
Future trends in fresh produce supply

An in-depth look at emerging sources and new trade patterns in fruit and vegetables



Contents

Thanks for reading this **FRUIT LOGISTICA Trend Report**. The international trade in fresh fruit and vegetables is now worth in excess of US\$230bn. Remarkably, it's a business that involves practically every single country of the world, and in today's divided world, it is amazing to think that certain products have more or less universal relevance. Yes, it's true that a lot of fresh produce trade flows and supply lines are entrenched; countries deal with others based on historical connections, cultural affinities, and of course geographical proximity. But our report shows there is also plenty of scope for greater interaction. New demand in items such as avocados and berries, for example, has opened the door to growth in markets that were previously out of reach. And elsewhere, seismic shifts – Russia's questionable geopolitics, or the construction of a huge railway from Laos to China – have transformed the business. We hope you enjoy reading this special report, and we look forward to seeing you at FRUIT LOGISTICA in Berlin on 5-7 February 2025.

Mike Knowles

Managing Director · Fruitnet Europe

Contributors

Adam Formica
Yevgen Kuzin
Antonio Lizano
Wayne Prowse
Oleksandr Ukrainets
Cindy van Rijswijk
Andriy Yarmak

Associate editors

Wayne Prowse
Andriy Yarmak

Publishing partners

Fruitnet
EastFruit
RaboResearch

Destination growth	3
Global trends in fresh produce.	
Rising stars	7
New supply in key categories.	
Costly exercise	11
Tough trading conditions for vegetables.	
Winners' circle	14
The trade's movers and shakers.	
Club Med	17
Emerging sources look to Europe.	
Treasure trove	21
Morocco continues to impress.	
Premium progress	23
Egypt's great export expectations.	
Against the odds	25
Ukraine finds a way to trade.	
Central role	29
Will China follow Russia's lead?	
Durian domination	31
Asia's astounding expansion.	
Green lime for go	33
Latin America's latest squeeze.	
What if...?	35
Signs of a potential new trend.	

Future trends in fresh produce supply

Published by
FRUIT LOGISTICA

Produced by
Fruitnet Media International
The Food Exchange
New Covent Garden Market
London SW8 5EL
United Kingdom
www.fruitnet.com

Editor
Mike Knowles, Fruitnet

About Fruitnet
Fruitnet is the leading publisher and congress organiser for the global fruit and vegetable business. It provides information, insight and ideas to help the fresh produce business grow.

Copyright © 2025
Fruitnet Media International
All rights reserved. Publication or reuse of all or part of this report is expressly forbidden without prior written permission. It has been produced using external sources we believe to be accurate. We do not accept liability for any error or omission.

Destination growth



Cindy van Rijswick
Global Strategist, Fresh Produce
Rabobank Research Food & Agribusiness

The past few years have been anything but boring for the global fruit and vegetable business. The Covid-19 pandemic, extreme weather events, skyrocketing costs for growers, challenging logistics, and geopolitical tensions are just some of the factors it has had to worry about. In this challenging environment, leading players like Spain, the US, China and the Netherlands have been happy to consolidate their positions.

But it's also true that some countries – among them Mexico, Thailand, Peru, Turkey, Morocco and Egypt – have all grown their share of the global market, driven either by their favourable production circumstances, geographical location, or a strong increase in demand for certain imported fruits and vegetables.

No matter what happens, the worlds' desire for imported fruits will not stop, not even in large, rather mature markets such as North America and Europe. However, the key trend as we head into 2025 is that traditional mainstream fruits like bananas and apples are increasingly accompanied by berries and tropical fruits in the global fruit basket (Figure 1).

Figure 1

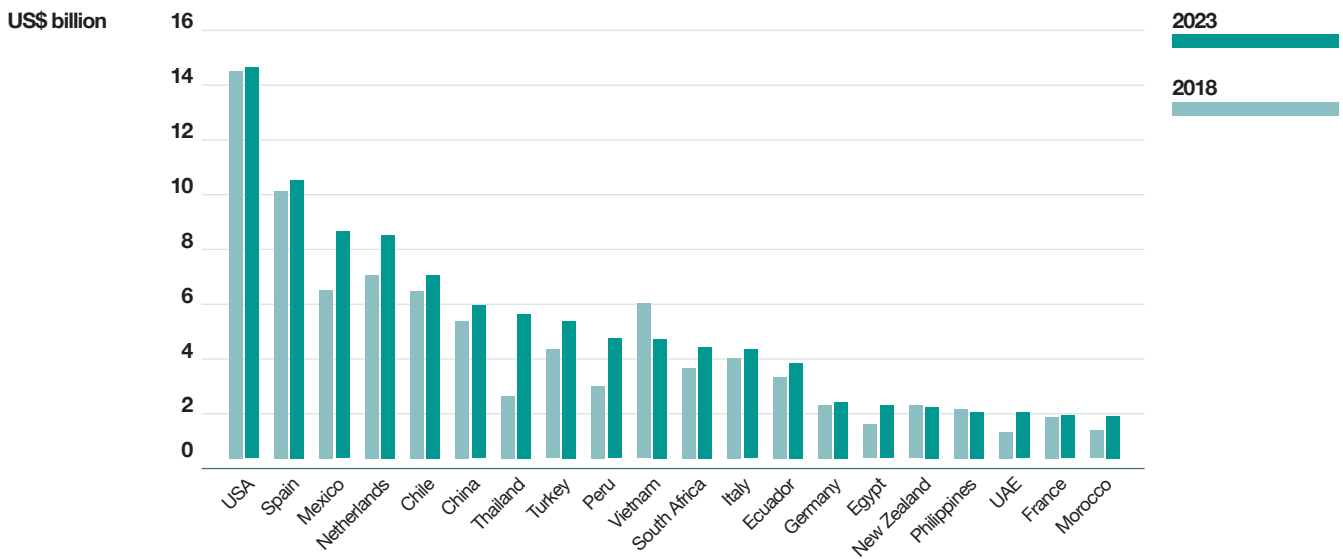
Share of globally traded fresh fruit volume, 2023



Source: RaboResearch, TradeMap

Fresh fruits are traded far more widely across the globe than fresh vegetables. In 2023, the total global trade in fresh fruit and nuts was estimated at roughly US\$130bn. That was only about 8 per cent more than in 2018, but, as this report will show, there have been more dramatic changes beneath the surface during that time. Change has also seemed slow in terms of the fruit categories being traded and the nations exporting those products. Bananas, for example, still account for the largest share in global fruit trade volume, followed by citrus and apples. At first glance, it would appear that not much has really changed as far as the largest export and import nations are concerned. (Figures 2 and 4).

Figure 2 Top 20 fresh fruit and nut exporters

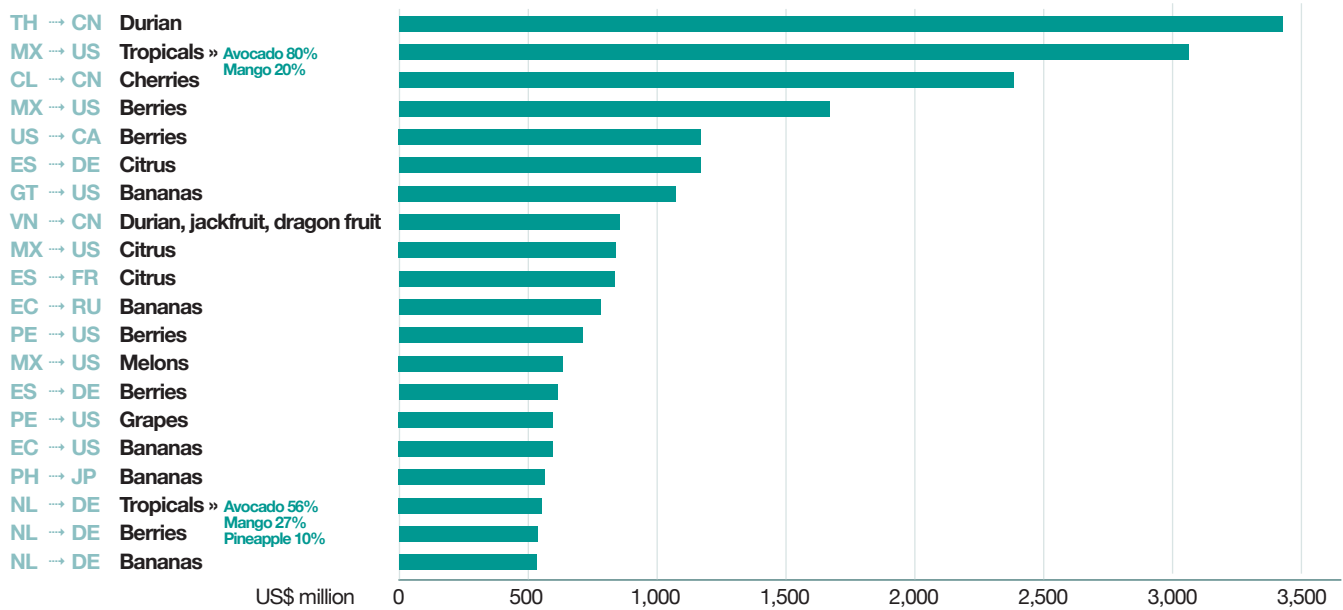


Source: RaboResearch, UN Comtrade. NB data include total fresh fruit and nut exports under HS code 08. Export volumes from USA include a relatively high share of tree nuts.

On closer inspection, however, there are some remarkable new trends. One seemingly small change involves large volumes of produce, and that's Mexico's rise up the ranking. Demand for avocados and berries in the US has driven growth in its southern neighbour's production and exports. Similarly, Peru has greatly increased its exports of berries, avocados, and table grapes to Europe and the US. And another interesting and noticeable change is Thailand's rapid ascent, a trend mainly fuelled by China's craving for durian. In fact, on the strength of that one demand spike alone, the durian trade from Thailand to China has become the single-largest of all fresh fruit trade flows worldwide in terms of value (Figure 3). In just five years, the value of Thailand's fruit export sales have overtaken those of Italy, Ecuador, South Africa, Vietnam, Peru, and Turkey.

Figure 3

Top 20 fresh fruit export flows



Source: RaboResearch, UN Comtrade. NB Four-digit trade codes used for fruit (excluding nuts). Tropicals include avocado, mango, pineapples, guava, figs and dates. Where 2023 was unavailable, some 2022 data was used.

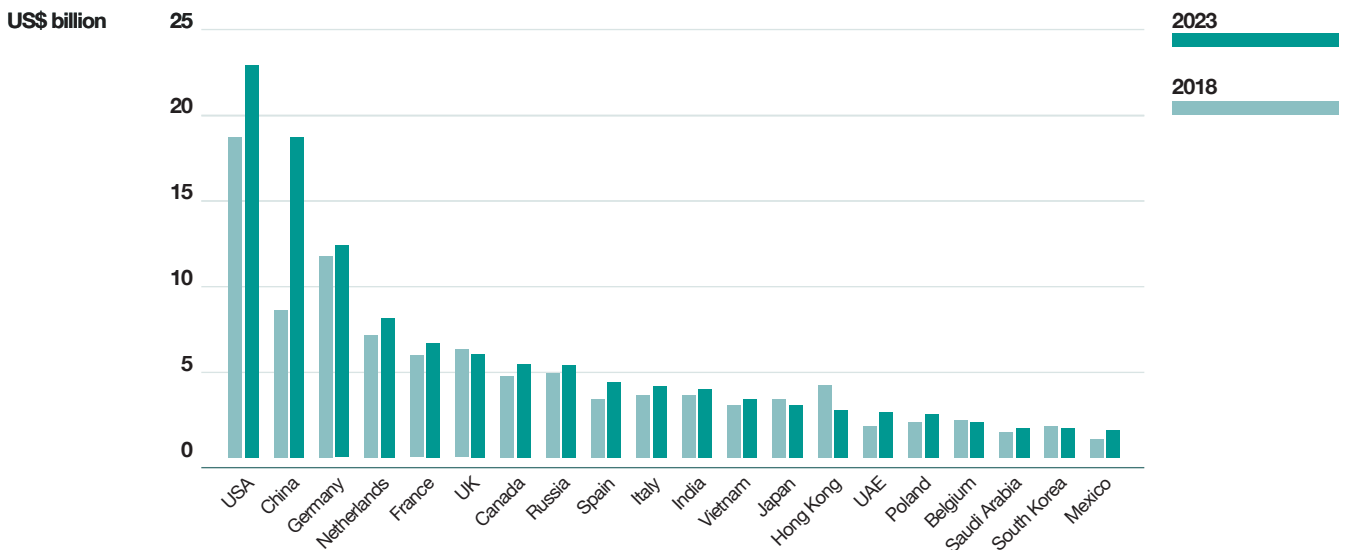
A comparison of fresh fruit trade flows in terms of value rather than volume shows the growing importance of relatively high-value fruit categories like berries, tropical fruits, and cherries to the global fruit trade. Cherries exported from Chile to China, for example, are now worth almost US\$2.3bn per year. Compare that to the value of citrus fruit shipped from Spain to Germany – only US\$1.16bn – and the bananas shipped from Guatemala to the US – less than half at US\$1.07bn – and it is clear something rather dramatic has occurred.

Closer to Europe, Turkey and Egypt do yet match the giant trade flows seen out of Latin America countries, but these countries' growth in percentage terms is considerably high, for both fruit and vegetable exports. What has propelled their expansion? Certainly it has to do with their favourable production circumstances, relatively low costs, and strategic location close to Europe, the Middle East and Central Asia. In the meantime, the Netherlands and the United Arab Emirates have both strengthened their positions as trade hubs for Europe and the Middle East respectively.

For Europe itself, we expect a continuation of the status quo. European countries will continue to rely on imports of tropical and off-season products. This applies mainly to fruit and remains a source of commercial opportunities for overseas suppliers. By contrast, the majority of vegetables consumed in Europe will continue to be grown within the continent itself, and shipped from, and to, neighbouring countries.

