of the 2024 season, an agreement on a minimum price was reached between producers, processors and the ministry to ensure that production remains profitable in the future. In addition to raspberries, Serbia has found another mainstay in the export of fresh blueberries. After strong area growth, the production potential is 20,000 tonnes, of which 70 per cent is exported and 15 per cent is sold domestically and to the processing industry.

The export of fresh and frozen fruit plays a far more important role for Serbia than that of vegetables. In terms of fresh fruit sales, exports to Saudi Arabia and the United Arab Emirates were recently expanded. Russia remained the main customer in 2023 with a share of just under 30 per cent. Frozen fruit, on the other hand, is mainly sold to the EU.

Due to the smaller harvests, Serbia had to reduce its export activities in the fruit and vegetable segment again in 2024 and was expected to sell less abroad year on year. Within Europe, traded fruit and vegetables rose in price due to the smaller harvests. The foreign trade balance slipped into negative numbers for both fruit and vegetables.



PRODUCTION

VOLUME ('000 tonnes)				
FRESH FRUIT	2021	2022	2023	2024p
Apples	513	486	380	389
Plums	413	489	363	387
Melons	145	184	160	165
Sour cherries	155	164	145	137
Raspberries	111	116	99	94
Pears	56	60	48	40
Apricots	31	44	29	35
Peaches	31	32	31	30
Blackberries	31	32	31	30
Other	112	121	120	120
TOTAL	1,598	1,728	1,406	1,427

FRESH VEGETABLES				
	2021	2022	2023	2024p
Brassicas	185	165	159	140
Peppers	148	144	119	115
Tomatoes	135	148	114	110
Carrots	55	52	44	40
Cucumbers	29	31	30	30
Leguminous crops	33	30	28	25
Onions	37	35	28	25
Other	29	28	25	25
TOTAL	651	619	547	510

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

IMPORTS

VOLUME ('000 tonnes)				
FRESH FRUIT	2021	2022	2023	2024p
Bananas	94	80	76	75
Oranges	44	40	41	40
Apples	21	37	22	30
Easy peelers	35	31	30	30
Other	107	87	96	95
TOTAL	301	275	265	270

FRESH VEGETABLES				
	2021	2022	2023	2024p
Tomatoes	36	29	35	35
Brassicas	14	14	13	15
Peppers	13	10	14	15
Other	39	36	49	50
TOTAL	102	89	111	115

EXPORTS

VOLUME ('000 tonnes)				
FRESH FRUIT	2021	2022	2023	2024p
Apples	180	148	129	130
Plums	24	25	17	15
Peaches, Nectarines	18	15	13	15
Cherries	12	14	10	10
Blueberries	4	5	6	5
Other	30	37	35	25
TOTAL	272	245	210	200

FRESH VEGETABLES				
	2021	2022	2023	2024p
Onions	15	28	22	20
Carrots	19	18	20	20
Cucumbers/Gherkins	28	18	17	15
Tomatoes	7	8	9	10
Peppers	10	9	5	5
Other	24	22	20	20
TOTAL	103	103	93	90

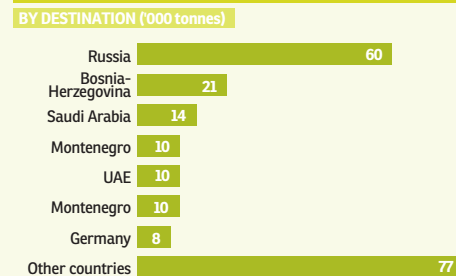
FROZEN PRODUCTS				
	2021	2022	2023	2024p
Raspberries	98	67	72	70
Sour cherries	31	35	33	30
Blackberries	32	23	19	20
Other	53	51	53	50
Vegetables	48	48	31	30

TRADE BALANCE

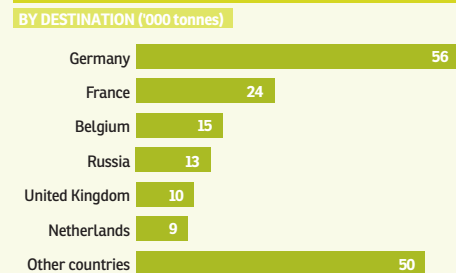
VALUE (million euros)				
FRESH FRUITS	2021	2022	2023	2024p
Import	216	231	254	281
Export	248	268	253	258
TRADE BALANCE	-7	+6	-1	-23

