FRUIT LOGISTICA

FRUIT LOGISTICA 2023

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EUROPEAN STATISTICS HANDBOOK

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

In cooperation with:

FRUITNET

EUROPEAN STATISTICS HANDBOOK

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A year with many challenges

For the European fruit and vegetable industry, 2021 was a challenging year. But with the pandemic subsiding, hopes were high that things would be calmer in 2022. If anything, the challenges became even greater. In Europe, the situation changed abruptly with Russia's invasion of Ukraine in February. Initially, it was unclear whether the war would spread further, something which unsettled consumers. As at the beginning of the coronavirus outbreak, consumers hoarded food. Then, there was the question of whether and how much seasonal labour would be available from countries to the east.

After that initial uncertainty, what followed was economic shock. Prices for energy and fertilizers rose sharply, and as a result other raw materials that require a lot of energy to produce also became more expensive. The cost-of-living price index was already higher as a result of the pandemic. In March 2022, inflation was on the up again; in European countries it reached levels that consumers had not seen for decades. Energy accounted for the largest share of that cost-of-living increase. Fruits and vegetables, on the other hand, were hardly price drivers at first, although they were often used as an accompanying image motif when reporting on inflation. Consumers reacted by exercising restraint, and this dampening of demand did affect certain fruit and vegetable categories.

The industry will continue to face these challenges in 2023. It is important that prices not only rise at consumer level, but that prices are achieved along the entire value chain, right through to the grower.

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In cooperation with:
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Population 447.0 m

Area 4,381,300 km²

GDP per Inhabitant 32,430 EUR

GDP Growth 5.4 per cent

Unemployment 4.5 per cent

CPI for Food (2015=100) 108.8

EUROPEAN UNION

For consumers in the EU, 2022 was characterized by a sharp rise in the cost of living. Energy sources in particular became significantly more expensive with the start of the war in Ukraine. This was felt both by private consumers and by producers and traders of fruit and vegetables. At the beginning of the year, the rates of change in the consumer price index compared with the previous year were still comparatively moderate. In January, food and non-alcoholic beverages were 4.8 per cent more expensive for consumers in the EU than a year earlier. The rate of change was thus still below that of the overall cost of living index. This was increasingly influenced by high energy costs. With a year-on-year increase of 11.5%, the cost of living index in the EU reached its peak for the time being in October 2022. From April, the price index for food and non-alcoholic beverages had also jumped. Here, there was still no end in sight in November, and consumers had to spend around 17.9 per cent more on food in November 2022 than a year earlier. Price increases were above average in the Baltic states in particular, but also in the Czech Republic, Poland and Portugal. Fresh fruit and vegetables had made only a minor contribution to the cost-of-living increase in large parts of the year. The rate of inflation for fresh fruit was highest in October at 9.4 per cent, while consumer prices for vegetables were up 24 per cent year-on-year in October. However, this was also due to the fact that prices were rather low in October 2021. In addition, the limited supply came into full effect in October 2022. Nevertheless, it was mainly gas, electricity and other fuels that were more expensive for consumers. In October, the year-on-year increase was 53.9 per cent across Europe. Consumer uncertainty, in view of the high cost of energy, led to reluctance to buy everyday consumer goods, which was also felt by fruit and vegetables.

The sharp rise in energy costs hit the cultivation of fruit and vegetables in greenhouses particularly hard. Cultivation during the winter months in particular was curtailed for cost reasons. However, fuel for tractors and fertilizers and crop protection products also became significantly more expensive over the course of 2022. The price index of agricultural inputs with the base year 2015 was close to the 100 per cent mark until the third quarter of 2020. From 2021 onward, the index rose noticeably from quarter to quarter, averaging 154 per cent for the EU-27 in the third quarter of 2022. While seed and crop protection products have so far only increased moderately in price, the cost increase is largely attributable to fuels and fertilizers. The price index for fertilizers was 229 per cent in the third quarter of 2022. For fruit and vegetable producers, the high purchase prices for inputs and the associated high production costs were a challenge. This was because goods sometimes flowed slowly off the market due to subdued consumer demand in some cases, with the result that the market situation prevented producers from raising selling prices to the extent that would actually have been necessary given the cost structure. For example, the price index for agricultural products for vegetables was only 143 per cent in the third quarter

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PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	10,654	10,573	11,906	12,000
Oranges	6,218	6,538	6,511	6,290
Easy peelers	2,917	3,300	3,253	3,085
Watermelons	3,021	2,922	3,100	2,742
Pears	1,980	2,297	1,769	2,109
Peaches	2,518	2,036	1,808	1,885
Melons	1,728	1,768	1,814	1,662
Table grapes	1,833	1,779	1,745	1,655
Nectarines	1,473	1,038	939	1,104
Other	9,693	10,209	9,965	10,131
TOTAL	42,035	42,461	42,810	42,664

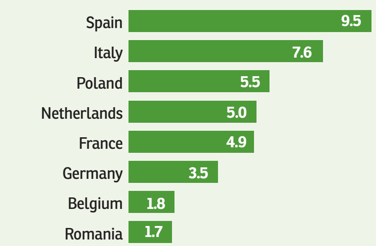
FRESH VEGETABLES [1]	2019	2020	2021	2022p
Onions, dry	6,837	6,621	7,293	6,314
Tomatoes [2]	6,263	6,330	6,855	6,169
Carrots	5,495	4,696	5,274	4,957
Cabbage	3,283	3,062	3,043	2,951
Peppers	2,864	2,933	3,200	2,880
Lettuce	2,513	2,347	2,452	2,525
Cucumbers	2,439	2,529	2,541	2,287
Cauliflower	2,157	2,194	2,129	2,001
Courgettes	1,574	1,633	1,697	1,731
Other	14,311	15,186	15,207	14,848
TOTAL	47,737	47,531	49,689	46,664

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

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

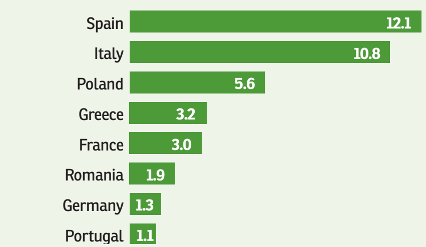
TOP 8 VEGETABLE PRODUCERS 2021 [3]

(million tonnes)



TOP 8 FRUIT PRODUCERS 2021

(million tonnes)



PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Spain	13,684	14,179	14,007	12,099
Italy	10,421	10,325	9,817	10,785
Poland	3,793	4,422	5,321	5,639
Greece	2,940	3,120	2,874	3,221
France	3,108	2,737	2,603	3,032
Romania	1,834	1,776	1,923	1,887
Germany	1,330	1,352	1,301	1,338
Portugal	1,259	1,141	1,369	1,134
Netherlands	767	749	718	749
Hungary	930	725	888	727
Belgium	649	625	674	653
Bulgaria	373	334	380	386
Austria	225	193	188	237
Czechia	130	143	138	161
Croatia	171	152	159	151
Cyprus	122	119	128	129
Slovenia	49	59	52	56
Denmark	43	58	48	56
Sweden	39	52	46	49
Slovakia	47	41	45	49
Lithuania	36	76	46	39
Ireland	26	26	28	28
Other EU	60	57	57	59
TOTAL	42,035	42,461	42,810	42,664

FRESH VEGETABLES [3]	2019	2020	2021	2022p
Spain	10,391	9,971	10,430	9,497
Italy	7,211	7,212	7,862	7,600
Poland	5,354	5,240	5,369	5,549
Netherlands	5,484	5,383	5,695	5,017
France	5,263	5,160	4,981	4,935
Germany	3,707	3,693	4,057	3,499
Belgium	1,777	1,726	2,007	1,836
Romania	1,865	1,957	1,941	1,748
Greece	1,445	1,583	1,601	1,563
Hungary	1,303	1,264	1,260	1,190
Portugal	794	1,101	1,201	1,010
Austria	611	644	675	674
Sweden	346	395	409	413
Denmark	300	303	287	292
Finland	294	297	284	290
Czechia	226	252	275	261
Bulgaria	313	256	262	249
Lithuania	230	220	238	226
Ireland	219	222	231	219
Croatia	141	182	145	140
Slovakia	122	119	142	135
Slovenia	119	134	114	109
Other EU	222	217	223	212
TOTAL	47,737	47,531	49,689	46,664

Continued from page 3

EUROPEAN UNION

of 2022. For fruit, it reached 165 per cent, although the increase was significantly weaker in quarters one and two.

The impact of high transport costs and limited transport capacities on the EU-27's foreign trade in fresh fruit and vegetables was not as pronounced as initially expected. In intra-EU trade, imports of fresh fruit and vegetables were 3 per cent down on the previous year. More pronounced declines were recorded for watermelons and carrots. However, these can be explained by the smaller supply of both species. Salads and mushrooms were also imported in significantly smaller quantities than in the previous year. High production costs led to restrictions on the production of mushrooms, so there was also less product available for international trade. Intra-trade exports also fell only slightly, with fewer fruits exported in particular. In extra trade, the changes were somewhat more pronounced. A good 3 per cent less fruit and vegetables were imported from countries outside the EU. Imports of oranges and apples in particular fell. The European market has become less attractive to suppliers from outside the EU due to the comparatively weak euro. As a result, bananas and other tropical fruits are also taking different routes in some cases. Watermelons, on the other hand, were increasingly imported from countries outside the EU due to the restrictions on cultivation in the EU. In vegetables, imports of onions, carrots and cucumbers from extra countries in particular were down on the previous year. The main reason for this was the higher level of self-sufficiency among EU countries.