There will be exceptions though, for example in products like sweet potato, ginger, and garlic. Against the background of a slow growing and ageing population, stricter regulation and sustainability requirements, as well as increasing costs for labour, land and other inputs, the volume of fresh fruit and vegetables produced within Europe will be stagnant to declining. But because consumer preferences are moving to higher-value products, and because of the increased cost and risk in production and international trade, the total value of both production and consumption is going to move to even more elevated levels. But to answer the question of where the volume growth is to be found, this will not be in good old Europe. ●

Figure 4 Top 20 fresh fruit and nut importers



Source: RaboResearch, UN Comtrade. NB data include total fresh fruit and nut exports under HS code 08. Import volumes from India include a relatively high share of tree nuts.

Rising stars



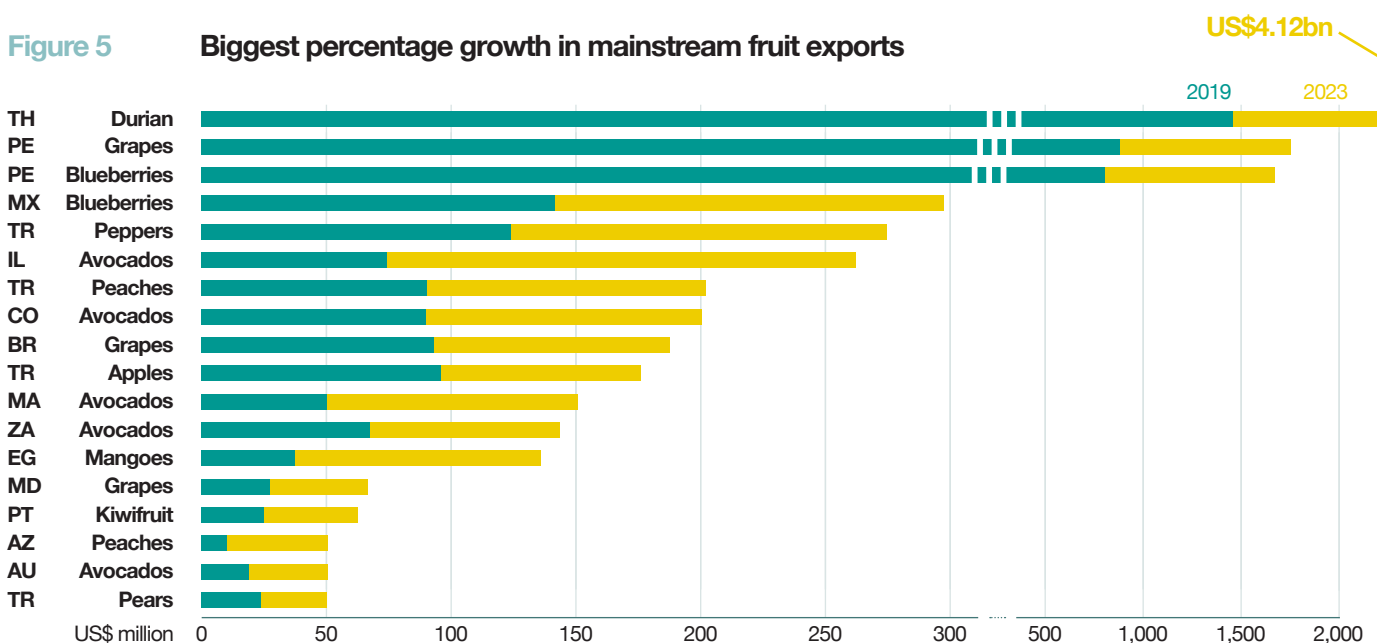
Mike Knowles
 Managing Director
 Fruitnet Europe

There is plenty of growth in parts of the global fruit trade, and figures for 2019-2023 give us a good idea of where that growth is happening. No surprise that some of the biggest exporters have found ways to expand further. But interestingly, countries with smaller export footprints have stepped up investment in more promising products, ventured into new markets, or indeed done both. Moldova is a perfect example: in grapes, apples and stonefruit, it has diversified its market portfolio and seen phenomenal expansion, albeit with a smaller volume than many.

Among the more established fruit trades – which, in Figure 5, are limited to those worth more than US\$50m per year – the broadest international growth opportunities appear to be in berries, avocados, and grapes. Peru leads the expansion in two of those categories over the past five years: in that time, the values of its grape and blueberry exports have both more or less doubled, to US\$1.75bn (+99 per cent) and US\$1.68bn (+1104 per cent) respectively. And that growth has come all over the world. For blueberries, UN Comtrade data for 2019-2023 show Peru's exports rose dramatically to Russia (+1,630 per cent), Hong Kong (+363 per cent), US (+117 per cent), Netherlands (+96 per cent), and China (+83 per cent). Its grape sales to Mexico (+340 per cent), Spain (+163 per cent), Canada (+121 per cent), the US (+117 per cent), China (+72 per cent), and the Netherlands (+70 per cent) also soared. Note also the stunning growth for Thai durian – for more on that, see p31.

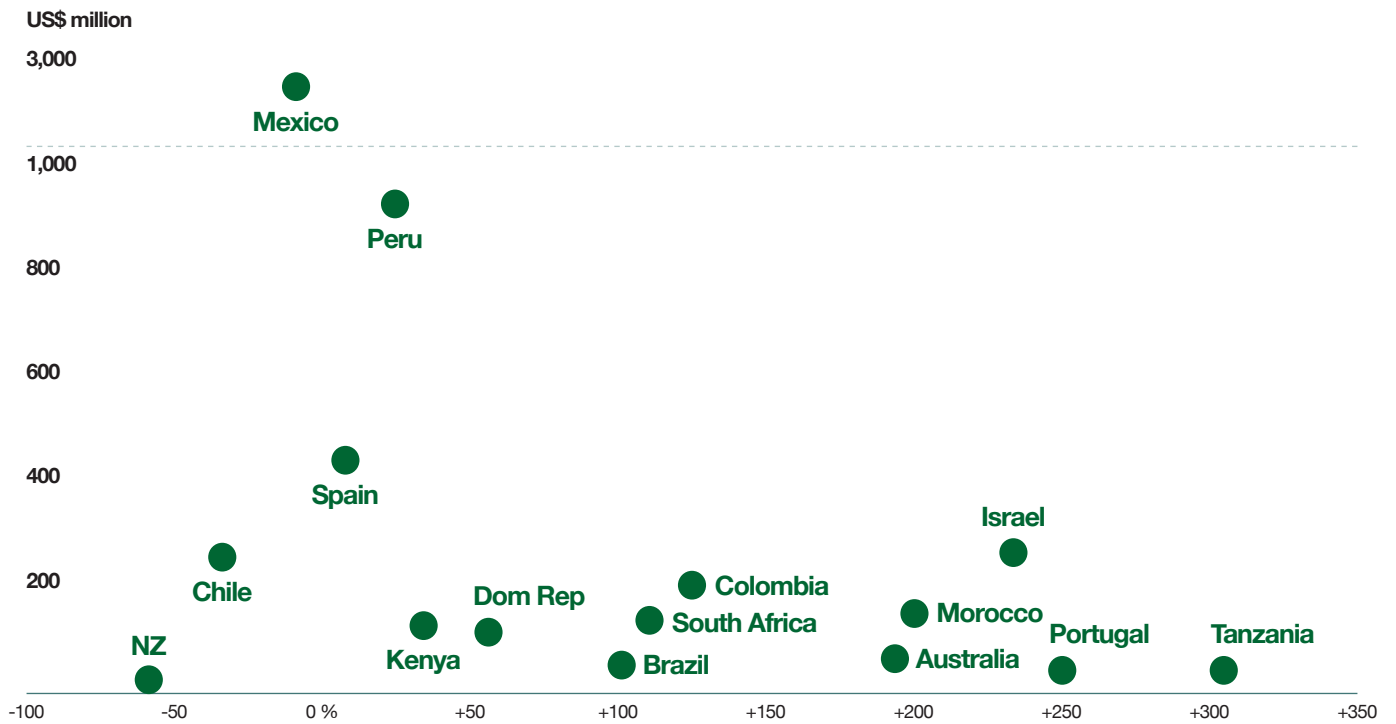
Figure 5

Biggest percentage growth in mainstream fruit exports



Source: UN Comtrade. NB Chart limited to trades worth in excess of US\$50mn per annum.

Figure 6 Avocado export value and growth, 2019-2023

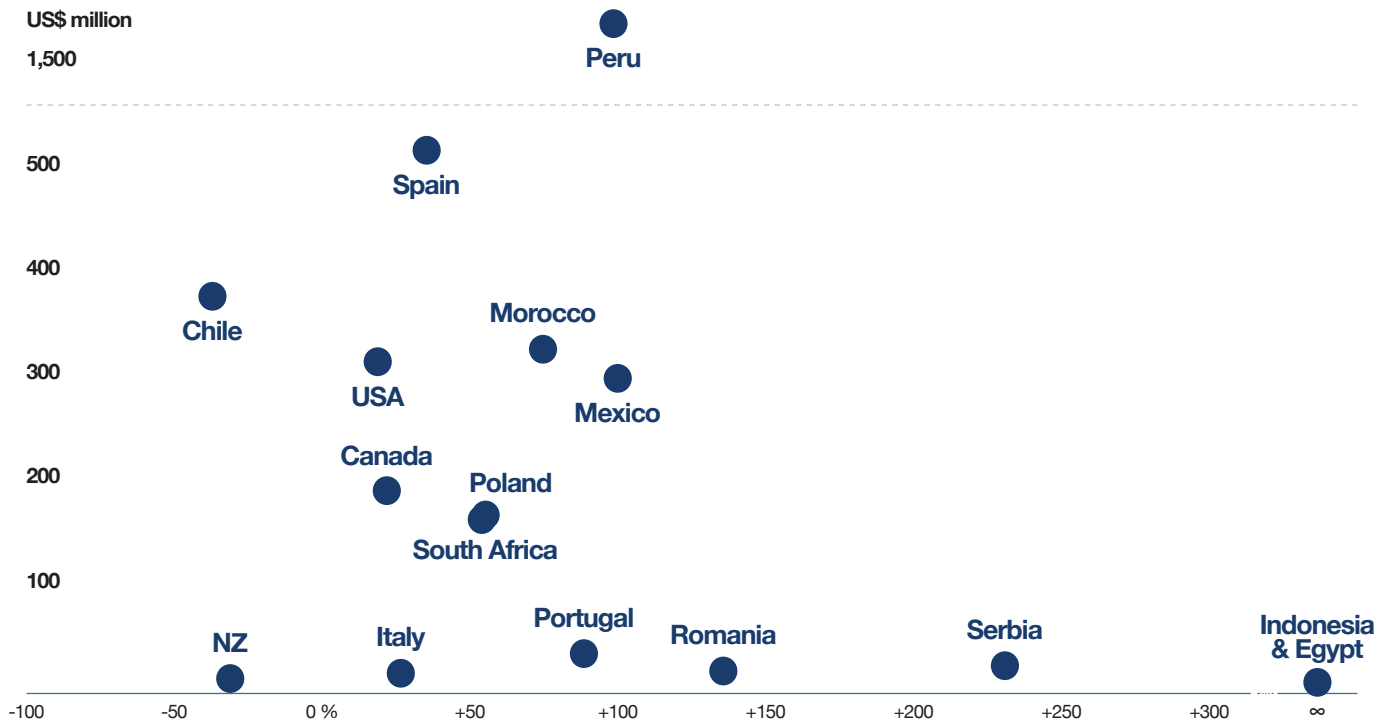


Source: UN Comtrade

Avocado exports might not be expanding at such a major rate for Peru these days (only 28 per cent higher in 2019-2023, although still incredible at almost US\$1bn), but the fruit certainly looks like an extremely promising future investment for several countries, not least Israel, Colombia, Morocco, South Africa, Australia, Portugal, Tanzania and Brazil – all of whom at least doubled their export sales in that same period. Israel in particular has registered an impressive increase of 239 per cent, and overtook Chile's avocado export earnings with US\$260.8mn in 2023. *Figure 6* shows how dominant Mexico and Peru are. And it illustrates just how crowded and competitive the race to catch them up – and capitalise on growing global demand – is going to be in the next few years.

Turkey, which appears three times in *Figure 5*, has built a lot of new business for its fresh fruit in Russia. It now sells significantly more to the country than it did in 2019, buoyed by greater demand for its avocados (US\$5.86mn, +2,846 per cent), apples (US\$24.1mn, +335 per cent), kiwifruit (US\$3.5mn, +323 per cent), peaches (US\$143.9mn, +91 per cent), apricots (US\$32.0mn, +72 per cent), and pears (US\$14.1mn, +61 per cent). In the meantime, its apple exports have also risen thanks in part to a 286 per cent increase in sales to India.