FRESH VEGETABLES				
	2021	2022	2023	2024p
Import	82	99	123	136
Export	44	48	60	61
TRADE BALANCE	-38	-51	-63	-75

FRESH FRUIT EXPORTS 2023



FROZEN FRUIT EXPORTS 2023





Population
68.8 m



Area
244,400 km²



GDP per Inhabitant
47,424 EUR



GDP Growth
0.3 per cent



Unemployment
4.1 per cent



CPI for Food
(2015=100)
128.6

UNITED KINGDOM

By May 2023, there was a food shortage in the UK and prices rose to record levels. The cold spring and, above all, the wet autumn in that year meant that large stocks of many vegetables could not be stored. In addition, with the exception of beans and baby leaf, areas were cut back. For fruit cultivation, which harvests earlier in the year, it was an average year. The area planted with berries was expanded, while the area planted with stonefruit, apples and pears was reduced.

The UK started 2024 with only a moderate supply of fruit and vegetables, while the wet and cold spring also delayed the planting of new sets of many vegetables. As in the previous year, the area for horticulture was further restricted in 2024. A total area of 142,000ha was cultivated for horticultural crops in 2024. This corre-

sponds to an area decrease of 2 per cent compared to the previous year. Of this area, 89 per cent was used to grow fruit and vegetables. Vegetables and lettuce accounted for 68 per cent and fruit for 21 per cent. With a decline of 6.8 per cent to just under 20,000ha, the percentage loss was greatest for fruit trees. The area under vegetables fell by 3.5 per cent, which represents a loss of almost 3,500ha. For berries and wine, the area did not change compared to the previous year and has remained relatively stable at around 10,000ha since 2010. The area under glass increased by 1.1 per cent to 2,600ha.

New import fees and controls known as the Border Target Operating Model (BTOM) came into force at the beginning of May, making foreign trade even more difficult. The main points of criticism from British producers were the delays and inadequate quality assurance. As with seasonal labour, there are concerns that suppliers will be less inclined to deliver to the UK as a result of this additional effort.

All in all, therefore, rather unfavourable conditions to support self-sufficiency. As a small ray of hope, inflation fell steadily in 2024 and stood at 3.2 per cent in October and was even lower for food. Nevertheless, in a survey conducted in summer 2024, the Food Foundation found that 13.6 per cent of households in the UK were affected by moderate or severe food insecurity. Only 12 per cent of children and young people aged between 8 and 18 consumed the daily recommended amount of fruit and vegetables. Fruit and vegetable consumption is at its lowest level for 50 years. No matter how low demand is, the UK is reliant on imports to meet it. In 2023, the UK produced 53 per cent of its own vegetables and 16 per cent of the fruit it consumed. As these figures have only changed slightly since Brexit, it can be assumed that they will be similar in 2024.

The apple harvest is expected to be 16 per cent higher than in 2023, although the 2022 figure will not be reached. Due to the mild weather and a good water supply, the apples have grown particularly large this year. The internal quality is good, with only external blemishes due to hail damage and early russetting.

In the case of onions, growers fear that Fusarium infections could mean that only 70 per cent of the quantities in storage could be sold.



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT ¹	2021	2022	2023	2024p
Apples	189	216	168	186
Strawberries	115	119	106	103
Pears	19	18	16	18
Blackcurrants	13	15	15	17
Raspberries	16	16	16	16
Blueberries	4	5	5	5
Plums	4	6	5	4
Cherries	4	4	5	4
Other	213	264	249	221
TOTAL	577	663	585	574