Overall, the fruit and vegetable harvest in the EU-27 countries was around 3 per cent lower in 2022 than in the previous year, according to preliminary data. However, the decline is almost exclusively attributable to vegetables, and the results differ in some cases significantly between the individual fruit and vegetable types. For example, the fruit harvest as a whole was only 0.3 per cent smaller than in the previous year. There were cuts due to extreme weather conditions, particularly for citrus fruits in Spain. Excessive rainfall was initially recorded during flowering and fruit set, before heat, drought and limited irrigation options affected the crops in the following months. As a result, Spain expected the smallest citrus crop in the past decade at the start of the season. Across Europe, a total of 3 per cent fewer oranges and 5 per cent fewer Easy Peelers are estimated to have been harvested. The cuts in watermelons and sugar melons were even more significant. After weak economic

Continued on page 6

IMPORTS – INTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	3,074	3,135	3,334	3,226
Apples	1,891	1,925	1,910	1,765
Oranges	1,737	1,814	1,713	1,756
Easy peelers	1,398	1,439	1,460	1,478
Watermelons	1,353	1,395	1,377	1,198
Table grapes	857	915	942	949
Lemons	828	887	856	812
Pears	731	692	739	731
Avocados	414	503	542	562
Other	5,236	4,921	4,991	4,873
TOTAL	17,518	17,625	17,863	17,351

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes	2,148	2,069	2,047	1,954
Onions	1,192	1,183	1,232	1,217
Lettuce	1,105	1,055	1,117	1,117
Cucumbers	1,124	1,159	1,140	1,104
Peppers	1,061	1,106	1,113	1,073
Carrots	1,044	1,001	989	834
Cauliflower	415	432	440	474
Courgettes	399	420	429	398
Mushrooms	299	308	322	297
Other	2,753	2,809	2,971	2,903
TOTAL	11,540	11,542	11,801	11,371

EXPORTS – INTRA EU

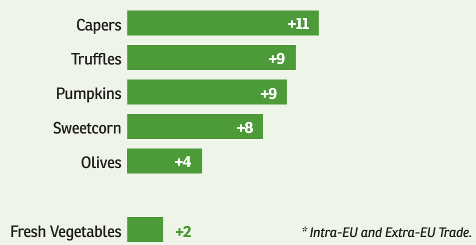
VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	3,065	3,041	3,119	3,032
Oranges	2,066	2,146	1,999	2,020
Apples	1,878	1,890	1,847	1,735
Easy peelers	1,539	1,528	1,523	1,565
Other	9,566	9,474	9,782	9,261
TOTAL	18,114	18,079	18,269	17,614

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes	2,240	2,154	2,141	2,384
Lettuce	1,229	1,188	1,256	1,220
Onions	1,312	1,170	1,146	1,169
Peppers	1,167	1,188	1,170	1,139
Other	6,186	6,204	6,459	6,182
TOTAL	12,133	11,903	12,172	12,094

TOP 5 FRESH VEGETABLE IMPORTS*

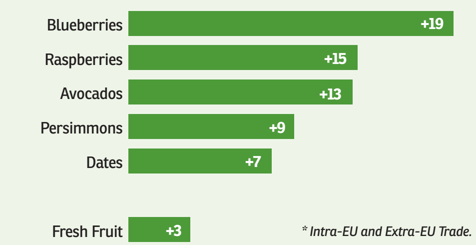
VOLUME GROWTH (% p.a. 2012-2021)



* Intra-EU and Extra-EU Trade.

TOP 5 FRESH FRUIT IMPORTS*

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



* Intra-EU and Extra-EU Trade.

IMPORTS – EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	5,039	5,287	5,265	5,120
Pineapples	881	776	827	782
Oranges	822	930	899	698
Avocados	532	604	678	671
Table grapes	520	498	576	601
Watermelons	373	421	424	512
Lemons	332	391	407	474
Easy peelers	341	411	456	418
Apples	366	360	344	305
Other	2,070	2,206	2,174	2,123
TOTAL	11,275	11,885	12,049	11,704

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes	583	621	705	741
Peppers	201	220	242	232
Onions	536	275	292	215
Cucumbers	72	100	126	101
Courgettes	64	59	63	66
Carrots	112	79	69	60
Mushrooms	30	30	29	30
Lettuce	21	16	14	15
Cauliflower	12	11	9	8
Other	555	561	589	550
TOTAL	2,187	1,972	2,138	2,017

EXPORTS – EXTRA EU

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	1,462	1,071	1,141	1,129
Oranges	460	396	376	389
Easy peelers	372	355	313	341
Avocados	94	103	94	97
Other	2,209	2,034	1,861	1,827
TOTAL	4,597	3,959	3,785	3,783

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Onions	1,062	1,333	1,238	1,402
Tomatoes	461	442	377	377
Peppers	321	318	288	302
Lettuce	253	246	245	240
Other	1,277	1,262	1,306	1,303
TOTAL	3,374	3,601	3,455	3,624

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

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EUROPEAN UNION

results in the previous two years, acreage for the 2022 season had been restricted in key producing countries. Late frosts in the spring then caused additional losses and delays. According to initial estimates, around 11% fewer watermelons and 8 per cent fewer sugar melons were harvested across Europe. The fact that the overall fruit harvest nevertheless fell only slightly is due to higher harvest volumes of stone fruit as well as pears. After frosts had led to losses in 2020 and 2021, frost damage in 2022 remained significantly smaller than in the two previous years. Peaches, nectarines and apricots were harvested in larger quantities than in 2021. In a long-term comparison, however, the harvest was slightly below average. In pome fruit, there were failures on the Iberian Peninsula and in southeastern Europe. Overall, however, the 2022 apple crop did not deviate significantly from the previous year's volume. However, the general marketing conditions posed a major challenge for the industry. The real challenge, however, was the weak demand from private consumers for months.

The vegetable harvest in 2022 was a good 6 per cent lower than in the previous year. However, a very large quantity of vegetables was also harvested in 2021. The small onion harvest was particularly significant. The very large onion crop in 2021 had put pressure on prices throughout Europe. As a result, the area under cultivation was significantly reduced for the 2022 season. The effect of the smaller acreage was then exacerbated by the Europe-wide summer drought. The sharp rise in energy costs was also reflected in crop volumes. For the fruit vegetables tomatoes, peppers and cucumbers, the crop volume across Europe is estimated to be around 10 per cent smaller than in the previous year. In heated and lit greenhouse cultivation in the Benelux region, production periods were shortened to keep costs in check. However, conditions in the Spanish growing regions were also not ideal, particularly in the spring of 2022, with the result that slightly below-average yields were also achieved here. The record harvest of carrots from 2021 was not matched. The yield losses due to the dry and hot summer could not be fully compensated for even by late rainfall. This also applies to other stored vegetables such as head cabbage or celeriac. For many outdoor vegetables, conditions in the summer of 2022 were not optimal. Thus, fine cabbage vegetables such as cauliflower and broccoli were harvested in smaller quantities. In contrast, lettuces and zucchini achieved a slight increase in harvest volume.

IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Netherlands	5,143	5,374	5,655	5,531
Germany	5,431	5,632	5,495	5,212
France	3,402	3,394	3,596	3,542
Belgium	2,162	2,242	2,203	2,071
Italy	2,048	2,050	1,987	1,988
Spain	1,746	1,831	1,998	1,978
Poland	1,622	1,715	1,716	1,614
Romania	808	819	830	852
Portugal	841	903	893	846
Austria	705	718	655	678
Sweden	668	679	670	647
Other	4,216	4,152	4,214	4,098
TOTAL	28,794	29,509	29,912	29,055

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Spain	7,931	7,489	7,340	7,009
Netherlands	4,216	4,328	4,445	4,342
Italy	2,673	2,620	2,620	2,603
Belgium	2,013	1,968	1,916	1,775
Greece	1,268	1,364	1,258	1,264
Poland	1,283	995	1,293	1,043
France	943	953	906	1,018
Germany	598	610	640	603
Portugal	509	536	500	588
Slovenia	181	197	199	193
Austria	216	206	178	164
Other	878	773	758	797
TOTAL	22,711	22,038	22,054	21,397

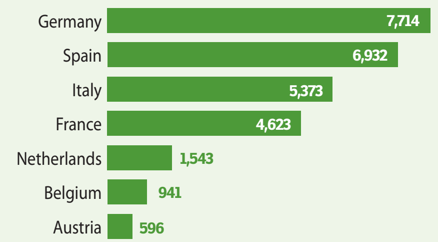
TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	30,057	33,166	33,526	34,234
Export	23,652	25,815	26,323	26,413
TRADE BALANCE	-6,404	-7,351	-7,204	-7,821

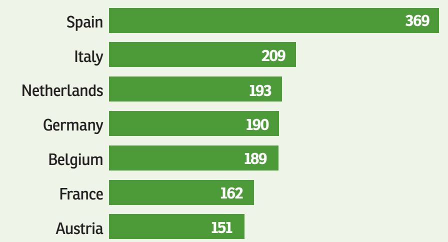
HOUSEHOLD DEMAND 2021 [1]

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



HOUSEHOLD DEMAND 2021 [1]

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



IMPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Germany	3,366	3,503	3,564	3,106
France	1,907	1,886	1,954	1,917
Netherlands	1,496	1,407	1,584	1,460
Belgium	1,099	1,145	1,151	1,066
Poland	827	779	784	890
Italy	733	651	638	735
Spain	663	642	697	719
Czechia	480	471	457	455
Romania	363	356	389	379
Sweden	357	348	348	344
Austria	338	314	332	320
Other	2,098	2,012	2,043	1,999
TOTAL	13,726	13,514	13,939	13,388

EXPORTS – INTRA + EXTRA-EU

VOLUME ('000 tonnes)

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Spain	5,388	5,415	5,360	5,128
Netherlands	5,027	5,043	5,013	5,033
France	1,023	1,002	1,027	1,103
Belgium	950	970	891	1,062
Poland	699	689	734	845
Italy	844	862	911	843
Germany	458	417	442	404
Portugal	262	231	279	334
Austria	148	168	192	195
Greece	135	133	158	147
Hungary	77	84	94	90
Other	497	489	527	537
TOTAL	15,507	15,505	15,627	15,719

TRADE BALANCE

VALUE (million euros)

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Import	15,654	15,986	17,099	17,577
Export	17,011	17,254	18,513	19,102
TRADE BALANCE	+1,357	+1,268	+1,414	+1,525

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

Population
8.9 m

Area
83,900 km²

GDP per Inhabitant
45,370 EUR

GDP Growth
4.6 per cent

Unemployment
4.2 per cent

CPI for Food
(2015=100)
111.5

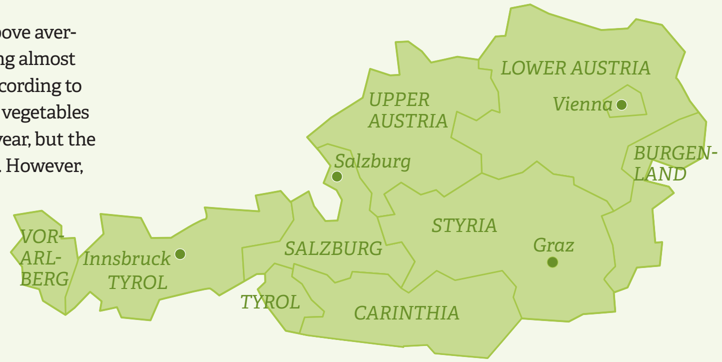
AUSTRIA

After two years with small harvests due to the weather, Austria's commercial fruit harvest was bigger than average in 2022. According to Statistics Austria, just over 237,200 tonnes of fruit were harvested, excluding chokeberry and elderberry. This was 26 per cent more than in the previous year, and 12 per cent up on the ten-year average. This means that the harvest result was above average despite intermittent drought, local hail damage and late frosts in Lower Austria and Burgenland. The focus in Austrian fruit growing is on topfruit, so apples and pears. Not only were 202,500 tonnes of topfruit harvested. Topfruit thus accounted for 85 per cent of the total fruit harvest. In contrast, a stonefruit harvest of just under 11,100 tonnes was again significantly larger than in the previous year, but 3 per cent down on the ten-year average. Berry production remains in the ascendancy. Record harvests of strawberries and blueberries were largely responsible for this.