Figure 7 Blueberry export value and growth, 2019-2023



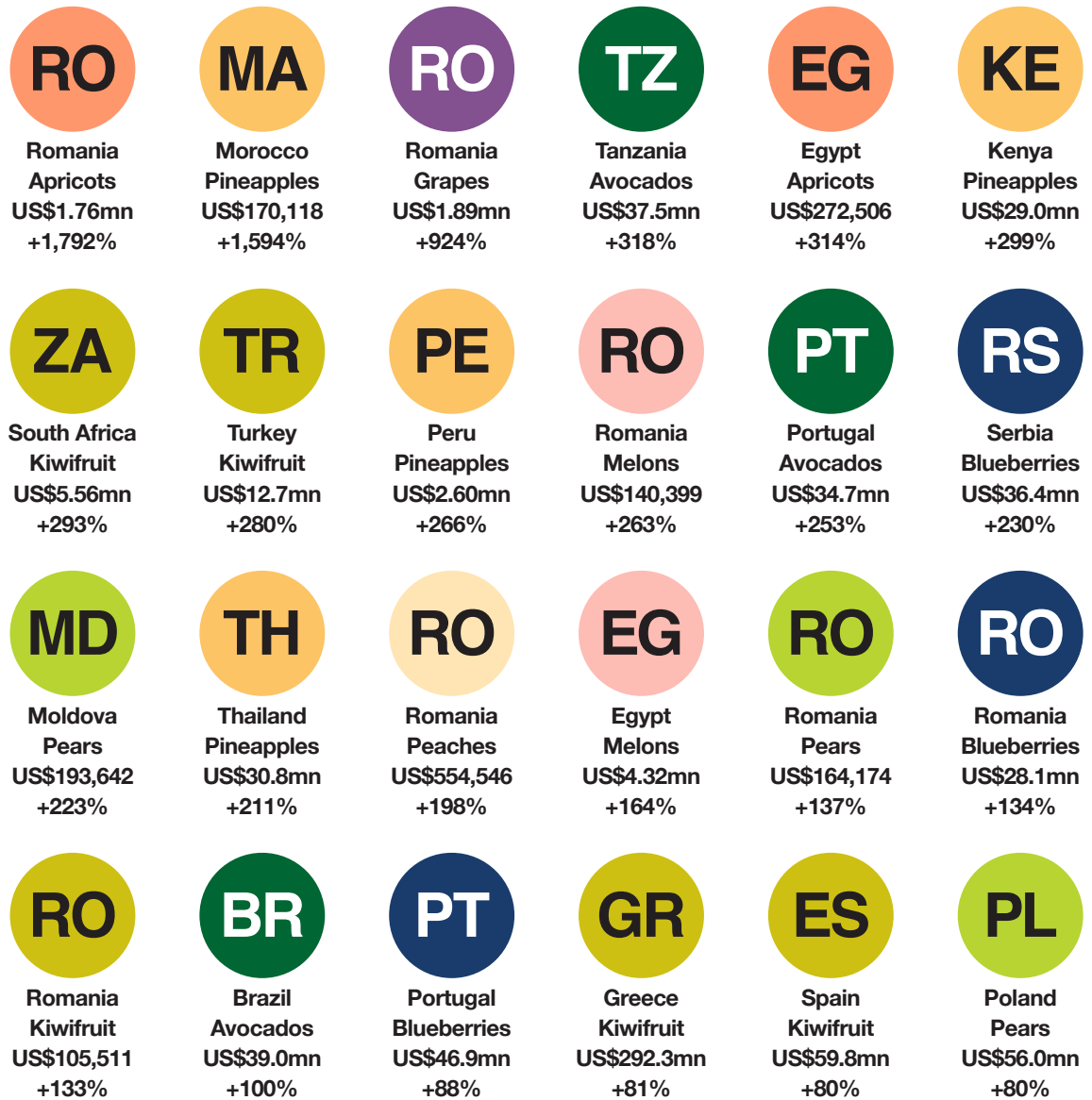
Source: UN Comtrade

The rate of new plantings in blueberries worldwide suggests there is more to come from this product too. Mexico and Peru have expanded their sales the most, but as *Figure 7* shows, they are not the only ones. New production in countries such as India, China, Indonesia, Portugal, Romania, Serbia, Egypt, and South Africa is expected to bring even more volume to a market where demand continues to rise, and for many of these countries the question will be whether they have the right varieties to suit. Nations like Morocco and Poland will face stiffer competition as those new suppliers try to secure their own slice of the pie.

Over the page, *Figure 8* gives you more of an indication as to where the rising stars of the fresh produce market might emerge. Romania in particular seems to have plenty of potential, and now generates much bigger export returns from its apricots, grapes, melons, peaches, pears, blueberries, and kiwifruit than it did half a decade ago. In Europe, Greece, Spain and maybe even Turkey seem set to grab some of the kiwifruit market that Italy has lost as a result of the diseases Psa and moria, which have hit production of Hayward hard. One possible question mark over that prospective growth will be whether or not New Zealand marketer Zespri can secure permission from its domestic shareholders to plant 2,500 hectares more in Italy, France, Greece, and Japan; if it does, it will be in a better position to supply kiwifruit year-round and so its branding power should have a positive effect on demand across the whole category. ●

Figure 8

Export growth rising stars, 2019-2023



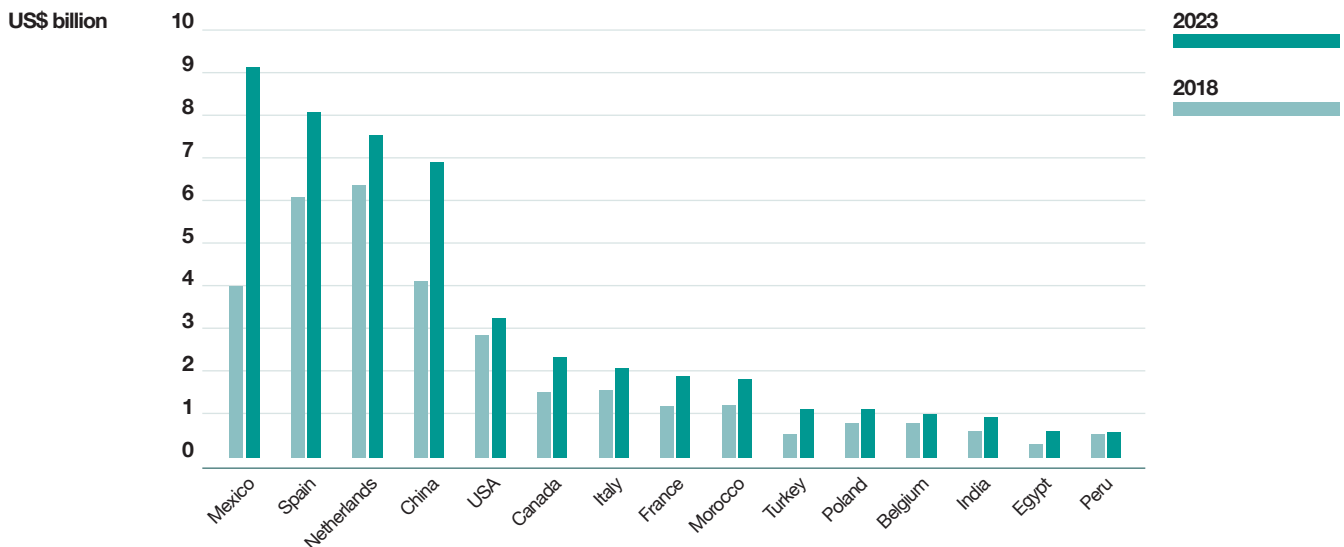
Source: UN Comtrade.

Costly exercise



Cindy van Rijswick
Global Strategist, Fresh Produce
Rabobank Research Food & Agribusiness

Figure 9 Top 15 fresh vegetable exporters



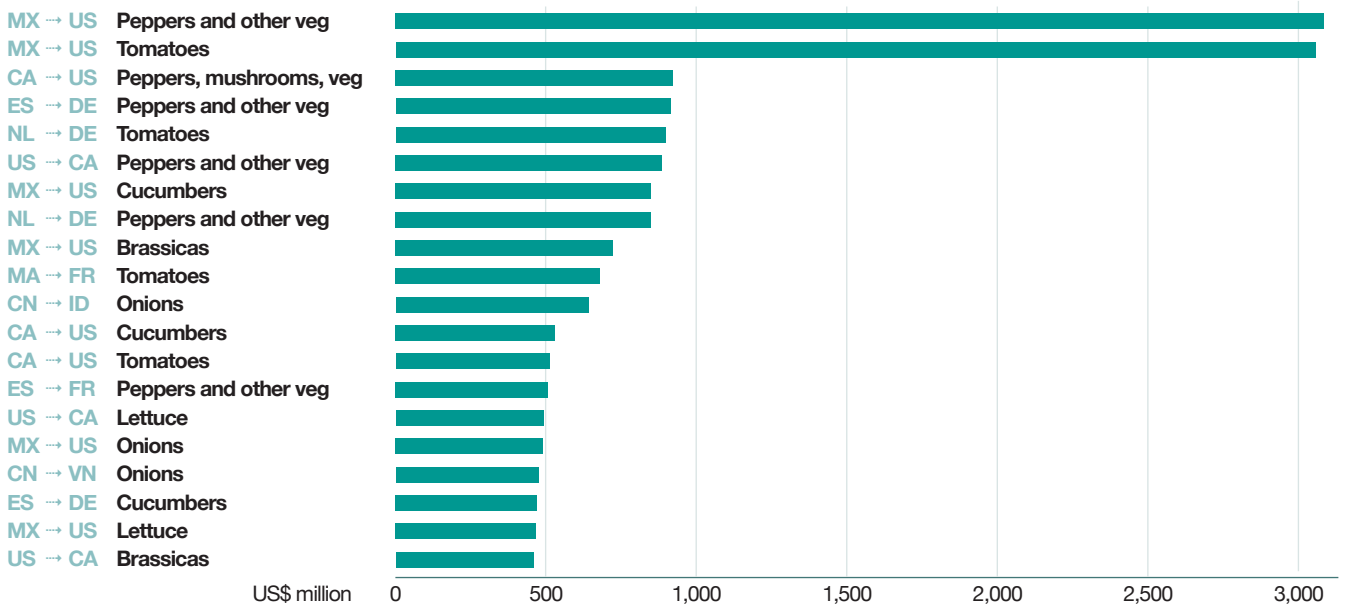
Source: RaboResearch, UN Comtrade. NB data include fresh vegetable exports included under HS codes 0702-0709. These exclude potatoes and processed vegetables.

Between 2018 and 2023, the global trade in fresh vegetables grew by roughly a quarter, to nearly US\$90bn. This might seem like a major increase, but given the inflationary environment the world economy experienced during much of that time, it means there has been very little growth in terms of the actual volume of produce traded. For the two largest suppliers, Mexico and Spain, it was an opportunity to consolidate their positions as the fruit and vegetable gardens of North America and Europe respectively (Figure 9).

The advance of Mexico is remarkable, in particular for fresh vegetables. In 2018-2023, it more than doubled its fresh vegetable export value. Nearly all of its fruit and vegetable exports go to the US, and around 40 per cent of US vegetable supply is imported, mainly from its southern neighbour. Notably, the world's three largest trade flows in fresh vegetables all involve the US as the destination country (Figure 10). The world's single largest vegetable trade is tomatoes from Mexico to the US, a product flow that exceeded the two billion-kilo mark for the first time in 2023.

Figure 10

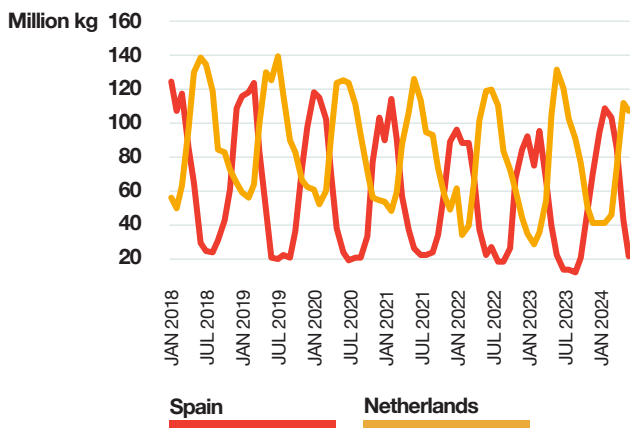
Top 20 fresh vegetable export flows



Source: RaboResearch, UN Comtrade. NB trade flows analysed include fresh vegetables specified to four-digit code. Category 'other vegetables' includes peppers, mushrooms, aubergines, asparagus, artichokes, celery and pumpkins. Peppers include fruits of the capsicum or pimenta genus.

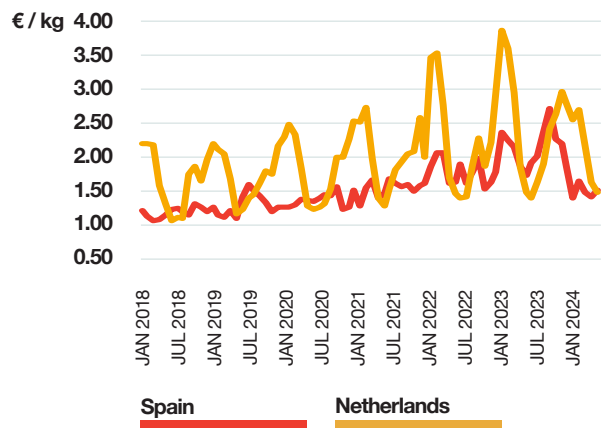
Greenhouse-grown vegetables like tomatoes, peppers, and cucumbers have for a long time been among the main vegetables traded within the EU, as Figure 10 also illustrates. Recently, we have seen some changes in the origin countries and also in the type of vegetables grown and traded. Growth in exports from the two dominant greenhouse vegetable exporters – Spain and the Netherlands – has levelled off and even declined for crops like tomatoes. Skyrocketing prices for natural gas in 2022-2023 had inflated the cost of production in heated glasshouses, and this resulted in decreased exports from the Netherlands, mainly in winter time (Figure 11a). Spain was unable to take advantage of this situation, as Spanish tomato exports in the winter season have also decreased over the last six seasons.