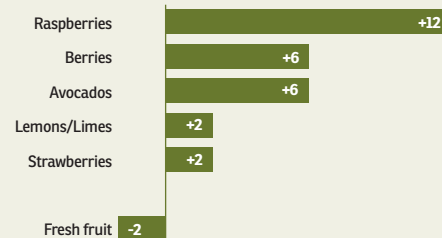
FRESH VEGETABLES ²	2021	2022	2023	2024p
Carrots	797	784	734	658
Onions	392	319	296	318
Peas ³	176	161	156	159
Cabbage	151	135	128	97
Lettuce	103	98	93	94
Turnips/Swedes	92	90	89	86
Mushrooms	86	84	80	81
Cauliflower	93	79	71	79
Broccoli	78	67	63	66
Parsnips	74	72	63	63
Other	506	441	443	452
TOTAL	2,548	2,330	2,216	2,153

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

Sources: AMI-informiert.de; Defra; Euronion, Eurostat, WAPA

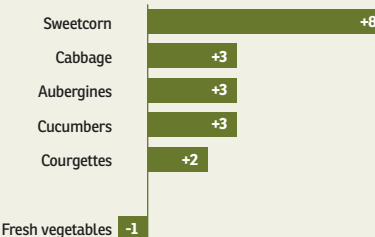
TOP 5 FRESH FRUIT IMPORTS

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



TOP 5 FRESH VEGETABLE IMPORTS

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



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Bananas	948	885	881	850
Apples	327	322	285	310
Melons	282	301	282	289
Table grapes	269	272	259	265
Easy peelers	286	293	297	263
Oranges	246	252	211	218
Lemons/Limes	147	147	149	147
Avocados	114	116	120	125
Pineapples	120	112	110	102
Other	588	577	554	581
TOTAL	3,327	3,277	3,148	3,150

FRESH VEGETABLES ¹	2021	2022	2023	2024p
Tomatoes	335	385	369	361
Onions	296	369	386	348
Peppers	191	218	210	217
Cucumbers	169	201	181	198
Lettuce	202	133	125	158
Cauliflower/Broccoli	103	130	145	120
Mushrooms	106	98	96	99
Sweetcorn	58	57	64	70
Other	518	454	485	476
TOTAL	1,978	2,044	2,061	2,047

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2021	2022	2023	2024p
Avocados	7	8	10	10
Apples	11	11	9	9
Table grapes	3	2	2	2
Other	16	17	15	13
TOTAL	37	38	36	34

FRESH VEGETABLES	2021	2022	2023	2024p
Carrots/Turnips	8	13	12	10
Mushrooms	9	10	9	9
Cauliflower/Broccoli	6	6	7	6
Other	46	67	47	48
TOTAL	69	96	75	73

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2021	2022	2023	2024p
Import	4,341	4,519	4,860	5,050
Export	73	74	84	82
TRADE BALANCE	-4,268	-4,445	-4,776	-4,968

FRESH VEGETABLES	2021	2022	2023	2024p
Import	2,756	3,180	3,736	3,530
Export	85	99	98	98
TRADE BALANCE	-2,671	-3,081	-3,638	-3,432

FRUIT LOGISTICA

WORLD



FRUIT LOGISTICA

Berlin

Every February

fruitlogistica.com



ASIA



ASIA FRUIT LOGISTICA

Hong Kong

Every September

asiafruitlogistica.com



Published by FRUIT LOGISTICA

Produced by

AMI Agrarmarkt Informations-GmbH

FRUIT LOGISTICA

Messe Berlin GmbH

Messedamm 22 | 14055 Berlin | Germany

Tel +49(0)30-3038-0

fruitlogistica@messe-berlin.de

www.fruitlogistica.com

Hong Kong 3|4|5 Sep 2025

ASIA FRUIT LOGISTICA

Asia's fresh produce trading hub

BOOK
YOUR STAND
NOW

Knowledge Partner

ASIAFRUIT



asiafruitlogistica.com

Berlin 4|5|6 Feb 2026

fruitlogistica.com

LET'S GROW!

Innovation. Interaction. Inspiration.

**FRUIT
LOGISTICA**

The leading trade show for the
global fresh produce business.

SAVE THE DATE
TODAY FOR
TOMORROW:
4|5|6 Feb 2026

FRUITNET

**MESSE
BERLIN**