The vegetable harvest in 2022 was also above average, with the area under cultivation remaining almost unchanged from 2021 at around 18,500 ha. According to Statistics Austria, a total of 674,300 tonnes of vegetables were also harvested, similar to the previous year, but the five-year average was exceeded by 9 per cent. However, heat and drought in the summer posed a challenge for vegetable producers, as the amount of irrigation required was correspondingly high. Optimal growing conditions in early summer and good climatic conditions in late autumn, however, largely compensated for the losses due to the late start of vegetation and the hot and dry summer. The group of legumes, root, and bulb vegetables, with the leading crops onions and carrots, most recently accounted for a share of 54 per cent of the vegetable harvest in Austria, with a good 365,200 tonnes. The share of the open field vegetable harvest in Austria was also higher than in the previous year. The cultivation area of energy-intensive greenhouse crops was limited by a shortened season, a reduction in cultivation rates and farm closures.

Press reports suggest that producers of fruit vegetables have stopped energy-intensive winter production in many places, due to the sharp rise in energy prices following Russia's invasion of Ukraine. In spring 2023, planting and production could start later. In the short term, there will be a shortage of around 10,000 tonnes of locally grown tomatoes, cucumbers, peppers and other fruit vegetables in the supermarkets. Therefore, there will probably be a greater reliance on imported goods from southern Europe.

In November 2022, inflation in Austria reached 10.6 per cent, according to Statistics Austria, up from 11.0 per cent in October – its highest level in 70 years. Upward pressure on prices for household energy and fuels, the most important inflation drivers, also weakened slightly. According to the Oesterreichische Nationalbank, Austria's inflation rate could reach 8.6 per cent in 2022, and remain at 6.5 per cent in 2023. To support households financially, an electricity cost brake took effect from 1 December 2022 and will remain in force until 30 June 2023.



PRODUCTION

VOLUME ('000 tonnes)

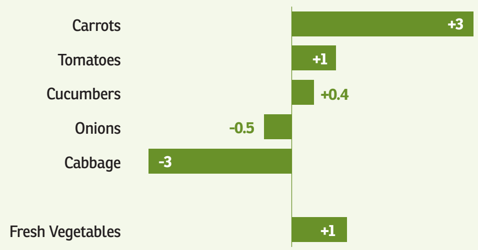
FRESH FRUIT [1]	2019	2020	2021	2022p
Apples	184	160	152	191
Strawberries	14	13	14	17
Pears	6	8	8	12
Apricots	10	1	4	5
Currants	3	3	3	3
Blueberries	1	2	2	2
Plums	2	2	2	2
Sweet cherries	2	1	1	2
Peaches	2	1	1	2
Other	1	1	1	1
TOTAL	225	193	188	237

FRESH VEGETABLES [1,2]	2019	2020	2021	2022p
Onions	142	154	169	175
Carrots	108	116	118	118
Tomatoes	58	59	60	57
Red/white cabbage	36	40	41	46
Cucumbers	45	46	48	44
Iceberg lettuce	20	22	23	22
Sweetcorn	13	13	15	19
Celeriac	12	14	14	15
Peppers	15	15	15	13
Other	162	166	172	165
TOTAL	611	644	675	674

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

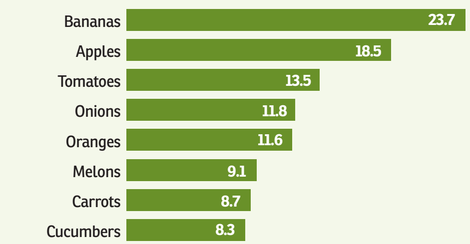
TOP 5 PRODUCTION OF FRESH VEGETABLES

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



TOP 8 FRUIT AND VEGETABLES 2021

HOUSEHOLD PURCHASES (kg)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	140	147	141	142
Apples incl. cider	97	96	67	76
Watermelons	35	43	38	42
Table grapes	36	40	42	41
Easy peelers	38	41	37	36
Lemons	42	40	34	35
Pears incl. cider	28	22	16	20
Sweet cherries	20	26	27	16
Other	272	265	255	256
TOTAL	708	719	657	664

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	52	47	51	58
Peppers	52	55	59	57
Cucumbers/Gherkins	28	30	33	32
Lettuce	43	36	35	20
Courgettes	18	19	20	18
Mushrooms	15	14	10	11
Kohlrabi, Savoy	14	14	15	10
Onions	15	10	12	8
Other	101	90	97	99
TOTAL	338	314	332	313

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples incl. cider	100	64	52	48
Sweet cherries	15	19	21	13
Table grapes	9	10	12	10
Bananas	13	11	8	8
Other	79	103	85	86
TOTAL	217	207	178	165

FRESH VEGETABLES	2019	2020	2021	2022p
Onions	47	57	66	70
Pepppers	24	28	31	30
Tomatoes	14	12	19	25
Cucumbers/Gherkins	10	14	15	18
Carrots	17	16	15	14
Other	36	40	46	33
TOTAL	148	168	192	190

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	846	946	923	951
Export	238	292	283	244
TRADE BALANCE	-608	-655	-640	-707

FRESH VEGETABLES	2019	2020	2021	2022p
Import	549	508	538	556
Export	152	143	158	181
TRADE BALANCE	-397	-365	-380	-375

Population
11.6 m

Area
30,500 km²

GDP per Inhabitant
43,340 EUR

GDP Growth
6.1 per cent

Unemployment
3.8 per cent

CPI for Food
(2015=100)
111.7

BELGIUM

At the beginning of 2022, Belgium made an important decision to allow for the ports of Antwerp and Zeebrugge to merge. Now known as Port of Antwerp-Bruges, the move catapulted Belgium into first place among the largest export hubs in Europe. Total throughput is estimated around 278m tonnes per year. Although Belgium is one of the smaller countries in Europe, its ports make it one of the most important centres for overseas cargo distribution. Fruit such as kiwifruit from New Zealand, for example, which comes by ship from overseas, is distributed further into Europe from Belgium. The logical conclusion would be that the ports' merger will also have an impact on the fresh fruit and vegetable trade. The focus is primarily on imports and especially on fruit, which accounted for a volume share of 65 per cent in 2021. However, pear exports towards the east will fall away in 2022/23 as re-exports to Russia via Belarus dry up.

In terms of domestic production, 2022 was far from ideal. The heatwave that gripped almost all of Europe did not spare Belgium, and prolonged high temperatures and lack of rainfall resulted in severe crop losses. The drought continued into October, so by the beginning of August even strict water saving measures were discussed. Those producers who were able to irrigate sufficiently still faced rising costs for that water. Autumn crops, on which the processing industry depends, were particularly affected. When the raw materials needed are only available in limited and irregular quantities, factories cannot work at full capacity. This in turn causes costs to soar.

In addition to the more difficult weather conditions, energy prices also soared in 2022 as a result of the war in Ukraine. In particular, costs for fertiliser, packaging and labour have increased. Talks are also underway in Belgium about a ban on most plastic packaging for fruit and vegetables. The only exception would be for perishable items such as soft fruit. The law, which is due to be passed by the beginning of 2024, poses an additional challenge for producers.

The energy crisis has also affected greenhouse production, especially for tomatoes and strawberries. And as costs rise, the number of greenhouse growers is likely to decline further. Domestic tomato supply in 2022 was below the previous year's level, which means imports from Spain and Morocco will gain in importance. During the current 2022/23 winter strawberry season, meanwhile, the high cost of greenhouse production means only 10-20 per cent of regular volumes will be available. The Belgian Veiling Hoogstraten, which markets most of the country's strawberries, expects very weak supply until the beginning of March. A similar lag in supply could be repeated in spring 2023.

The rate of inflation has more than doubled since the start of 2022. In October, it peaked at 12.27 per cent. As a result, food inflation was as high as 14.48 per cent in November. The abolition of 6 per cent VAT on fresh fruit and vegetables, as discussed by Flemish Green Party MPs, would bring little relief in this context. After all, fresh fruit and vegetables have become 5.8 per cent more expensive in the past year.

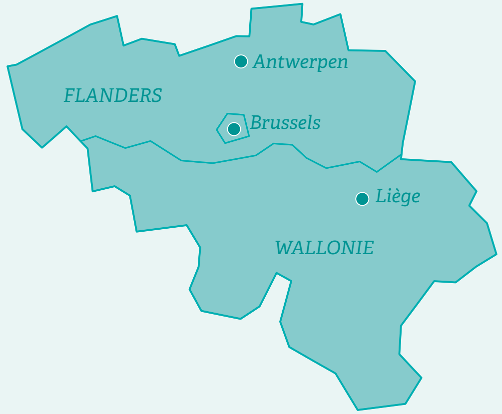
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Pears	332	393	354	366
Apples	242	168	240	219
Strawberries	53	43	51	51
Other	22	21	29	17
TOTAL	649	625	674	653

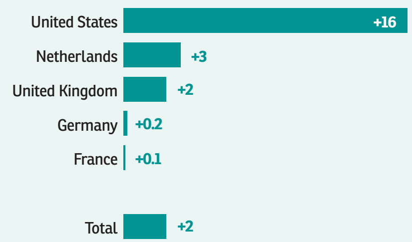
FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes	270	312	283	288
Leeks	109	109	127	135
Carrots	78	67	100	82
Witloof chicory	35	32	33	33
Lettuce	34	33	32	30
Cucumbers	27	28	32	29
Peppers	27	25	27	26
Celeriac	17	14	16	18
Courgettes	14	12	11	13
Other [2]	1,166	1,094	1,346	1,182
TOTAL	1,777	1,726	2,007	1,836