Figure 11a Fresh tomato export volume



Source: RaboResearch, Eurostat

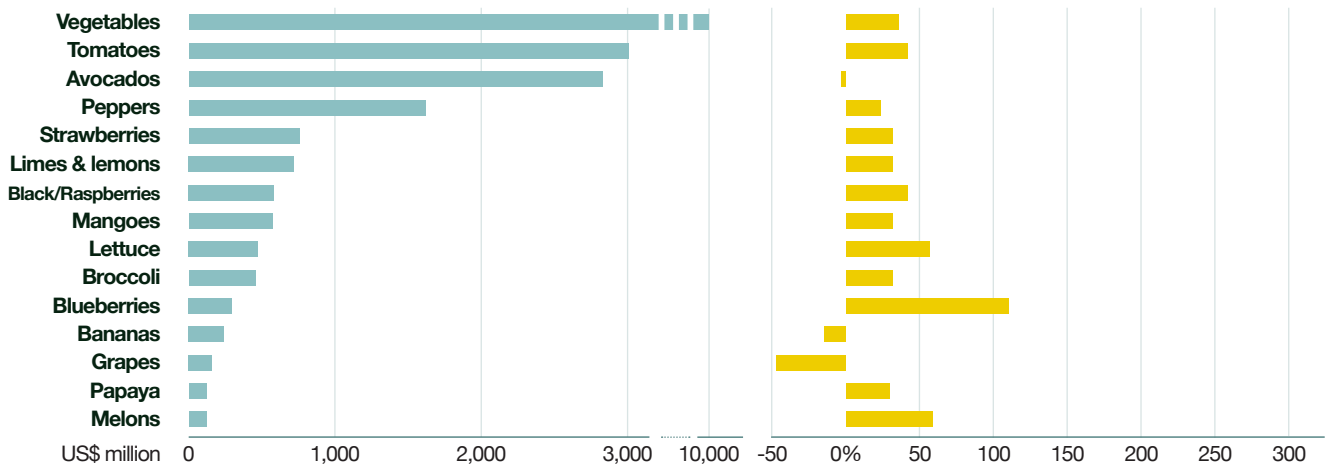
Figure 11b Fresh tomato export value



Source: RaboResearch, Eurostat

Various factors have contributed to this decrease, not only for tomatoes but also for most other vegetables. One challenge specific to tomato production is ToBRFV, a virus that has had a devastating impact on tomato production around the world. Other more common factors include labour availability and cost, extreme weather events, water supply, and energy prices. In the meantime, Morocco's tomato exporters have gained some market share in the UK and the EU over the past years, but in 2023 they also faced challenges from extreme weather and ToBRFV. With suppliers in nearly all production countries beset by various difficulties, prices have moved up and this at least has compensated for some of the industry's big cost increases (Figure 11b).

Figure 12 Mexico export growth, 2019-2023

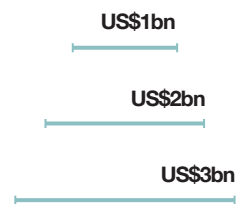


Source: UN Comtrade

Winners' circle



Cindy van Rijswick
Global Strategist, Fresh Produce
Rabobank Research Food & Agribusiness



Durian is the surprise winner at the top of our list of fresh fruits and vegetable that showed the biggest increase in export value over the last five years. Exports of the exotic fruit were worth US\$4.8bn in 2023, which is a staggering US\$3.2bn more than they were in 2018. Put another way, that's average value growth of 24.8 per cent a year. Thailand has been the beneficiary of nearly all this increased business, and incredibly its growth has pretty much all been in China, where it ships more than 80 per cent of its exports.



Blueberries are the second-ranked fruit in our top ten export value winners, after they showed a strong increase in sales during 2018-2023. In 2023, the value of the global blueberry trade was US\$2bn more compared with 2018, based on average annual growth of 10.7 per cent. Peru alone accounted for US\$1.1bn of that increase, despite the negative effects of El Niño on its production in late 2023. A large cohort of other countries saw a surge in their own blueberry sales too, including Mexico and Morocco.



Tomatoes take third position in our ranking. In value terms, they remain among the most-traded fresh produce items, just after bananas and before grapes. While bananas have shown modest annual growth of 1.1 per cent, the tomato trade has kept up a relatively fast 3.7 per cent annual expansion rate. Tomato export volumes have not increased, so this reflects a strong increase in prices as well as a shift towards higher-value but smaller tomato types. Mexico accounts for almost 44 per cent of the global tomato trade's expansion since 2018, while Morocco, Turkey and Canada have also shown strong increases. The US now depends even more on Mexico and Canada for its imports. Turkey, meanwhile, has developed a diversified portfolio of export markets in and outside the European Union, including Romania, Ukraine, Poland, Germany, Bulgaria, Russia and a large number of others. Morocco, by contrast, depends on the UK and EU markets, where it sells a large volume of small-sized snack tomatoes that require a lot of harvesting labour.



Making up the rest of our export value growth top ten are **avocados, peppers, onions, easy peelers, cherries, cucumbers, and strawberries**. For all fresh fruit and vegetables, a proportion of any export gains can be attributed to an increase in unit value (price per kilo), and part of it to an increase in volume. For all of the fruits and vegetables listed in this particular 2018-2023 ranking, export prices have increased during that period, all except for avocado. For that reason, when it comes to the real volume traded, we can argue that avocados are the true winner. ●

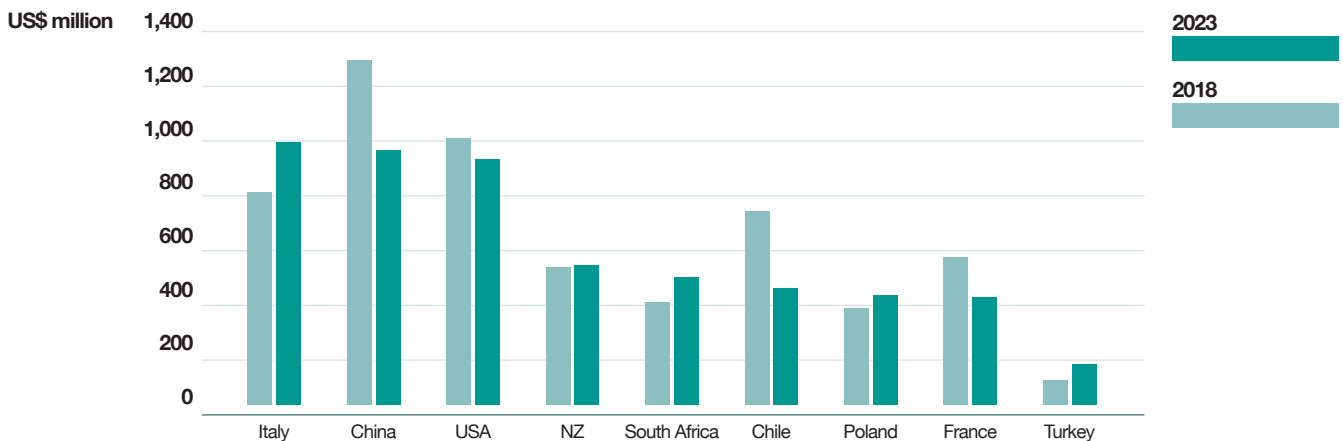


Source: RaboResearch, UN Comtrade, FAO. NB fruits and vegetables specified up to six-digit trade code level

A hard road ahead for some...

Some of the international fresh produce trade's all-time favourites are losing ground. This is no surprise, given the markets for these commodities are relatively mature. Among the most noticeable products to have fallen into this trap are apples and oranges, the two world's most traded products by volume. Global apple trade decreased by 1 per cent a year on average in value terms, and 2 per cent a year in volume terms, from 2018 to 2023 (Figure 13). China and Chile are among the countries that accounted for a large share of this decrease. New Zealand did keep its export revenues at a similar level comparing 2023 to 2018, but the amount it sent overseas was 16 per cent lower. There are lots of different explanations for the international apple trade downturn: pressure on grower margins is high, shipping costs relative to product value have also increased, consumption is stagnant, and there has been a shift towards more domestically focused production – supported by varieties that can be stored for longer.

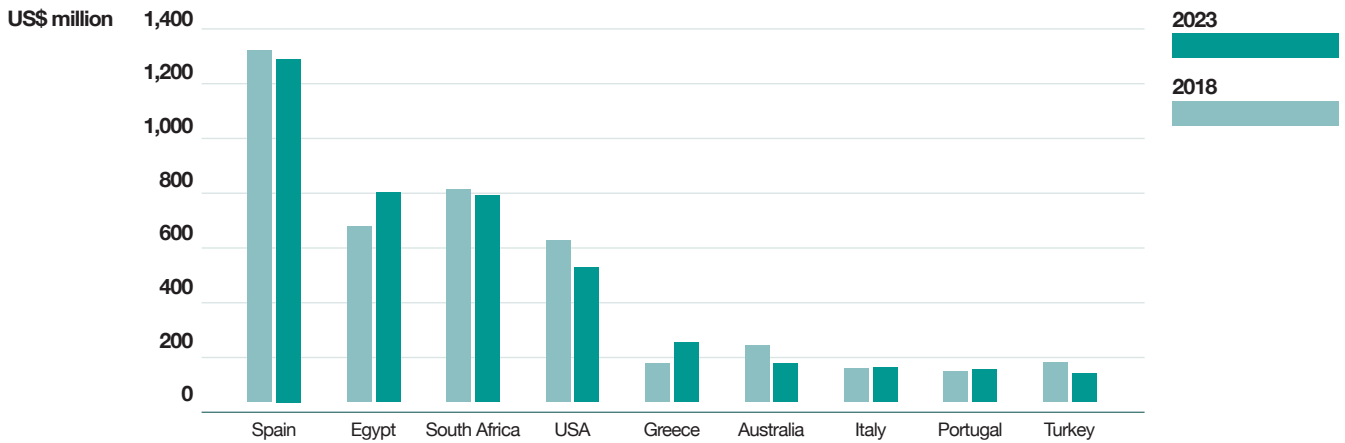
Figure 13 Apple exports from selected countries



Source: RaboResearch, UN Comtrade. NB data include largest apple exporters, exclude trade hubs, eg. Netherlands.

Another mainstream product that has to deal with some of the same trade issues as apples – margin pressure, lack of market growth – is oranges. In 2023, global exports of the fruit were 1.3bn kilos fewer than five years earlier. Orange prices have risen since 2020, a trend driven more recently by a smaller harvest in Brazil that has left the juicing market especially short. As a result, the trade value loss was *only* US\$200mn. Nearly all of the leading countries saw their exports go down, with the exception of Egypt and Greece (Figure 14). Turkey's strong decline in 2023 is likely a one-off result caused by adverse weather conditions that affected that year's harvest. But over the years, orange production and exports have been extremely unpredictable and volatile, not only in Turkey but also in other countries. The decrease in exports from the US is one of the most noticeable trends, and this has largely been caused by citrus greening and adverse weather in Florida. On the other side of the country, California's orange production has been much more stable over the years.

Figure 14 Fresh orange exports from selected countries



Source: RaboResearch, UN Comtrade. NB data include largest orange exporters, exclude trade hubs, eg. Netherlands.

Looking forward, we can likely expect a further decline or stabilisation of consumption and trade of these traditional products. But that's not to say there won't be any commercial success within those categories – rather, growers will continue to place more emphasis on the production of better-quality and higher-value products, instead of just increasing their volumes of the more commoditised products. Success will depend on two things: access to the right varieties, most likely via commercial licences; and greater invention in terms of how those products are merchandised and marketed. ●

Club Med



Wayne Prowse
Senior Analyst
Fresh Intelligence

Figure 15

Exports of key products to EU & UK by supplier in 2023 (tonnes)

	Morocco	Turkey	Egypt	Israel	Total	5yr CAGR %	2023 share %
Citrus	156,213	282,744	228,744	157,109	824,810	3	47
Melons	296,579	82,497	958	59	380,093	12	22
Berries	115,777	5,753	13,934	—	135,464	8	8
Avocados	46,484	193	106	71,252	118,035	37	7
Table grapes	4,799	27,304	70,094	1	102,198	-2	6
Stonefruit	3,165	41,255	406	—	44,826	37	3
Cherries	—	46,485	—	—	46,485	6	3
Mangoes	—	273	3,154	5,239	8,666	-13	0
Other	6,380	84,395	1,283	3,665	96,173	6	5
Total	629,847	570,899	318,679	237,325	1,756,750	6	100
Five-year CAGR %	3	10	7	8	6		
2023 share %	36	32	18	14	100		

Source: Fresh Intelligence, ITC TradeMap

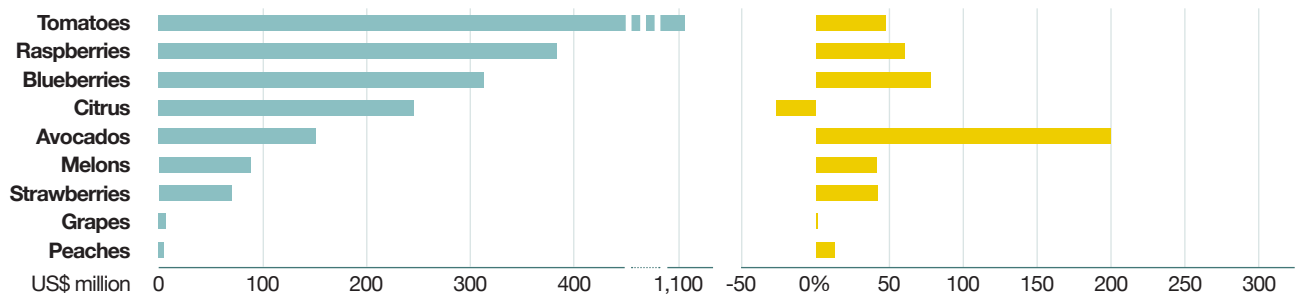
Countries in the Middle East and North Africa, or MENA for short, look set to play an increasingly important role in Europe's fruit market. The region, which broadly covers those countries along the Mediterranean Sea's southern and eastern coastlines, features a diverse array of economic, political, and social conditions. And with a young and increasingly educated population, better access to cheaper labour, and a geographical position that offers potential access to large markets in Europe, the opportunity is great. In fresh fruit and vegetables, countries like Egypt, Israel, Morocco, and Turkey have already started to exploit these comparative advantages.

Together, those four countries account for 97 per cent of the area's fresh fruit exports to Europe. As Figure 15 shows, annual growth of 6 per cent in the past five years has pushed that volume above 1.75mn tonnes. Collectively, citrus and melons lead the way and account for the bulk of fruit exports from the four nations. Each produces a large amount of citrus, a category where cost advantages can be beneficial given the international market is not expanding. And it's clear that berries and avocados – two categories with excellent market growth prospects – are going to account for a significant share of the region's exports to Europe in the next few years.

Morocco

The closest of our Club Med quartet to western Europe, Morocco is the continent's largest non-EU supplier. In 2023, the EU27 and the UK accounted for 65 per cent of Morocco's total fresh fruit exports – almost 630,000 tonnes led by melons, mandarins, berries and avocados. Russia, North America, and other markets in Africa accounted for the remaining 35 per cent. Although 2023 was not a good year, Morocco has increased its fruit exports by around 6 per cent a year in the past five years (see next chapter). But a couple of difficult production years more recently have seen trade with Europe fall by 13 per cent. Citrus exports were 21 per cent lower – including a severe 87 per cent fall in orange volumes to 6,300 tonnes, the lowest level in decades. Melon exports to Europe were 11 per cent down at 296,000 tonnes, but in the past five years they have increased by an average 12 per cent per year, and that export trade did peak at 331,000 tonnes in 2022. Similarly, avocado exports to Europe were almost 54,000 tonnes in 2022, over half the country's production, before they fell 14 per cent to 46,000 tonnes. The rapid decline in exports of products including oranges is a concern for those who source from Morocco, and they will be wary of recent adverse weather conditions returning, notably the increased intensity of drought periods and critically high temperatures.

Figure 16 Morocco export growth, 2019-2023

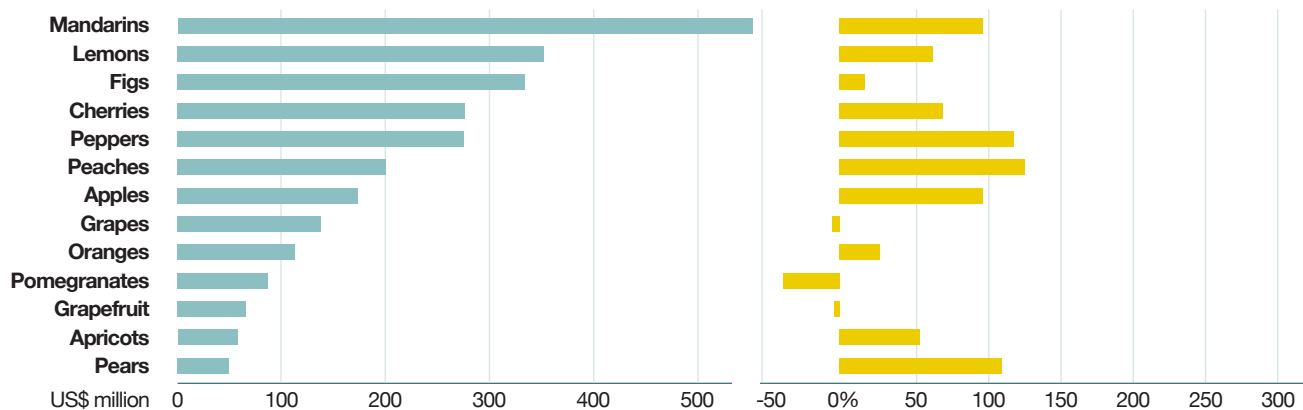


Source: UN Comtrade

Turkey

In the past, Turkey has been known primarily as a citrus exporter. More recently though, it has grown to become one of the largest fresh produce exporters in the MENA region. And it has reaped a bumper export revenue harvest that now exceeds US\$2.3bn a year. Turkey is certainly a potential powerhouse in fruit supply. Its annual production is around 25mn tonnes according to the FAO, with apples, grapes and watermelons making up half. In 2023, the country exported 3.3mn tonnes of fresh fruit, including 570,900 tonnes to Europe (EU27 plus UK), which was 17 per cent of total exports. Other non-EU markets also figure prominently. Russia is the largest export destination, taking over 1.1mn tonnes in 2023, but in recent years Turkey's geographic location has helped it to export more to India, other parts of Asia, and throughout the Middle East.

Figure 17 Turkey export growth, 2019-2023



Source: UN Comtrade, Produce Report, EIB

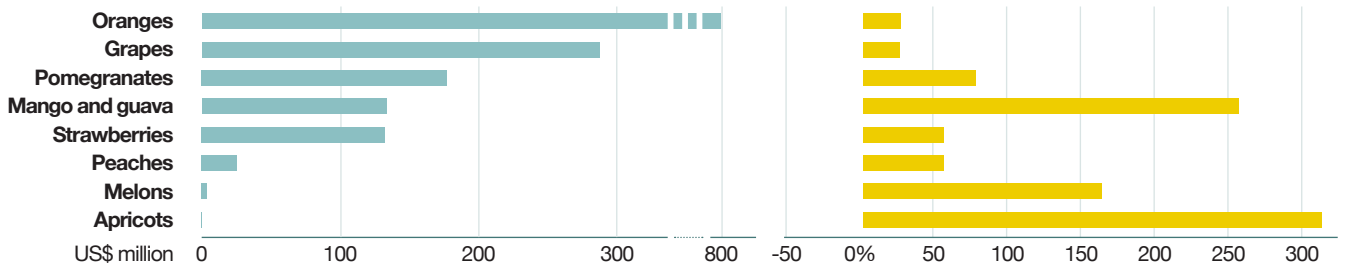
Half of Turkey's fruit exports to Europe are citrus (282,000 tonnes), led by lemons and mandarins. Melons, mostly watermelons, account for 14 per cent. And after years of sustained growth, the country is now the world's largest producer of cherries – it exported 46,485 tonnes (8 per cent of Turkish exports) to Europe in 2023. Although apples are the Turkey's largest fruit crop by volume, only around 5,000 tonnes were shipped to Europe, compared with 125,000 tonnes to India. Overall, its CAGR for fresh fruit exports to Europe stands at 10 per cent, but it was double that figure in 2023 – the highest growth rate among all MENA exporters to Europe during the last five years.

Egypt

Citrus production in Egypt is approaching 5mn tonnes, according to FAO data. That makes up 40 per cent of the country's total fruit production (around 12mn tonnes), ahead of grapes, bananas, and melons. There is potential to sell more of that fruit abroad. Although citrus makes up almost three-quarters of Egypt's fruit sales to the EU and UK, only 229,000 tonnes went to those European markets in 2023. But those exports were 35 per cent up in just one year, and 11 per cent higher on average over the previous five years, as production and supply in other countries has stagnated or declined. Oranges dominate, making up 85 per cent of all Egyptian citrus exports.

In 2023, Egypt exported 318,679 tonnes of fresh fruit to the EU and UK, or 29 per cent of its total exports. And that trade has grown 7 per cent per year over the period 2018-2023, with a 26 per cent year-on-year increase in 2023. Egypt is also a major supplier of fresh fruit to other markets within MENA and Asia, including Saudi Arabia, Russia, United Arab Emirates and India. Table grapes account for a further 22 per cent of its export trade, and sales were up marginally in 2023, by 3 per cent to 70,000 tonnes. But it was a challenging season for producers, and overall trade decreased.

Figure 18 Egypt export growth, 2019-2023

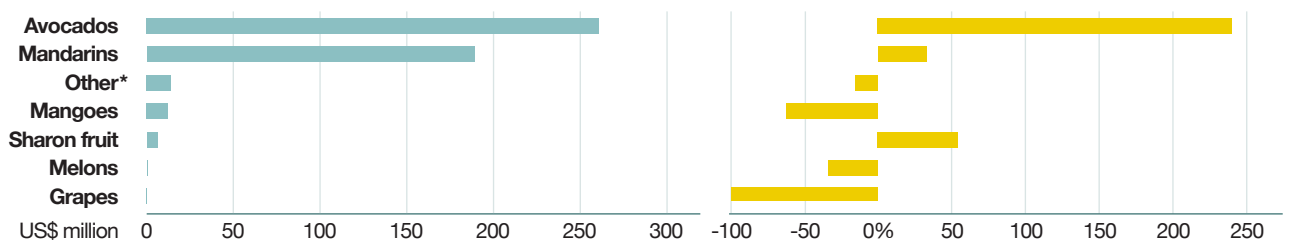


Source: UN Comtrade, Produce Report

Israel

Israel is renowned for its citrus and avocado production. According to FAO data, the two categories account for 46 per cent of its total fruit production (around 1.4mn tonnes) and 96 per cent of its fruit exports to Europe (237,000 tonnes in 2023). That business in Europe was 36 per cent higher compared with the previous year, and around 70 per cent of its total fresh fruit exports. Russia, the US and Canada account for most of the remaining 30 per cent. Citrus, mostly mandarins, are the main product exported to Europe, and in 2023 the country increased those shipments by 23 per cent to 157,109 tonnes. But it was in avocados where growth was strongest, increasing 190 per cent to 71,252 tonnes according to UN Comtrade. Conflict in the region, in Gaza to the south and Lebanon to the north, is a major concern. Fruit production in southern Israel has been most affected by recent events, largely due to the impact it has had on access to farms, labour availability and safety concerns. That said, early data for 2024 does not indicate any decline in exports to Europe. ●

Figure 19 Israel export growth, 2019-2023



Source: UN Comtrade. *Other includes pomegranates and lychees

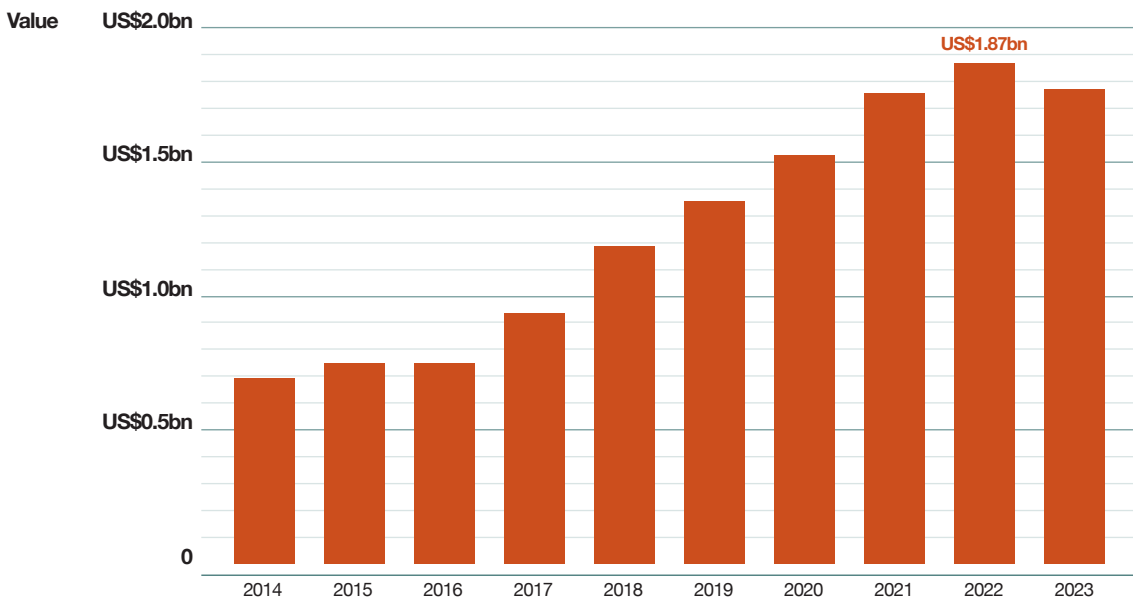
Treasure trove



Yevgen Kuzin
International Fresh Produce Analyst
Ukraine

Morocco's fresh produce export business has had an amazing journey in the past ten years. During that time, what was once a small pearl on the south-east corner of the Mediterranean has been transformed into a treasure trove for buyers of key products like tomatoes, citrus, and berries. As a result, it has seen a remarkable 146 per cent increase in its total fruit and vegetable exports to US\$3.3bn, making it the 16th-largest exporter globally. Morocco is also the third fastest-growing produce exporter among the top players, trailing only Peru and Thailand.

Figure 20 Evolution of Morocco fruit export sales



Source: UN Comtrade

Significantly, 88 per cent of Morocco's fruit and veg export revenues come from eight key crops, all of which have experienced substantial growth between 2014 and 2023. Over that decade, tomato exports have more than doubled, fresh raspberry exports are 11 times bigger, blueberries have increased tenfold, and easy peelers are up 50 per cent, with bell pepper volumes three times higher, melons up 70 per cent, watermelons eight times more, and avocados 1,200 per cent up.

In terms of destinations, the European Union and United Kingdom are the primary destinations for Moroccan fruits and vegetables, accounting for 81 per cent of the country's total exports. However, the country is looking to expand into new markets. Over the past decade, its exports to countries outside Europe and Africa have grown by 266 per cent, and now amount to US\$270mn.

Morocco has emerged as the world's leading supplier of easy peelers, the fourth-largest exporter of oranges, and the most significant non-American supplier of blueberries to Canada. In the Middle East, it ranks seventh in mandarin supply and third in imported fresh blueberries. In East Asia, it is the third-largest exporter of frozen strawberries to China and Japan. And Moroccan exporters have even extended their reach to Mongolia, where the country is the second-largest supplier of easy peelers, and Australia, where it has the fourth-biggest share of the market for imported frozen strawberries.

In south-east Asia, Morocco's key opportunities lie in mandarins and berries. Its mandarin season, which runs primarily from November to March, positions the country as almost the only premium-quality exporter to the region. And in fresh blueberries, Morocco has already tripled its exports to south-east Asia, to 1,500 tonnes between 2019 and 2023. That makes it the region's fifth-largest supplier despite the long distance.

In future, Morocco's export growth looks set to be driven by a commitment to high-quality produce and the proficiency of its exporters. Europe is obviously a market of paramount importance, but as demand for fresh berries and other premium products surges in Asia, the country is poised to capitalise on expanding consumer markets, robust economic growth, and a flourishing tourism industry across that part of the world too. This dynamic combination will pave the way for increased foreign trade and a stronger presence in Asian markets. In the meantime, it should strengthen its share of traditional markets where it has already gained a very good reputation. ●

Premium progress



Andriy Yarmak
International Agribusiness Analyst
Italy

Don't be surprised if you soon start to hear about Egypt as a key exporter of premium, speciality fruits and vegetables. Over the past five years (2019-2023), the country has become a global leader in terms of the relative pace of fruit and vegetable export growth. Each year, in fact, Egypt's export revenues from fresh produce have increased by an average of 11.7 per cent. That's a rate of expansion that surpasses Peru, which has an average annual growth of 10.5 per cent. So what is driving this impressive growth? And which products and segments are Egyptian companies focusing on?