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



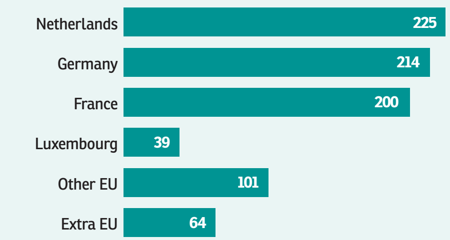
TOP 5 FROZEN VEGETABLE EXPORTS

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



FRESH VEGETABLE EXPORTS 2021

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VBT

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Exotics	1,578	1,626	1,612	1,526
Citrus	205	234	231	213
Apples	113	119	107	84
Pears	49	44	37	39
Other	226	228	220	160
TOTAL	2,171	2,251	2,207	2,022

FRESH VEGETABLES	2019	2020	2021	2022p
Carrots/Turnips	264	271	261	217
Peas	111	116	149	115
Onions/Shallots	124	131	117	103
Green beans	88	103	114	103
Tomatoes	68	59	72	70
Cucumbers	69	67	68	60
Peppers	49	51	53	55
Other	322	341	346	313
TOTAL	1,096	1,139	1,180	1,036

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Exotics	1,380	1,296	1,113	1,127
Pears	313	311	353	327
Apples	194	154	126	150
Strawberries	45	43	38	39
Other	84	75	90	97
TOTAL	2,016	1,879	1,720	1,740

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	248	261	228	429
Carrots/Turnips	212	232	201	177
Leeks	70	70	64	67
Onions/Shallots	43	52	37	45
Cucumbers	50	46	49	43
Peppers	32	33	37	38
Celeriac	25	22	22	22
Witloof chicory	21	17	20	22
Other	246	238	232	226
TOTAL	948	971	890	1,069

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	2,319	2,567	2,415	2,267
Export	2,010	1,902	1,801	1,867
TRADE BALANCE	-309	-665	-614	-400

FRESH VEGETABLES	2019	2020	2021	2022p
Import	823	863	893	745
Export	787	796	844	721
TRADE BALANCE	-36	-67	-49	-24

Population
67.7 m

Area
633,200 km²

GDP per Inhabitant
36,660 EUR

GDP Growth
6.8 per cent

Unemployment
4.9 per cent

CPI for Food
(2015=100)
107.7

FRANCE

The French economy has been affected by the health crisis, the war in Ukraine, and the summer drought. Vegetable production in particular suffered as a result of last year's weather conditions.

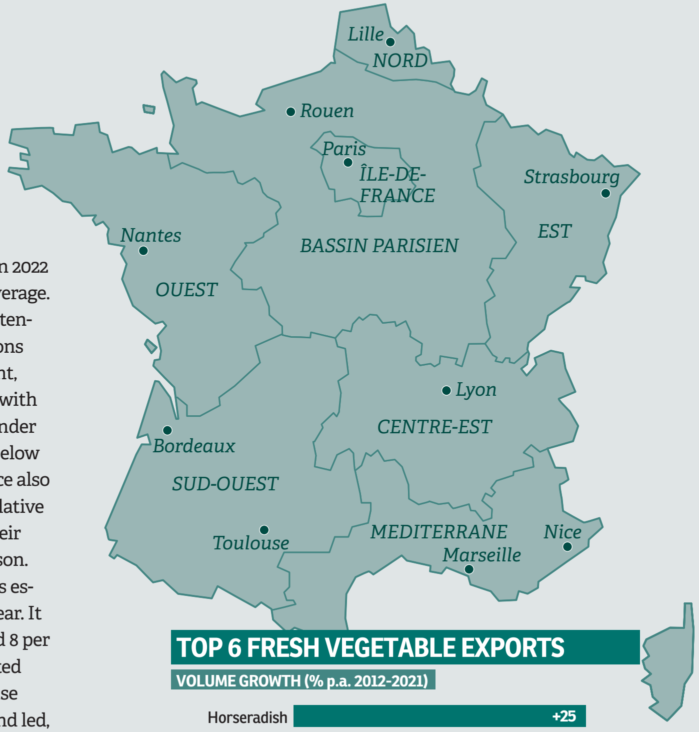
In fact, 2022 is considered to be the warmest year in France since the beginning of the 20th century. This included a very early period of hot weather in May, followed by three summer heatwaves. A very mild late autumn was followed by a severe onset of winter. The widespread lack of rain in spring and summer, combined with those high temperatures, led to record dryness of surface soils across the country. Thunderstorms, however, were numerous. They were often violent and sometimes brought huge hailstones, violent squalls and heavy rain. The months of May and October were each the warmest since 1900. And conversely, the year was poor as far as precipitation, especially in May and July, which recorded record rainfall deficits.

Vegetable production is estimated to be lower in 2022 than in 2021, and 4 per cent below the three-year average. The tomato crop is smaller, as the cost of energy-intensive greenhouse production has risen sharply. Onions suffered heavily from the summer heat and drought, with the low groundwater table causing problems with irrigation in certain regions. In addition, the area under cultivation decreased significantly, so volume fell below the record 2021 harvest. Chicory producers in France also faced multiple challenges – high energy costs, legislative changes, and a ban on weedkiller – that reduced their harvest and will lead to lower production next season.

France's total fruit harvest, on the other hand, is estimated to be higher in 2022 than in the previous year. It will also be above the three-year average by around 8 per cent. For stonefruit and pears in particular, harvested volume are significantly higher year on year, because heavy frosts in spring 2021 decimated both crops and led, in some cases, to the smallest harvest in 30 years.

Spain, Germany, and Belgium remain the three most important importers of French fruit and vegetables. However, last year's imported volumes fell slightly compared with the previous 12 months. The trade balance remained negative, as in previous years.

The health crisis, triggered by the corona pandemic, and the continued war in Ukraine weigh heavily on the global economy. And although inflation in France is somewhat lower than in other parts of Europe, the mood is still tense. Since the start of summer 2022, inflation has been around 6 per cent. Energy prices are skyrocketing, transport costs are rising, and food price inflation is just as evident. France's agricultural production costs have risen so much that food has now become a major driver of inflation. In November 2022, fresh vegetables cost 21 per cent more and fruit was about 8 per cent more expensive compared with the previous year.



PRODUCTION

VOLUME ('000 tonnes)

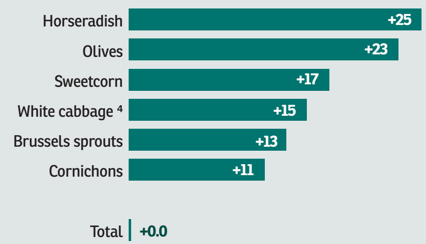
FRESH FRUIT [1]	2019	2020	2021	2022p
Apples	1,651	1,337	1,383	1,468
Melons	248	290	272	294
Bananas	218	208	229	235
Plums [2]	205	226	97	231
Pears	121	133	58	137
Apricots	135	86	57	128
Peaches	106	94	83	105
Nectarines	91	81	78	88
Strawberries	60	77	76	77
Kiwifruit	56	50	45	48
Other	217	155	225	221
TOTAL	3,108	2,737	2,603	3,032

FRESH VEGETABLES	2019	2020	2021	2022p
Carrots	534	641	708	750
Tomatoes	704	698	728	706
Onions	494	604	580	511
Sweetcorn	447	426	462	473
Green beans	339	382	371	374
Peas	282	268	271	273
Cauliflower	235	230	208	227
Lettuce	216	191	181	177
Leeks	149	170	163	167
Witloof chicory	140	171	171	136
Other	2,257	2,020	1,846	1,891
TOTAL	5,263	5,160	4,981	4,935

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

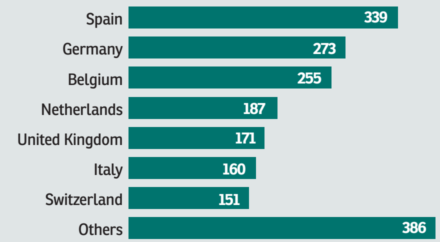
TOP 6 FRESH VEGETABLE EXPORTS

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



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2021)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	699	738	798	789
Oranges	497	479	454	495
Clementines	346	363	370	387
Watermelons	227	240	254	263
Avocados	165	171	182	190
Lemons	140	149	141	156
Melons	175	164	172	141
Others	1,183	1,125	1,255	1,147
TOTAL	3,433	3,429	3,626	3,568

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	517	508	516	532
Sweet peppers	152	166	170	169
Courgettes	152	155	149	145
Carrots	154	165	158	137
Onions	141	127	126	111
Cucumbers	71	70	65	70
Others	719	695	770	677
TOTAL	1,907	1,886	1,954	1,841

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	381	410	309	367
Bananas	207	182	224	231
Watermelons	41	54	70	76
Oranges	39	46	36	44
Melons	37	33	34	35
Others	252	244	245	277
TOTAL	957	970	918	1,030

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	235	252	277	290
Onions	99	104	74	128
Beans	108	113	125	119
Cauliflower [3]	121	109	102	113
Peas	69	65	84	78
Carrots	79	74	59	60
Other	312	286	306	249
TOTAL	1,023	1,002	1,027	1,037

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	3,790	4,118	4,335	4,377
Export	1,121	1,175	1,162	1,307
TRADE BALANCE	-2,670	-2,943	-3,173	-3,070

FRESH VEGETABLES	2019	2020	2021	2022p
Import	2,187	2,280	2,389	2,431
Export	1,062	1,077	1,179	1,195
TRADE BALANCE	-1,125	-1,203	-1,210	-1,236

Population
83.2 m

Area
357,300 km^2

GDP per Inhabitant
43,290 EUR

GDP Growth
2.6 per cent

Unemployment
2.5 per cent

CPI for Food
(2015=100)
109.2

GERMANY

Germany's fruit and vegetable markets had to find their feet amid a difficult environment in 2022. On the production side, the summer drought, a sharp rise in input costs, and a lack of available labour were the biggest challenges. With the start of the war in Ukraine, fertiliser and energy prices rocketed. High energy prices were a particular challenge for greenhouse-based production.

For vegetable growers, 2022 was characterized by market turbulence and weather extremes. At the beginning of the year, large stocks of carrots, onions and whole-head cabbage from the previous year's harvest were still available, which meant prices were low. This is reflected in the country's foreign trade data. The fact that vegetable imports were unable to match the high level of the previous year was largely due to lower imports of onions and carrots. The season for outdoor vegetables began early and with rapidly rising volumes. As a result, producer prices were under pressure early on, and higher production costs could not be compensated by higher selling prices. The tight market situation was not just a result of the large supply. Rather, it became clear early in the year that the general public would be a little cautious in terms of its spending. Although vegetables were rarely a price driver last year, consumers nevertheless felt a lot of uncertainty after the pandemic. This took sales back to just above 2019 levels.

Then, with the summer came the drought. From July onwards, it hardly rained at all in many regions. Vegetable crops were irrigated where possible, but this was not enough to achieve average yields. Certain plantings of lettuce or cabbage failed entirely. With less product on offer, the market turned around and producers achieved higher prices. Rainfall in September, together with high temperatures, brought late growth for some autumn production and stocks in storage. Carrots and cabbage benefited, but the rain came too late for onions.

The 2022 fruit harvest is expected to be just under 3 per cent bigger than in the previous year. The increase is mainly attributed to apples and stonefruit such as sweet cherries and plums. Stonefruit took advantage of favourable weather conditions during flowering and fruit development. Due to the high temperatures in spring, the strawberry harvest began five to seven days earlier than in other years. Large quantities could be harvested in foil tunnels as early as mid-May. However, sales of these early strawberries did not go well, as the market was still dominated by late imports from the Mediterranean region and greenhouse product from the Benelux. For stonefruit, there was almost no damage from late frosts, which meant fruit set was good to very good. This led to a large crop of sweet cherries, while for plums the summer drought prevented a larger harvest. Fruit set was also good for apples in 2022. However, fruit size growth lagged due to the prolonged drought during the summer months. Consumers' continued reluctance to buy apples proved a problem, one seen in previous years but which was more intense in 2022. Overall, fruit purchases failed to match the numbers seen during the two years of the pandemic.

PRODUCTION

VOLUME ('000 tonnes)

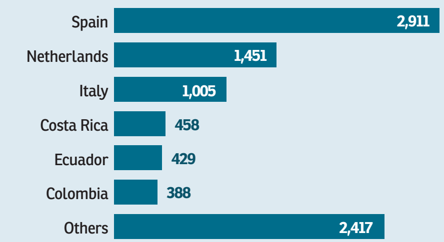
FRESH FRUIT [1]	2019	2020	2021	2022p
Apples	992	1,023	1,005	1,034
Strawberries	144	152	131	126
Plums	47	47	40	42
Sweet cherries	45	37	27	39
Pears	43	39	37	35
Blueberries	15	11	16	17
Currants	11	12	14	13
Sour cherries	16	13	11	13
Mirabelle plums	5	5	5	4
Other	14	13	16	15
TOTAL	1,330	1,352	1,301	1,338

FRESH VEGETABLES [2,3]	2019	2020	2021	2022p
Carrots	791	802	962	670
Onions	522	540	664	519
White cabbage	449	446	435	391
Gherkins	183	149	171	187
Red cabbage	125	125	142	128
Iceberg lettuce	139	128	131	126
Asparagus	131	118	119	113
Beetroot	96	99	110	102
Spring onions	85	90	74	89
Other	1,187	1,196	1,248	1,174
TOTAL	3,707	3,693	4,057	3,499

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

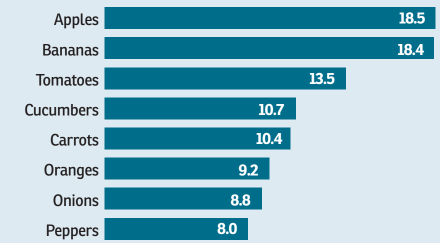
FRESH FRUIT AND VEGETABLE IMPORTS

BY ORIGIN ('000 tonnes, 2021)



TOP 8 FRUIT AND VEGETABLES 2021

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	1,340	1,353	1,420	1,311
Apples	495	550	510	456
Oranges	464	499	485	442
Watermelons	473	513	437	391
Easy peelers	356	393	402	378
Table grapes	322	347	333	332
Lemons	189	233	221	190
Pears	157	158	167	171
Pineapples	149	127	131	127
Other	1,485	1,459	1,390	1,342
TOTAL	5,431	5,632	5,495	5,141

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	720	743	756	643
Cucumbers/Gherkins	531	589	598	522
Peppers	387	419	420	383
Lettuce	297	306	329	289
Onions	277	246	236	195
Carrots	275	252	242	187
Courgettes	98	111	111	94
Cauliflower	74	81	83	92
Mushrooms	94	92	89	76
Other	613	664	701	585
TOTAL	3,366	3,503	3,564	3,066

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	283	301	341	322
Apples	64	56	61	52
Table grapes	26	26	23	23
Oranges	23	22	23	18
Other	204	204	192	185
TOTAL	598	610	640	600

FRESH VEGETABLES	2019	2020	2021	2022p
White cabbage	58	50	61	63
Onions	59	65	52	61
Lettuce	49	46	48	52
Carrots	56	44	56	30
Other	236	213	225	183
TOTAL	458	417	442	389

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	6,121	7,043	6,926	6,800
Export	713	726	728	713
TRADE BALANCE	-5,408	-6,317	-6,198	-6,087

FRESH VEGETABLES	2019	2020	2021	2022p
Import	4,656	5,049	4,385	5,127
Export	423	404	438	398
TRADE BALANCE	-4,233	-4,644	-3,947	-4,729

Population
10.7 m

Area
132,000 km²

GDP per Inhabitant
17,010 EUR

GDP Growth
8.4 per cent

Unemployment
8.6 per cent

CPI for Food
(2015=100)
101.8

GREECE

Greece has a positive trade balance for both fruit and vegetables. After a sharp decline in 2019, the value of its fruit and vegetable exports has recovered more recently. Fruit plays a much larger role in that trade than vegetables do: while around 39 per cent of the fruit harvest leaves the country, only around 9 per cent of the vegetable harvest is exported. The most important fruit export products include oranges, watermelons, kiwifruit and apples, while for vegetables the main items exported are tomatoes, onions, peppers and cucumbers. For years, Romania and Bulgaria have been important destination markets, but Germany and Poland also feature. Greece only imports a small volume of fruit and vegetables.

This has to do with economic conditions, but also the fact that Greece's climate allows it to grow almost all product types.

Fruit production is more extensive than vegetables. Citrus is the largest sector, but there is more focus on oranges compared with other Mediterranean suppliers. In the space of just a few years, Greece has become Europe's an important strawberry exporter and, with an export volume of 68,000 tonnes, was second only to Spain in 2021. Last year, it exported even more and, in March and April, filled gaps in supply caused by bad weather conditions in Spain. According to initial projections, Greek strawberry exports could amount to around 74,000 tonnes in 2022. That would be an increase of 9 per cent in a single year. As a result, expansion of planted area continues.

There is a similar story unfolding in the country's kiwifruit business. Greece is now the second-largest producer of kiwifruit in Europe, and this positive development is likely to continue in the coming years. Over a decade, the area under kiwifruit production has almost doubled from 6,400ha to around 12,000ha. This has resulted in increasing volumes – 355,400 tonnes were harvested in 2022, 14 per cent up on the previous year. Significantly more stonefruit was harvested last year too, after frost damage in 2021. The quantity of peaches and nectarines picked in 2022 was significantly more than in the previous campaign.

Fruit vegetables make up the largest part of Greece's vegetable crop. Most, like tomatoes, cucumbers, courgettes and peppers, are grown under protective structures. A high proportion of the greenhouse area used for vegetables is occupied by high tunnels. Crete is the country's most important region for greenhouse cultivation. Other important open-field crops are onions and leafy vegetables.

PRODUCTION

VOLUME ('000 tonnes)

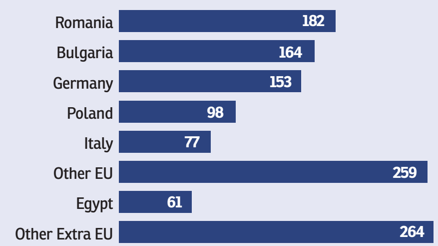
FRESH FRUIT	2019	2020	2021	2022p
Oranges	849	887	818	891
Watermelons	345	431	481	450
Kiwifruit	245	272	311	355
Apples	276	280	246	294
Table grapes	273	273	267	224
Peaches [1]	216	185	111	209
Easy peelers	151	172	145	152
Nectarines	119	105	50	144
Apricots	80	78	55	65
Other	387	438	390	438
TOTAL	2,940	3,120	2,874	3,221

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes [1]	463	536	582	553
Onions	134	172	136	146
Peppers	155	164	138	145
Cucumbers	129	137	134	131
Spinach	74	67	94	89
Lettuce	70	75	82	76
Cabbage	70	69	65	63
Courgettes	66	64	61	60
Aubergines	55	61	60	58
Other	229	237	248	242
TOTAL	1,445	1,583	1,601	1,563

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

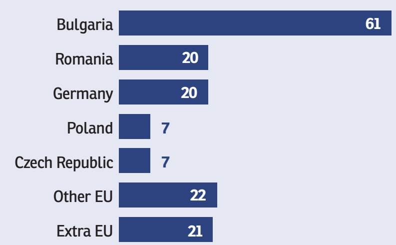
FRESH FRUIT EXPORTS 2021

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2021

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	215	206	210	205
Lemons	22	25	22	27
Apples	26	21	31	25
Pineapples	15	13	17	18
Other	34	35	38	28
TOTAL	312	300	318	303

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes [1]	18	14	20	21
Mushrooms	11	10	13	13
Onions	35	18	11	8
Other	41	35	34	39
TOTAL	105	77	78	81

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Oranges	265	323	329	263
Watermelons	188	205	209	191
Kiwifruit	172	167	163	183
Easy peelers	115	119	132	123
Strawberries	45	55	68	74
Apples	89	75	78	73
Peaches	103	94	39	63
Bananas	56	54	52	57
Table grapes	63	68	54	55
Nectarines	61	66	20	54
Cherries	23	32	27	24
Other	88	106	87	90
TOTAL	1,268	1,363	1,258	1,250

FRESH VEGETABLES	2019	2020	2021	2022p
Cucumbers	38	37	48	50
Tomatoes	35	36	39	31
Peppers	8	10	10	9
Other	54	50	61	55
TOTAL	135	133	158	145

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	222	217	230	246
Export	782	944	912	974
TRADE BALANCE	+560	+727	+682	+728

FRESH VEGETABLES	2019	2020	2021	2022p
Import	90	74	85	94
Export	95	104	138	132
TRADE BALANCE	+5	+30	+53	+38

Population
59.2 m

Area
302,100 km²

GDP per Inhabitant
30,150 EUR

GDP Growth
6.7 per cent

Unemployment
5.3 per cent

CPI for Food
(2015=100)
105.0

ITALY

2022 was a difficult year for Italy's fruit and vegetable sector. The impact of climate change was keenly felt, with drought between May and August and a heatwave in July and August. For vegetable crops especially, yields were below the normal level, and around 4 per cent less than the previous year in total. At 10.78m tonnes, the fruit harvest was 9 per cent larger than in 2021, when crops were hit hard by a spring frost.