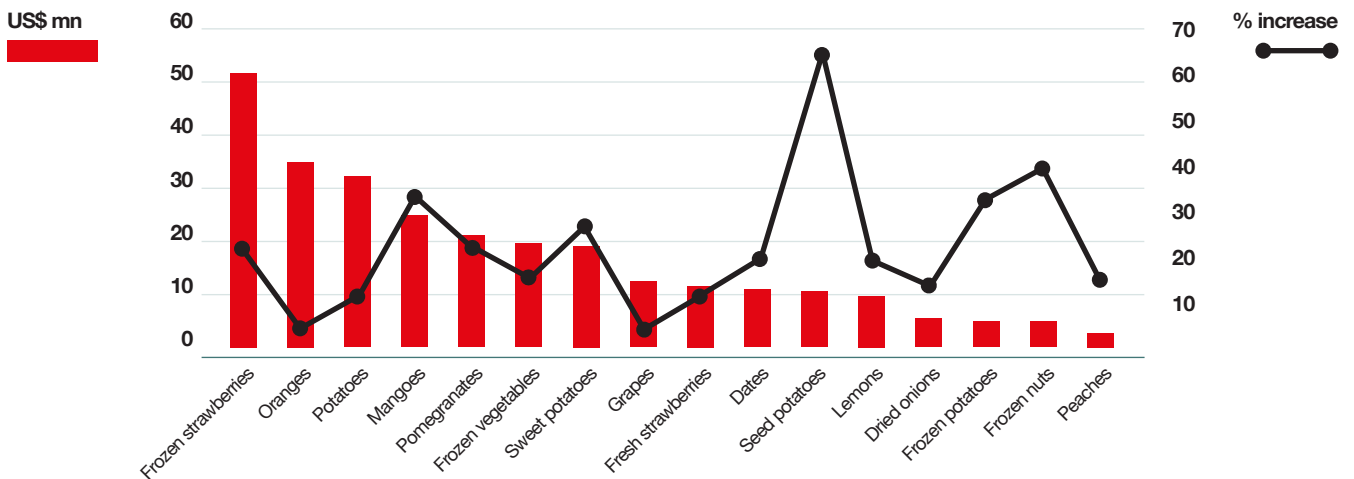
There is a perception in the market that Egypt is an exporter of reasonably priced fruits, and that this is a key reason behind its success. If we compare the country with Morocco, we see that this is partially true. Both countries earn similar amounts from their produce exports, but Egypt's export volumes are at least 50 per cent higher. That would indicate that the average price is much lower, but things are beginning to change. The higher-value categories are growing faster. Mangoes, for example, are Egypt's fastest-growing export category among its top five in terms of relative export growth. It is also developing exports of local perishable mango varieties by air. These are largely unknown outside the country, but could be highly prized by consumers due to their unique taste.

Egypt has also conquered the global market for frozen strawberries, which it now exports in large volumes to former global leader China. However, it is now developing fresh strawberry exports, which are much more valuable and making good progress.

While oranges remain the country's main fresh produce export – it has added revenue of more than US\$35mn each year in this category – growth is largely happening in the higher-value segment, with the EU emerging as the main destination for those premium products. The Red Sea crisis, meanwhile, has pushed Egypt to further upgrade its quality, to avoid losing newer and highly profitable markets in Asia.

Another noteworthy product category for the Egyptian fresh produce business is dates. With annual export growth already at 11 per cent a year, there has been a massive expansion in production of the most popular varieties, something that will likely reshape the global market within the next four to five years. The bulk of this new volume will be shipped to buyers in Asia.

Figure 20 Average annual growth in Egypt's exports



Source: East Fruit

Change of scene

Another key trend for Egypt can be seen in its export destinations, which have changed significantly. Exports to Russia – the main market for Egyptian produce – fell by a third in 2023, which meant Russia's share of total exports fell by more than 7 percentage points to only 12 per cent, the lowest on record. Despite the Red Sea blockade, that business has been replaced by increased export revenues elsewhere – notably in Spain, Italy, the Netherlands, and Poland. These countries offer very attractive import prices and timely payments, assuming quality requirements are met.

In other countries too, there has also been a rapid increase in demand for Egyptian exports – among them Iraq, Morocco, India, Germany, Greece, and Turkey. Sales of higher-quality fruit to Canada, South America, and the US have also increased sharply. And looking ahead, provided there are improvements in logistics arrangements, we can also expect renewed export growth for Egypt in Asia, which is the only region with sustainable import growth in fruits and vegetables. In conclusion, Egypt's quality upgrades and changing geographical focus are a sign that it is ready to target bigger rewards in markets with higher requirements. By expanding the variety of products it has available for export, that push for premium should see it enter more new markets. ●

Against the odds

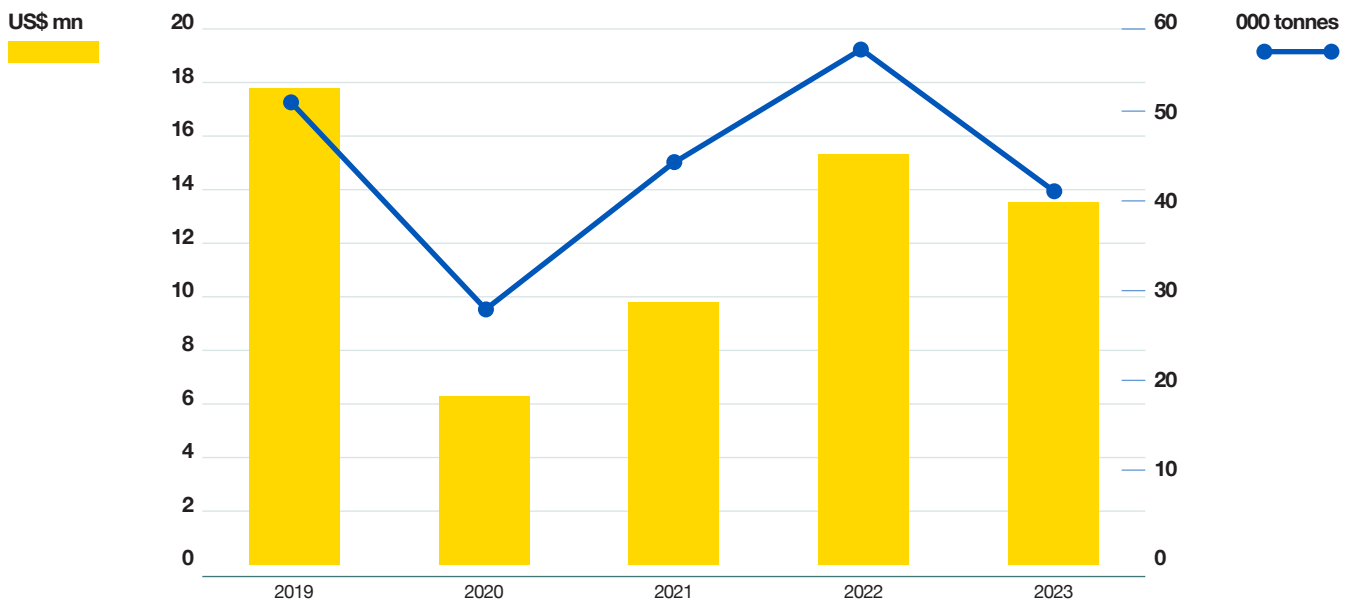


Oleksandr Ukrainets
Analyst
EastFruit

Ukraine, for reasons other than the obvious, is a country to keep an eye on. Against all odds, its fresh produce exports have increased in the past few years. Despite Russia's invasion, which has led to huge logistical difficulties, a lack of pickers and drivers, and border blockades, Ukrainian growers and traders have somehow managed to export more fresh fruit than they did previously. The situation is of course unprecedented. But the question is, how can it sustain that growth?

Figure 21

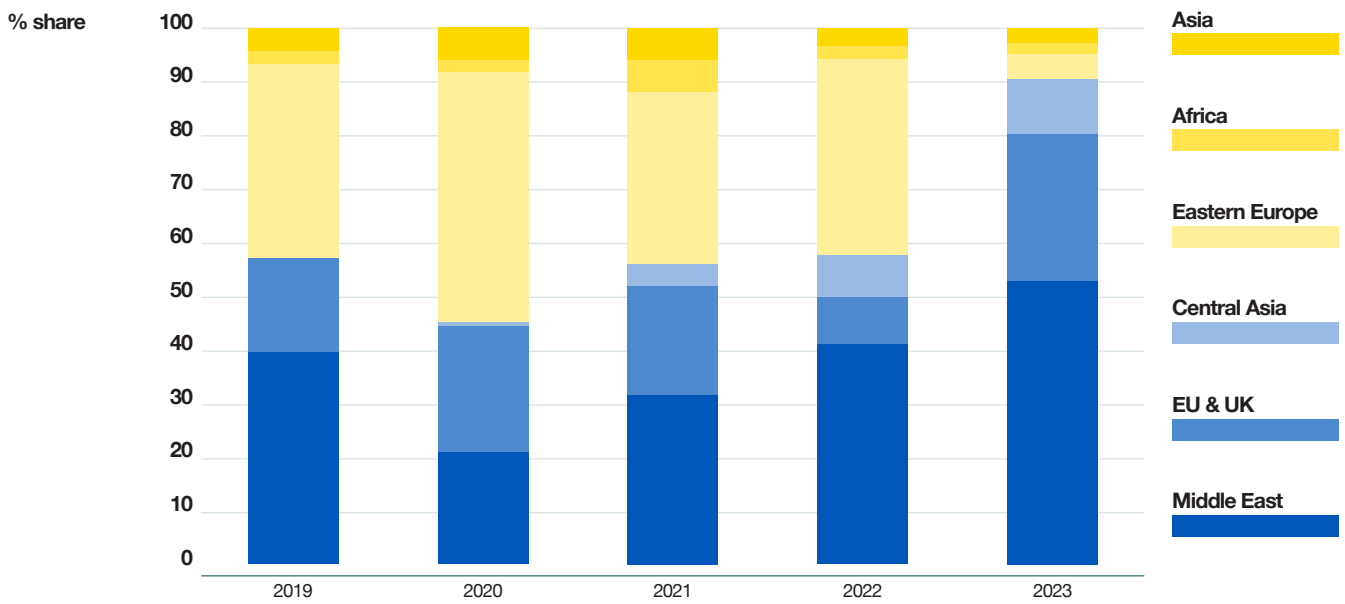
Fresh apple exports from Ukraine, volume and value



Source: East Fruit, Global Trade Tracker

According to Global Trade Tracker, export revenues from fresh and frozen fruit increased by 4 per cent in 2023 compared with the previous year, and by 12 per cent against 2021. The key export items are apples and blueberries in fresh, and raspberries and wild blueberries in frozen. In that same time, Ukraine also exported more than 40,000 tonnes of apples, 39.5 per cent more than it did in 2021, before the invasion. And although container traffic via Ukrainian ports was blocked until the middle of 2024 due to Russian attacks, the country did manage to keep its apple shipments moving, and exporting to more than 35 countries as far afield as south-east Asia and sub-Saharan Africa.

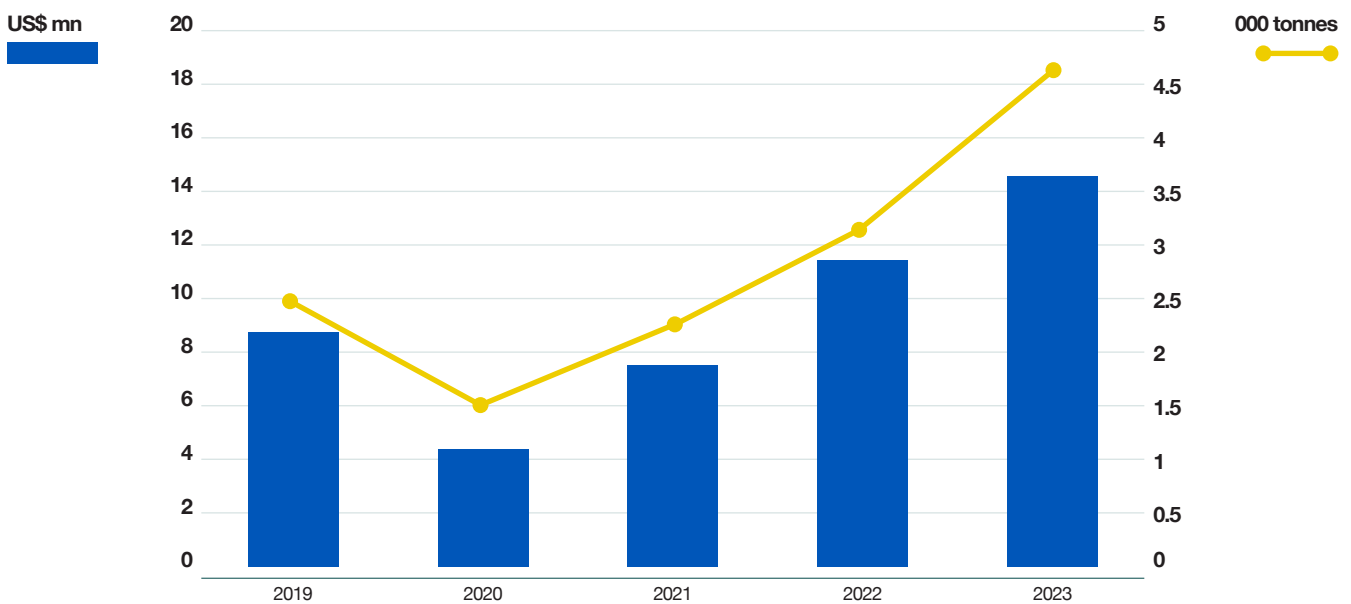
Figure 22 Destination markets for fresh apple exports from Ukraine



Source: East Fruit, Global Trade Tracker

UAE and Saudia Arabia remain the main destinations for Ukraine's apples, which go to several other countries in the Middle East. There has also been a steady increase in demand from Uzbekistan, the UK and the EU. Together, these accounted for more than 90 per cent of the country's apple exports in 2023. In the end, as it transpired, no longer having access to the Russian market was not such a critical factor for Ukrainian exporters.