Italy's foreign trade balance worsened last year. Not only were exports lower than in the previous campaigns, due to the tight supply situation and weaker demand from abroad, but the country also had to meet demand for some vegetables through imports.

In addition, the Ukraine war had consequences: uncertainty among the population, inflation, and consumer reluctance to buy. According to GfK Italia, Italian households bought around 8 per cent less fruit and vegetables in the first three-quarters of 2022 than they did in the same period of 2021. The volume of produce purchased was the lowest in the last five years.

Conditions for growers are increasingly difficult. Availability of plant protection products continues to decline, which makes it increasingly difficult to protect crops from diseases and pests. There is also a shortage of labour for harvesting and packaging. Rising costs in the whole supply chain cannot always be covered entirely by the prices achieved on the market. In addition, Italy has felt competitive pressure from abroad for years. In the case of peaches and nectarines, for example, Spain can produce more cost effectively. Or looks at the pear category, where Italy has lost market share to Belgium and the Netherlands following a much smaller harvest in 2021. As a result of this difficult situation, planted area for pears, table grapes, and peaches and nectarines has again contracted.

PRODUCTION

VOLUME ('000 tonnes)

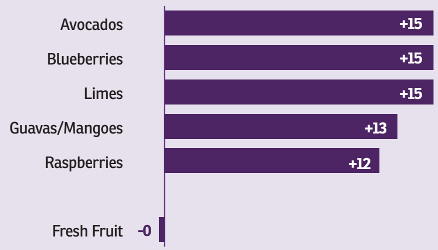
FRESH FRUIT	2019	2020	2021	2022p
Apples	2,096	2,124	2,053	2,150
Oranges	1,650	1,773	1,771	1,959
Melons	1,266	1,297	1,285	1,255
Table grapes	1,078	1,064	1,041	932
Easy peelers	669	660	826	825
Nectarines	609	372	350	537
Pears	363	611	202	474
Peaches [2]	534	380	353	469
Lemons	446	473	467	465
Others	1,711	1,571	1,469	1,718
TOTAL	10,421	10,325	9,817	10,785

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes [2]	1,049	1,049	1,066	1,080
Courgettes	569	600	602	560
Lettuce	487	487	750	560
Carrots	492	494	498	525
Fennel	524	514	501	500
Onions	478	458	416	400
Artichokes	379	367	376	380
Cauliflower/Broccoli	368	365	360	350
Aubergines	301	305	306	330
Sweet peppers	250	248	244	245
Others	2,315	2,325	2,743	2,670
TOTAL	7,211	7,212	7,862	7,600

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

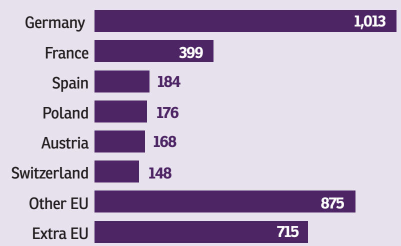
TOP 5 FRESH FRUIT EXPORTS

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



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2021)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	757	810	811	800
Oranges	191	243	133	235
Pineapples	160	136	151	145
Pears	91	87	128	130
Others	849	774	763	755
TOTAL	2,048	2,050	1,986	2,065

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes [2]	141	131	128	160
Lettuce	136	115	116	150
Sweet peppers	98	95	91	90
Others	358	310	303	365
TOTAL	733	651	638	765

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	909	911	908	860
Table grapes	424	469	466	440
Watermelons	233	320	282	275
Kiwifruit	312	276	269	265
Peaches/Nectarines	157	78	98	130
Bananas	79	81	104	100
Oranges	109	113	129	95
Easy peelers	68	61	53	55
Apricots	48	17	32	50
Others	376	305	304	280
TOTAL	2,667	2,614	2,613	2,500

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Lettuce	210	193	195	205
Cauliflower/Broccoli	73	78	91	80
Carrots	89	107	98	80
Kohlrabi/Kale	65	70	79	65
Beetroot	60	58	58	60
Tomatoes	66	63	70	55
Fennel	54	62	59	45
Spinach	23	28	39	40
Onions	33	27	36	25
Others	171	176	186	165
TOTAL	844	862	911	820

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	1,764	1,879	1,882	2,065
Export	2,735	2,935	3,082	3,165
TRADE BALANCE	+971	+1,056	+1,200	+1,100

FRESH VEGETABLES	2019	2020	2021	2022p
Import	824	728	810	1,065
Export	1,361	1,396	1,591	1,550
TRADE BALANCE	+537	+668	+781	+485

Population 17.5 m

Area 41,500 km²

GDP per Inhabitant 48,840 EUR

GDP Growth 4.9 per cent

Unemployment 3.1 per cent

CPI for Food (2015=100) 110.0

NETHERLANDS

The Netherlands might be one of Europe's smaller countries, but its long coastline means it punches above its weight as an important trading hub for fruit imports and exports. Its production might also be relatively modest, but it exported a huge amount of fresh fruit in 2022 – second only to Spain among EU countries. At the same time, a lot of fruit reaches Europe from overseas via Dutch ports.

As in many central European countries, high temperatures and a lack of rainfall were a challenge for the Netherlands last year. Area restrictions and lower yields led to a decline in onion production, for example. In total, the Dutch onion harvest was estimated at 1.49m tonnes, a decrease of 16 per cent compared with the previous year.

For carrots, production in the Netherlands decreased even more sharply. According to first official estimates, cultivated area for winter and storage carrots was down 19 per cent to 5,448ha compared with 2021. The area under carrots not intended for storage was almost 22 per cent lower at 2,201ha. Such large changes in area are unprecedented. These current restrictions are due to low prices and challenging quality in past seasons.

Compared with vegetables, fruit production is much lower. The main crops are topfruit like apples and pears, as well as strawberries. The trend calculation between 2013 and 2022 shows an average annual loss of area around 4 per cent or 251ha for apples. But for pears, there was an average increase in area of 2 per cent or 185ha per year. The most important apple varieties grown in the Netherlands are Elstar and Jonagold (including Jonagored). In pears, Conference dominates with a share of three-quarters of the total area. A similar volume of apples was harvested in 2022 as in the previous year. For pears, however, it was about 8 per cent more than in 2021.

The energy crisis had a massive impact on greenhouse production in the winter of 2022/23. With the increase in gas prices and energy costs for lighting, strawberry production in the Benelux is not profitable in the winter months. So, even in 2021/22, many of these facilities were run as coldstores, and production was postponed to the spring. As a result, the Dutch strawberry harvest is likely to have been smaller than in 2021.

PRODUCTION

VOLUME ('000 tonnes)

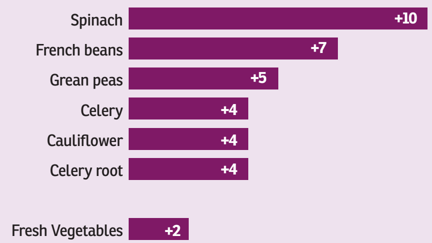
FRESH FRUIT	2019	2020	2021	2022p
Pears	373	400	340	368
Apples	272	220	243	245
Strawberries	76	78	86	85
Other berries	23	20	21	22
Other	23	31	29	29
TOTAL	767	749	718	749

FRESH VEGETABLES	2019	2020	2021	2022p
Onions	1699	1596	1788	1494
Tomatoes	910	910	880	835
Carrots	616	575	643	525
Cucumbers	410	430	440	421
Peppers	415	430	440	420
Mushrooms	270	260	260	234
Lettuce	164	167	177	171
Leeks	92	90	105	101
White cabbage	115	117	97	90
Iceberg lettuce	86	90	91	89
Celeriac	92	93	82	85
Spinach	74	72	75	76
Aubergines	62	65	63	61
Brussel sprouts	54	55	63	61
Other	425	433	492	354
TOTAL	5,484	5,383	5,695	5,017

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

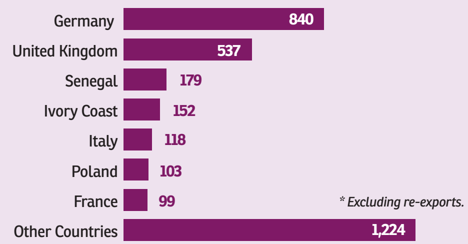
TOP 6 PRODUCTION OF FRESH VEGETABLES

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



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION* ('000 tonnes, 2021)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [2]	2019	2020	2021	2022p
Bananas	1,316	1,330	1,466	1,454
Oranges	595	622	621	543
Table grapes	419	401	458	493
Avocados	349	414	456	458
Mangoes	250	278	297	282
Apples	245	282	301	250
Other	1,980	2,064	2,074	2,103
TOTAL	5,154	5,391	5,673	5,583

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	230	227	243	253
Onions	337	239	317	241
Cucumbers	107	107	96	108
Peppers	94	105	106	98
Other	728	729	822	763
TOTAL	1,496	1,407	1,584	1,463

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [2]	2019	2020	2021	2022p
Total [1]	4,208	4,333	4,450	4,353
Dutch origin only				
Pears	212	203	208	212
Strawberries	21	18	23	22
Apples	44	57	24	21
Other	4	4	7	1
TOTAL	281	282	262	256

FRESH VEGETABLES	2019	2020	2021	2022p
Total [1]	5,027	5,043	5,013	5,001
Dutch origin only				
Onions	967	1,266	1,205	1,266
Tomatoes	738	725	721	697
Peppers	314	329	340	356
Cucumbers	317	311	334	320
Cabbage	94	89	101	108
Carrots	62	48	51	47
Other	237	237	238	189
TOTAL	2,729	3,005	2,990	2,983

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT [2]	2019	2020	2021	2022p
Import	6,381	6,991	7,096	7,401
Export [1]	6,080	6,898	7,063	7,024
TRADE BALANCE	-301	-93	-33	-377

FRESH VEGETABLES	2019	2020	2021	2022p
Import	1,699	1,694	1,834	1,891
Export [1]	5,378	5,733	5,684	5,995
TRADE BALANCE	+3,679	+4,039	+3,850	+4,104

Population 21.7 m

Area 819,900 km²

GDP per Inhabitant 51,490 EUR

GDP Growth 4.3 per cent

Unemployment 5.1 per cent

CPI for Food (2015=100) 107.2

NORDIC COUNTRIES

DENMARK, FINLAND, SWEDEN

As in many other countries, the sharp rise in energy costs and the cost of living are major issues in Denmark, Finland and Sweden. In particular, producers of vegetables under glass have struggled with the high energy rates. Traditionally, the industry accounts for a high proportion of total vegetable production, especially in Finland. But in the winter of 2022/23, it saw a significant reduction in output. As recently as September, volume decreases of 50 per cent were expected for tomatoes, and between 10 and 20 per cent for cucumbers, lettuce and herbs. In fact, the decrease is likely to have been even more significant. However, for the time being, overall fruit and veg production in the Nordic countries has not been affected by these declines in greenhouse cultivation. In Denmark, Finland and Sweden, slightly larger volumes were harvested in 2022 than in the previous year. The harvested volume of fruit seen in 2020 was probably not matches, although this might just be the case for vegetables. In total, an estimated 132,000 tonnes of fruit were harvested in the three countries. In Denmark and Sweden, a year-on-year increase was mainly due to a larger apple harvest. The larger vegetable harvest, estimated at 995,000 tonnes in total, was attributed largely to bigger onion harvests in the same two countries.