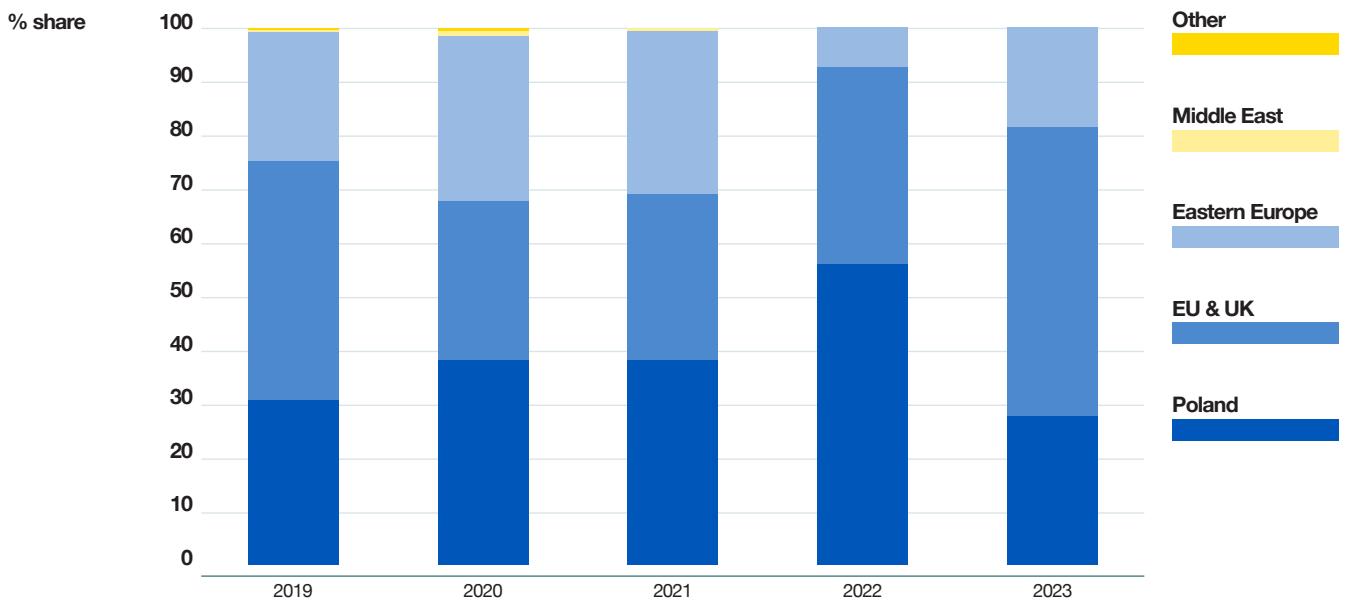
Figure 23 Fresh blueberry exports from Ukraine, volume and value



Source: East Fruit, Global Trade Tracker

Fresh blueberries, meanwhile, brought Ukraine a record export revenue of US\$16.5mn in 2023. This was a landmark result, one that meant blueberries were more profitable for exporters than apples for the first time. Simultaneously, Ukraine set a historical record for its blueberry exports, shipping a record 4,000 tonnes of the fruit to foreign markets. In 2024, these figures are likely to be surpassed once more. Importantly, growth in blueberry exports should be seen in the context of the first decline in global trade volumes for this berry. So Ukraine has grown its market share.

Figure 24 Destination markets for fresh blueberry exports from Ukraine



Source: East Fruit, Global Trade Tracker

Traditionally, Ukraine exported the bulk of its blueberries to Poland, which then re-exported the lion's share to other countries in the EU. This helped Poland to add value and strengthen its market position. However, protests in the country led to an import ban on Ukrainian berries in 2023, so the process of diversification began. Blueberry exports to Poland declined sharply as a result, while shipments to markets such as the Netherlands, UK, Germany, and Spain, increased. This ate into Poland's market share. Elsewhere, after shipments to Belarus stopped in 2022, Ukraine has successfully compensated by increasing sales to Moldova and Georgia. Some believe that blueberries exported to the latter market have ended up on in Russia, since Georgia is itself a large exporter of blueberries and most of its berries are shipped to that market.

Exports of frozen fruits and berries from Ukraine continue to grow too. In 2023, they reached a record 85,600 tonnes, but revenue fell sharply to US\$115.7mn – 40 per cent down on the year. That was mostly because of a decline in global market prices, as well as pressure on Ukrainian producers to sell as fast as possible amid Russian attacks on civil infrastructure. Frozen berries continue to be shipped mostly to countries in the EU, but there is a new trend for exports to North America. Consequently, for the first time, Ukraine was added to the list of biggest suppliers of frozen raspberries to the Canadian and the US markets in 2023.

Can Ukraine improve on, or at least repeat, the success it has seen over the past year? It's a difficult question to answer, as Russia continues its attempts to occupy new territories in the country. Another consequence of the war is that there is already a severe shortage of labour. Furthermore, weather conditions have presented growers with a number of surprises that have negatively affected fruit yields.

On the other hand, Ukraine has accumulated a huge amount of knowledge and experience in recent years, such that it is seen as a technological leader in eastern Europe, and continues to develop its skills despite Russia's aggression. The local market has shrunk, as millions have been forced to take refuge in the EU. But instead they now consume Ukrainian products where they are. Conversely, many have stayed in occupied territories that were the main buyers. And so, more products are becoming available for export, which allows us to hope for future growth. ●

Central role



Andriy Yarmak
International Agribusiness Analyst
Italy

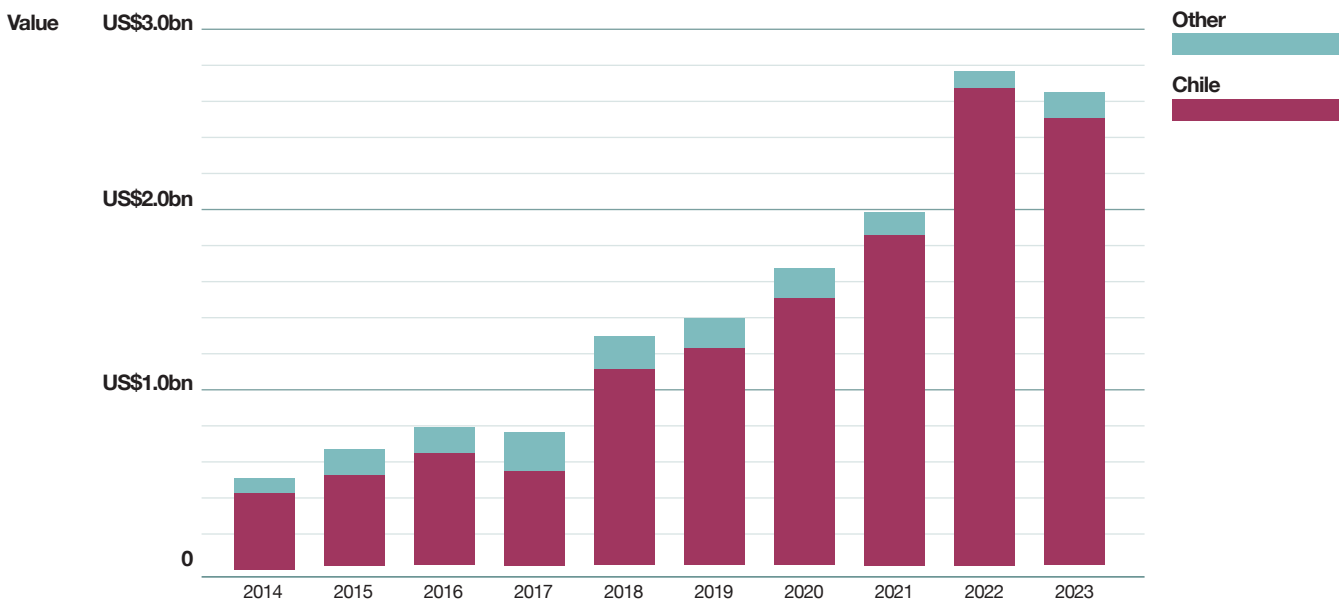
Could China replace Russia as the main buyer of fruits and vegetables out of Central Asia? My contacts in the region tell me that they have seen a marked and sudden increase in China's economic influence there. And they note a significant rise in the number of Chinese businessmen, experts, and officials visiting their countries. It's an intriguing prospect, and one which could have major consequences for the international fresh produce market.

In the past decade, China has certainly shown considerable willingness to facilitate market access for fresh produce out of Central Asian nations. For several years now, Uzbekistan, Tajikistan, and Kyrgyzstan have each been allowed to export a wide variety of fresh fruits and vegetables to China, a privilege that many other countries – India, Australia, and South African among them – have struggled to secure. It makes economic sense for China to favour its neighbours in Central Asia, but more to the point can those countries shift their export focus away from their traditional market Russia? And do they even want to do so?

Let's look at some data. What could Central Asia offer China when it comes to fresh produce? The region is relatively remote, which means long and expensive logistics to reach international markets. So it ends up converting a lot of its fresh produce – such as apricots, plums and grapes – into dried fruit, using the advantage of a sunny and dry climate. Consequently, dried fruit is the main export category, and the only one where Russia is not the main market. That position is occupied by none other than China, although Turkey and Russia do buy similar volumes. Uzbekistan is already China's second-largest dried fruit supplier, and there is significant potential for this trade to grow, assuming wider quality and variety is available.

Fresh produce is much more profitable for growers, but also far more perishable, which makes the situation very different. Although the FAO estimates production of cherries in Uzbekistan to be over 200,000 tonnes a year, exports of this lucrative product to China – the world's largest importer of the fruit – have never exceeded a few hundred tonnes, or 0.1 per cent of Uzbek production. And yet in some seasons Uzbekistan has exported more than 60,000 tonnes of fresh cherries. Nearly all of it went to Russia, Kazakhstan, and other neighbouring countries. But none to China.

Figure 25 China's cherry import value



Source: UN Comtrade

Besides cherries, Uzbekistan can export a lot of fresh grapes, melons and watermelons, onions, tomatoes, plums, peaches, apricots, persimmons, and pomegranates. For most of the stonefruit and table grapes, there are opportunities in China, but taking advantage of them is not so easy. The fact that countries in Central Asia have traditionally supplied Russia means their quality standards, varieties and product taste profiles are very different to those required by buyers in China. As an example, Uzbek exporters cannot source sufficient volume of large, sweet cherries, even though the price they could get is very attractive. On the other hand, sending nearly all of your produce exports to Russia is a risk. After all, the main reason that is possible is that Russia has banned imports from all of the EU and several other countries. The Russian market is very unpredictable, which threatens the sustainability of an industry that is vital for Central Asia.

Switching at least some fresh exports to China would make sense for both sides. But it will take a long time and effort to transfer even 10 per cent of that business. Growers need to adopt new technologies, change the way they pick, handle and package produce, and learn new approaches to client marketing and communication. A lot more effort is required on China's part too. In reality, Uzbekistan is making far more progress diversifying its fresh exports to the EU, where technical advisers offer exporters technical assistance to meet food safety and quality standards. This has resulted in steady growth in exports of melons, grapes and onions, as well as dried fruit. In the longer term, Central Asian suppliers may find they have even more options at their disposal.

Closer trade ties with China may well emerge as more and more young Uzbeks are educated at universities in Asia. South Korea has shown interest and is developing closer economic links with Central Asia. So on balance, I think it is possible that we will see more produce from the region entering markets in China and other Asian countries in the near future. ●

Durian domination



Wayne Prowse
Senior Analyst
Fresh Intelligence

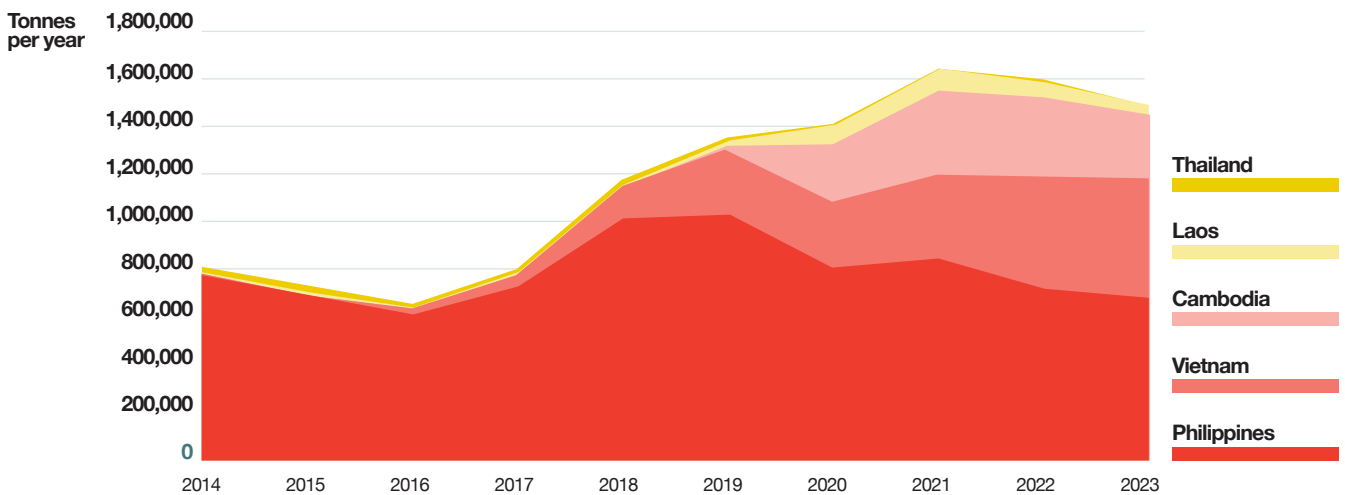
Durians may not be top of mind among European traders, but the fruit is powering growth in Asia's fresh produce trade. In fact, demand from China has lifted imports out of south-east Asia by a whopping 74 per cent, to 1.4mn tonnes in the space of just one year. As mentioned earlier in this report, Thailand is China's main supplier of the fruit. But with market access granted to Vietnam in 2021 and the Philippines in 2023, buyers now have more options and the scale of growth has been astounding at an average of 24 per cent per year since 2018.

Overall, trade between countries in Asia was up 6.2 per cent to 11mn tonnes in 2023, and accounted for 70 per cent of the area's total trade. Imports from outside Asia, which included shipments from the Americas, Africa, Europe and Oceania, were down ever so slightly (0.4 per cent) to 4.6mn tonnes in 2023. But it was movement of tropical fruit – not just durians, but also bananas, longans, dragon fruit and mangosteens – that drove the northbound trade. Thailand sent around 300,000 tonnes of longans and mangosteens, and Vietnam about the same volume of dragon fruit. Meanwhile, exports of apples, pears, grapes and mandarins went in the other direction to south-east Asia's warmer markets, making up the bulk of the intra-Asian trade.

China is the dominant player in the region as a producer, exporter and importer. And its imports of tropical fruit from south-east Asia have increased from 700,000 tonnes to 4.3mn tonnes since it joined the World Trade Organisation in 2002. Meanwhile, China's exports of temperate fruits to south-east Asia have risen from 800,000 tonnes to 2.9mn tonnes over the same period. That increase in particular has had a major impact on trade lanes that were traditionally occupied by products from outside Asia.

Rail freight underpins much of that north-south trade. The China-Laos Railway, which opened in 2021, has certainly improved market access for Laos and Thailand, connecting the Laotian capital Vientiane with the entire Chinese rail network. It has already moved over 4.2mn tonnes of cargo – including 1.04mn tonnes in the first half of 2024 – and takes just three days to bring durians from the Thai border with Laos to Kunming, a major city in Yunnan province, compared with ten days by road. The railway is to be extended into Thailand, and this is expected to open more opportunities for northbound tropical fruit exports north and southbound temperate fruit exports.

Figure 26 Where does China import bananas from?



Source: Fresh Intelligence, ITC TradeMap

There have been other notable changes in Asia's fruit trade. The Philippines was traditionally one of China's major suppliers, but in the past decade its share has fallen from 95 per cent to 47 per cent. That erosion is down to Vietnam and Cambodia: both have grown their market share on the back of improved supply chain management and logistics – including the aforementioned rail connections. China imported 1.7mn tonnes of bananas in 2023, 84 per cent of them supplied from south-east Asia and the balance from Ecuador. In Japan and South Korea, banana imports totalled 1.3mn tonnes that same year, mostly from the Philippines.

China is far and away the lead exporter of temperate fruits to south-east Asia, exporting 97 per cent of the 3mn tonnes sent to the region from north Asia. Its mandarin exports increased by an average of 14 per cent per year to 903,000 tonnes over the five years to 2023. Along with apples (795,000 tonnes), table grapes (483,000 tonnes), and pears (479,000 tonnes), much of those sales were to Vietnam, Indonesia, Thailand, Philippines, and Malaysia.

China's increasing dominance within Asia has implications for the intercontinental trade, especially for suppliers of temperate fruits into the region based in other parts of the world. In practice, the country's increasing production and quality standards in apples, pears, grapes, and citrus may eventually reduce what is already fairly low demand from those other origins during the Northern Hemisphere season. And even countries that offer counter-seasonal supply of those products have started to feel the effects of longer Chinese supply windows and extended coldstorage. ●

Green lime for go

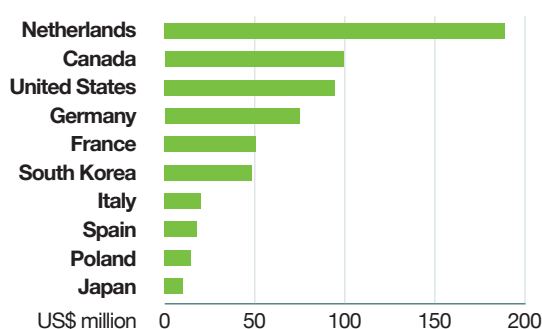


Antonio Lizano
Director of Business Intelligence
AgTools

Global demand for limes has surged significantly in recent years, driven by a mix of culinary trends and health consciousness. Encouraged by greater market demand for this fresh, natural ingredient in the US, growers in Latin America have stepped up their production. But in order to make the most of that opportunity and ensure the fruit is just right for the market, it's crucial to understand something known as tree phenology.

The US has seen a steady increase in the consumption of green limes, especially among health-conscious individuals who incorporate them into beverages, recipes, and wellness routines. Limes are now essential in various foods and drinks, from dishes such as ceviche, guacamole, and tacos, to cocktails like margaritas and mojitos. It's a trend driven by the fruit's versatility, high vitamin C content, and refreshing flavour. But rising demand poses unique challenges and opportunities for importers and suppliers alike. The foodservice and bar industries have embraced the lime, and feature it prominently on their menus. The need for high-quality fruit is now a priority.

Figure 27 Top ten lime importers in 2023



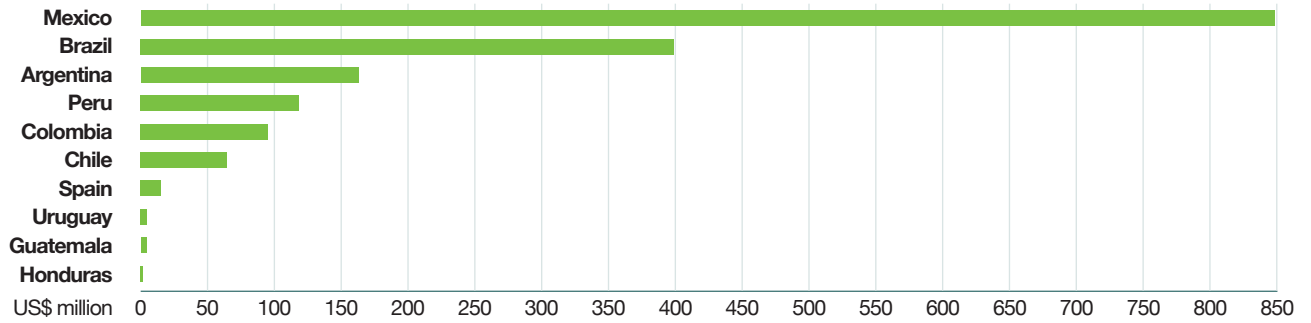
Source: AgTools

Latin America, and Mexico in particular, has met that rising demand. The climate in Mexican states Veracruz, Michoacán, and Colima favours year-round cultivation. Other countries such as Brazil, Colombia, and Peru also ship limes to the US, but Mexico stands out as the largest supplier. Several factors are driving its growth. Land and labour are generally cheaper, and these lower costs allow it to compete on price. Plus, improved irrigation and modern pest management have enhanced yields and quality, enabling producers to meet the international market's high standards.

Successful cultivation hinges on a thorough understanding of phenology, the study of periodic biological phenomena. In lime and indeed lemon trees, vegetative and reproductive processes are closely linked to temperature and other conditions, which makes this knowledge crucial for orchard management. There are three periods of shoot growth: spring (September-November), summer (January-February), and autumn (April-June). Spring and autumn are the most intense, driven by moderate temperatures; summer growth is weaker, likely due to excessive heat. These cycles are crucial for growers who want consistent production to meet market demand throughout the year.

Flowering is key. In Chile, lemon trees bloom throughout the year, unlike orange and mandarin trees that only do so in spring. For lemons and limes, continuous flowering across spring, summer, and autumn allows for multiple harvests and more consistent supply. Understanding each stage means limes can be harvested at precisely the right time, so they reach the market in top condition.

Figure 28 Top ten lime exporters to the US in 2023



Source: AgTools

Meeting market requirements

US consumers want consistent quality and availability, which poses logistical and agricultural challenges for Latin American lime producers. The fruit's seasonality means they must plan carefully to have constant supply, and ensure growth and harvest periods align with peak market demand. What's more, strict import regulations on pesticide use require advanced, tech-enhanced methods on the farm and beyond. In Latin America, producers have invested in cold chain logistics that allow them to ship large quantities of fresh limes and maintain their quality. Post-harvest handling processes – grading, sorting, packaging – further contribute to their success.

There are also sustainability challenges. Water scarcity and other environmental concerns are a factor in some regions where limes are grown. And as global awareness of those issues increases, producers are under pressure to adopt sustainable practices, for example by reducing water consumption and acting to prevent deforestation. This also requires a deep understanding of the plants' phenology, so water-efficient irrigation and optimised growth cycles can be implemented. Climate change poses an additional threat, with erratic weather patterns that disrupt the delicate balance required for optimal production. Diseases like Huanglongbing or greening pose a significant problem for lime growers across Latin America, and will require innovative solutions.

Growth in US demand for green limes looks set to continue. But for Latin America to meet that demand, it must maintain consistent supply, meet quality standards, and address environmental challenges. Understanding the trees' phenology and using that knowledge to manage growth cycles, optimise harvests, and ensure that long-term sustainability are essential. It's a dynamic relationship between market and production that requires both commercial awareness and agricultural knowledge, and one that will shape the future of the lime trade. ●

What if...?



Adam Formica
Chief Science Officer
Sensonomic

What if grapes were cultivated in Florida? Yes, vineyards producing wine grapes on the US East Coast, but I'm talking about table grapes for eating. The region already has a native grape developed for a limited fresh market. It's called muscadine and its range extends from New Jersey to Florida. Its tolerance to a warm and humid climate and low chill hour requirements are properties selected for in newer varieties, which could be grown alongside it.

Florida's climate may not be so unlike that of northern Peru, where table grapes are extensively grown, or increasingly southern Mexico, not to mention western India. Recent advances in plant breeding and management allow new varieties such as Timpson to be produced in these regions. Growing companies in Peru have moved north – and in Mexico south – to extend their market window and take advantage of periods of lower supply when prices are higher.

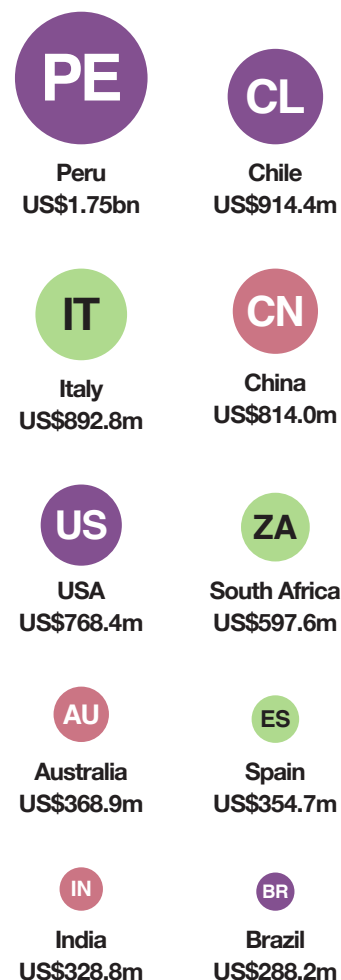
How would table grapes from Florida affect the market? In Peru and Mexico, grapes grown closer to the equator come on the market first. In the US, the effect may be similar, as Miami is about 650 miles south of Bakersfield. In Piura, Peru, which is about 800 miles north of Ica, grapes are ready about a month earlier. If the same were true of Florida grapes, they could fill the gap in supply from Mexico and California in late July and early August. Growers would be closer to New York, Washington DC, and Atlanta. The grapes could avoid a week-long journey in a reefer truck.

What about sweetness? Would cultivars bred for the Floridian climate make for a pleasant eating experience? Today, breeders focus on brix levels, but if they cannot achieve the same sweetness or texture, new ways of marketing could make up for it. More nutritionally balanced grapes with higher levels of antioxidants and polyphenols, like blueberries, could appeal. Emphasising local provenance or regenerative agricultural practices could also help.

To my knowledge there are no large-scale table grape producers in Florida, but look north and you can find one – Union Grove Farm and Vineyard in Chapel Hill, North Carolina. It has put the idea of thin-skinned, seedless muscadine grapes into practice, over 70 acres on the first certified regenerative vineyard in the US. It will be interesting to see if they set a trend for East Coast grapes. ●

Figure 29

Top ten table grape exporters in 2023



Source: UN Comtrade

The logo for FRUIT LOGISTICA features the word "FRUIT" in a bold, blue, sans-serif font above the word "LOGISTICA" in a similar font. The letter "O" in "LOGISTICA" is replaced by a red circle with a white outline, resembling a fruit or a stylized eye.

FRUIT LOGISTICA is the world's leading trade show for the fresh fruit and vegetable business. The event covers every single sector of that business and provides a complete picture of the latest innovations, products and services at every link in the international supply chain. It also offers superb networking and contact opportunities to key decision-makers in every area of the industry.

www.fruitlogistica.com

The logo for FRUITNET consists of the word "FRUITNET" in a bold, white, sans-serif font, centered within a teal-colored rectangular background.

FRUITNET is the world's leading publisher and congress organiser for the global fresh fruit and vegetable business. As the only media provider that can deliver informed coverage of the entire industry, its aim is to help the fresh produce business to grow worldwide by providing useful information and insight via a range of media channels. It is the official cooperation partner of FRUIT LOGISTICA and ASIA FRUIT LOGISTICA.

www.fruitnet.com

FUTURE TRENDS IN FRESH PRODUCE SUPPLY · FRUIT LOGISTICA TREND REPORT 2025

PRODUCED BY Fruitnet Media International, The Food Exchange, New Covent Garden Market, London SW8 5EL, UK

PUBLISHED BY Fruit Logistica, Messe Berlin GmbH, Messedamm 22, 14055 Berlin, Germany