Rising energy prices and higher transport costs affected the international flow of goods. Imports of fresh fruit and vegetables, which are vital in a region that can only grow a limited volume of these products depends due to its climate, were slightly lower in 2022 than in previous years. As a result, the share of imports fell slightly. For fruit, imports accounted for a good 90 per cent of total market supply; in the case of vegetables, imports covered just under 39 per cent of total demand. Together, Denmark, Finland and Sweden imported about 1.23m tonnes of fresh fruit and 620,000 tonnes of fresh vegetables last year. The downward trend was evident in all three countries, where banana volumes in particular were consistently lower. Orange imports also failed to match the volume seen in the previous year, but this was due in part to limited availability in countries of origin. The decline in apple imports, on the other hand, was the result of higher domestic production. With vegetables, however, the causes were less clear cut. Volume reductions in fruit vegetables such as tomatoes and cucumbers were most noticeable. Exports developed in different ways: in the case of fruit, export volumes remained well below those of the previous year; in contrast, more vegetables were exported, mainly due to an increase in carrot exports from Denmark. As a result of the decline in imported volumes, the Nordic countries' foreign trade balance improved slightly. However, the value of imports still significantly exceeds that of exports.

Social restrictions to combat the pandemic were completely lifted in all three countries last year. As a result, public life returned to normal with restaurant visits and holiday travel. The restaurant industry also benefited from the return of foreign tourists. At the same time, as in other countries, shoppers also cut back slightly on fruit and vegetable purchases amid concern over higher living costs.

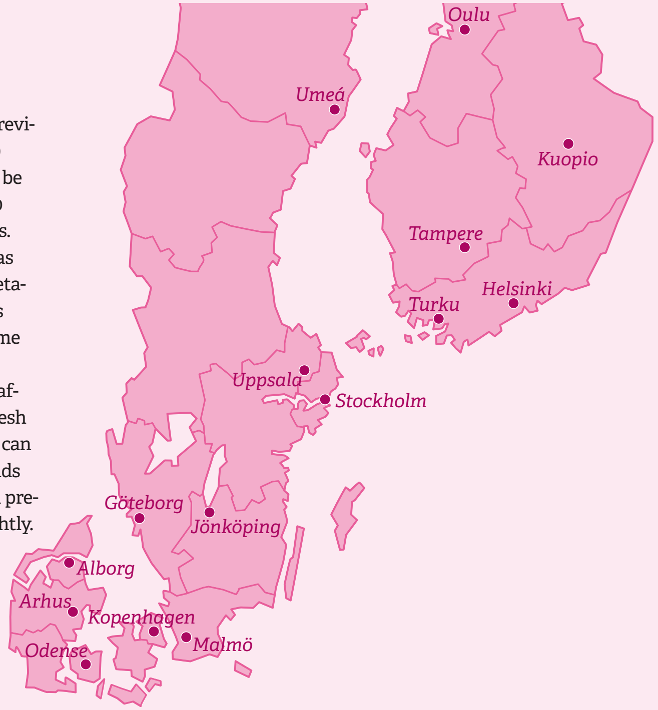
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Denmark	**43**	**58**	**48**	**56**
– Apples	15	24	18	24
– Pears	4	6	6	7
– Strawberries [2]	6	6	6	6
Finland	**29**	**25**	**28**	**27**
– Strawberries [2]	18	15	16	17
– Apples	8	7	8	8
Sweden	**39**	**52**	**46**	**49**
– Apples	20	32	27	30
– Strawberries [2]	16	17	16	17
TOTAL	**111**	**135**	**122**	**132**

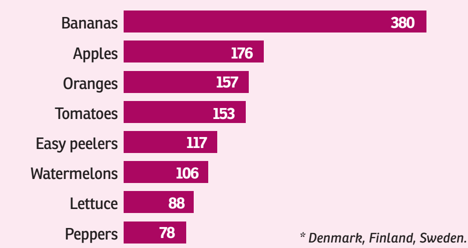
FRESH VEGETABLES [1]	2019	2020	2021	2022p
Denmark	**300**	**303**	**287**	**292**
– Carrots	105	94	82	84
– Onions	61	70	61	69
– White cabbage	24	26	15	16
Finland	**294**	**297**	**284**	**290**
– Carrots	77	81	76	79
– Tomatoes	40	41	38	36
Sweden	**346**	**395**	**409**	**413**
– Carrots	107	118	123	120
– Onions	50	65	55	61
TOTAL	**941**	**995**	**980**	**995**

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



FRUIT AND VEGETABLE IMPORTS 2021

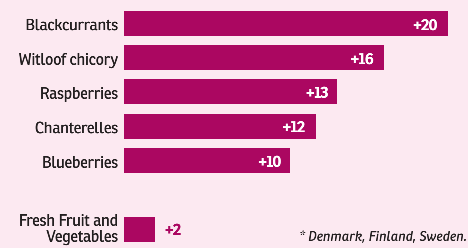
BY NORDIC COUNTRIES* ('000 tonnes)



* Denmark, Finland, Sweden.

TOP 5 FRUIT AND VEGETABLE IMPORTS

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



* Denmark, Finland, Sweden.

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Denmark	**425**	**397**	**412**	**369**
– Bananas	89	76	83	80
– Oranges	55	48	47	46
– Apples	51	53	59	42
Finland	**333**	**329**	**318**	**261**
– Bananas	110	110	109	93
– Apples	42	42	33	27
Sweden	**677**	**690**	**680**	**605**
– Bananas	191	188	189	174
– Oranges	75	76	79	69
TOTAL	**1,435**	**1,416**	**1,410**	**1,235**

FRESH VEGETABLES	2019	2020	2021	2022p
Denmark	**223**	**206**	**219**	**187**
– Tomatoes	38	37	38	36
– Cucumbers	24	23	25	23
– Lettuce	25	24	26	22
Finland	**132**	**117**	**119**	**103**
– Tomatoes	27	26	25	22
– Lettuce	26	23	24	22
Sweden	**365**	**355**	**355**	**330**
– Tomatoes	86	88	89	79
– Cucumbers	38	38	37	34
TOTAL	**720**	**678**	**693**	**620**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Denmark	**47**	**43**	**37**	**30**
– Apples	7	9	8	6
– Bananas	11	2	2	2
Finland	**6**	**6**	**7**	**6**
Sweden	**55**	**44**	**50**	**44**
TOTAL	**108**	**92**	**93**	**80**

FRESH VEGETABLES	2019	2020	2021	2022p
Denmark	**54**	**54**	**53**	**61**
– Carrots	26	31	30	33
– Onions	7	5	5	7
Finland	**2**	**2**	**2**	**5**
Sweden	**19**	**18**	**20**	**17**
TOTAL	**75**	**74**	**75**	**82**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	1,633	1,737	1,739	1,569
Export	136	124	122	109
TRADE BALANCE	**-1,497**	**-1,613**	**-1,617**	**-1,461**

FRESH VEGETABLES	2019	2020	2021	2022p
Import	1,110	1,122	1,208	1,094
Export	139	134	146	147
TRADE BALANCE	**-970**	**-988**	**-1,063**	**-947**

Population *37.8 m*

Area *312,700 km²*

GDP per Inhabitant *15,060 EUR*

GDP Growth *6.8 per cent*

Unemployment *2.1 per cent*

CPI for Food *(2015=100) 114.3*

POLAND

The drought caused problems for many of Poland's vegetable growers in 2022. In the spring, a lack of rain during planting and sowing ultimately resulted in lower yields for certain crops. Only by the autumn had the weather conditions improved with the arrival of rain. In total, the country's 2022 vegetable harvest is estimated at about 5.5m tonnes. Among the main crops, decreases were noted in tomatoes, carrots and cabbage. For the latter, this represents a continued decline.

As in previous years, producers had to cope with rising costs. The outbreak of the Ukraine war and the resulting energy crisis meant further cost increases for producers of stored vegetables, as well as those growing fruit vegetables in greenhouses, and mushroom producers. Because of the crisis, planted area for these products may be restricted in 2023. However, there were opportunities last year for Poland to export vegetables to south-east Europe, where local harvests were affected by drought. This helped boost exports significantly to an estimated 910,000 tonnes.

At 4.5m tonnes, Poland's apple harvest exceeded the previous year's level. On the domestic market, an inflation rate of 14 per cent affected demand. For exports, apple shipments to eastern Europe came to a near standstill. Plus, due partly to the fact that the Egyptian market – an increasingly important outlet in recent years – must use foreign currency to purchase expensive wheat, exports were expected to be weaker than in previous years. Elsewhere, the stonefruit harvest was above average in 2022. And there are new developments in Polish strawberries – traditionally, this industry has been geared strongly to the processing sector, but now production for fresh is gaining market share. There has also been ivestment in planted area for raspberries. However, poor weather in 2022 meant the full potential of this production could not be achieved. The strongest volume growth for berries is in blueberries, which again saw a record harvest.

In 2021, Poland's average annual per-capita consumption was 104kg for vegetables and 59kg for fresh fruit. However, consumer price inflation has created more reluctance to buy fruit and vegetables in Poland. For this reason, the recent trend towards increased fresh produce demand was not expected to continue in 2022.

PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2019	2020	2021	2022p
Apples	2,910	3,410	4,300	4,495
Strawberries	177	144	156	185
Sour cherries	152	157	167	183
Currants	126	146	152	152
Plums	95	112	117	132
Raspberries	76	123	104	111
Pears	70	65	70	95
Sweet cherries	44	44	59	79
Blueberries	35	55	55	64
Other	108	166	141	143
TOTAL	3,793	4,422	5,321	5,639

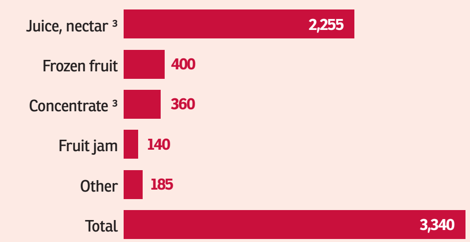
FRESH VEGETABLES [2]	2019	2020	2021	2022p
Tomatoes	918	741	813	796
Cabbage	837	710	687	650
Onions	535	660	617	644
Carrots	678	671	638	603
Cucumbers	519	448	432	433
Mushrooms	335	340	345	340
Beetroot	281	261	239	234
Cauliflower	207	150	130	136
Other	1,043	1,259	1,468	1,713
TOTAL	5,354	5,240	5,369	5,549

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

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

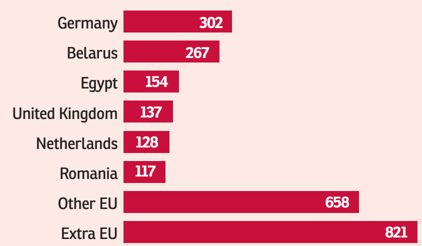
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2021/22)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2021)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	459	564	523	475
Oranges	172	156	169	175
Easy peelers	168	161	168	165
Watermelons	152	161	187	165
Lemons	123	136	135	130
Other	661	660	658	620
TOTAL	1,612	1,702	1,705	1,600

FRESH VEGETABLES	2019	2020	2021	2022p
Onions	205	151	158	240
Tomatoes	161	175	174	185
Cucumbers	65	63	71	80
Peppers	74	72	68	70
Other	322	318	313	360
TOTAL	827	779	784	935

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	974	647	917	695
Pears	73	99	117	80
Bananas	66	85	70	60
Cider apples	17	13	22	28
Blueberries	14	18	22	22
Easy peelers	20	20	18	20
Strawberries	6	15	19	15
Other [4]	113	98	108	85
TOTAL	1,283	995	1,293	1,005

FRESH VEGETABLES	2019	2020	2021	2022p
Mushrooms	212	202	232	250
Onions	126	144	134	188
Tomatoes	75	72	67	85
Cabbage	29	31	44	85
Carrots	23	22	26	60
Peppers	29	28	22	25
Cauliflower, Broccoli	21	24	23	20
Other	184	166	186	195
TOTAL	699	689	734	910

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	1,357	1,498	1,557	1,660
Export	622	647	727	695
TRADE BALANCE	-735	-851	-830	-965

FRESH VEGETABLES	2019	2020	2021	2022p
Import	760	788	860	980
Export	755	708	771	940
TRADE BALANCE	-5	-80	-89	-40

Population 10.3 m

Area 92,200 km²

GDP per Inhabitant 20,840 EUR

GDP Growth 5.5 per cent

Unemployment 4.4 per cent

CPI for Food (2015=100) 104.6

PORTUGAL

Portugal is often overshadowed by its larger Iberian neighbour, but its own fresh produce output is considerable. Harvests in 2021 were notably larger than usual, but in 2022 results returned to near-normal. For some crops, the persistent summer heat and drought had a significant negative impact on yields. This applies to stonefruit, pipfruit and some vegetables. The 12 months from November 2021 to October 2022 were the driest since 2004/05, and average temperatures reached the record set in 2016/17. Significant rainfall was only seen in September and October.

While the first official harvest estimates for 2022/23 are already available for most fruit categories, figures for vegetables have not yet been published. But data for production of tomatoes for processing, which accounts for 50-60 per cent of Portugal's total vegetable production, offer an indication of smaller yields.

The recent apple harvest is estimated to be about 20 per cent shorter than in the previous year, with lower yields noted for earlier varieties. Late varieties fared better thanks to the September rainfall. Pear production fell 45 per cent to 124,000 tonnes, the smallest crop since 2016. Besides unfavorable weather conditions, a fungal disease called Stemphylium was partly responsible for the decrease.

Portugal's kiwifruit exports have also benefited from an anticyclical harvest rhythm of late. In contrast with major producers Italy and Greece, the country turned out a big crop in 2021/22, which also enabled record exports last year. The latest harvest, on the other hand, is expected to be smaller again. As in neighbouring Galicia in Spain, the summer heat had a negative impact on fruit size. However, rainfall in September and October has prompted an upward revision of harvest estimates.

Citrus fruits are also a key export, especially oranges. However, the biggest growth over the past decade has been in soft fruit production and exports. This involves raspberries and blueberries in particular, exports of which have more than doubled since 2016.

For fruit exports, Portugal's main destination is Spain, which takes more than half of the volume. France follows with a good 14 per cent. Only 13 per cent leaves the EU, mainly to the UK and Brazil.

As indicated above, vegetable production for the fresh market decreased in 2022 due to the heatwaves and drought in July and August. Most vegetable crops are sold on the domestic market, with exports only important for a few crops. Those export sales usually depend more on the local supply situation in destination markets, rather than the situation at home. For example, high stocks in north-western Europe left little room for Portugal to export its early carrots. The same holds true for cabbages, mainly Savoy and pointed cabbage. Pumpkins also play a prominent role in Portugal's vegetable production and became the country's top export article in 2022. In no other European country does this item sit in fourth place or higher when it comes to vegetable production.

The main export destinations for vegetables are Spain and France, with 16 per cent heading outside the EU.

PRODUCTION

VOLUME ('000 tonnes)

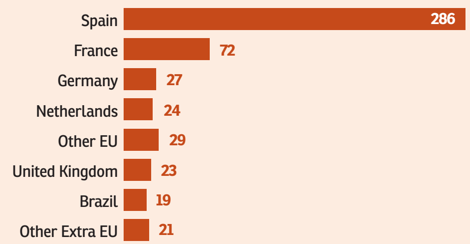
FRESH FRUIT	2019	2020	2021	2022p
Oranges	347	355	364	350
Apples [1]	371	287	368	293
Pears	198	131	225	124
Melons	40	62	60	60
Kiwifruit	44	46	55	50
Easy peelers	42	42	43	40
Raspberries	27	25	28	30
Watermelons	23	28	31	30
Peaches	45	35	42	29
Blueberries	15	15	17	18
Other	107	115	136	110
TOTAL	1,259	1,141	1,369	1,134

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Tomatoes [1]	91	144	150	125
Carrots	86	134	141	120
Cabbage	81	116	127	105
Pumpkins	65	121	127	105
Lettuce	51	62	75	60
Onions	62	71	66	55
Savoy cabbage	35	51	56	50
Peppers	37	55	54	45
Broccoli	38	46	40	33
Other	248	301	365	312
TOTAL	794	1,101	1,201	1,010

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

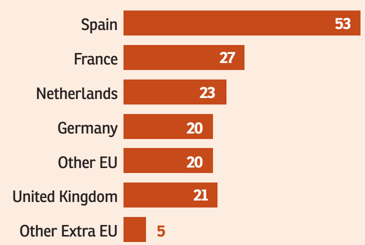
FRESH FRUIT EXPORTS 2021

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2021 [1, 2]

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	202	236	216	210
Oranges	108	149	121	100
Pineapples	77	57	60	65
Melons	57	55	48	45
Watermelons	47	43	41	45
Apples	50	47	66	40
Other	300	316	341	345
TOTAL	841	903	893	850

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Onions	68	76	75	75
Tomatoes [1]	50	45	41	43
Cauliflower	29	30	29	30
Carrots	30	25	23	24
Peppers	19	18	21	23
Pumpkins	9	14	11	9
Other	73	74	79	74
TOTAL	278	282	279	278

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Pears	103	95	88	130
Oranges	111	155	121	110
Apples	72	68	45	70
Lemons	19	28	33	45
Kiwifruit	18	16	24	29
Raspberries	26	26	27	28
Other	160	148	163	168
TOTAL	509	536	501	580

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Pumpkins	34	35	34	36
Other cabbage	29	32	34	20
Carrots	31	31	29	18
Courgettes	16	8	7	7
Tomatoes [1]	10	7	8	5
Leeks	6	5	5	5
Onions	7	6	5	5
Other vegetables	35	32	37	44
TOTAL	168	156	159	140

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	657	770	763	790
Export	609	685	650	740
TRADE BALANCE	-48	-85	-113	-50

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Import	201	203	214	225
Export	181	171	190	205
TRADE BALANCE	-20	-32	-24	-20

Population 47.4 m

Area 506,000 km²

GDP per Inhabitant 25,500 EUR

GDP Growth 5.5 per cent

Unemployment 9.6 per cent

CPI for Food (2015=100) 107.0

SPAIN

In Spain, production of both fruit and vegetables fell in 2022. This was partly due to reduced crop area, but yields were also below average due to extreme heat and drought in the summer. Water availability is a persistent and increasing problem in much of Spain's fruit and vegetable production. So cultivation plans for 2023 will also be influenced by this. For example, due to a lack of water availability and high production and export costs, the sowing of early garlic in Spain is in doubt. Planted area this season could fall significantly as a result, depending on how much water is available. This is especially the case in Castilla-La Mancha, Andalusia and Castilla y Léon.

Tree fruit production is also affected by the lack of water. For example, citrus production in 2022/23 in Spain is at its lowest level for ten years. The turbulent weather seen in 2022 is the main reason for this drop in output. Excessive rainfall was initially recorded during flowering and fruit set, before heat, drought and limited irrigation options affected crops in the following months. The persimmon harvest was also negatively affected. According to initial estimates by the Asociación Española de Tropicales, the avocado harvest will also be 25-30 per cent down on last year, with water shortages also cited as the reason.

But there are positive developments too. For example, the high energy costs and a subsequent reduction in vegetable production in central European greenhouses has opened up new sales opportunities for Spanish fruit vegetables in early spring. After a significant reduction in tomato production area over the past few years, planted area for the 2022/23 season is up by about 1,000ha in the largest producing area Almeria. What's more, prices achieved last season have made it a profitable business again. That's especially true for vine and Roma-type tomatoes, which are important for export and have seen an increase in production area as a result.

Expectations for the early strawberry market are similar. Although overall planted area for berries in Huelva is largely unchanged for 2022/23, there is an increase for strawberries, blueberries and blackberries. This contrasts with a decline in raspberry production. Competition from third countries has prompted some producers in Huelva to give up on this particular product.

In 2022, a significant reduction in Spain's fruit and vegetable production led to a strong decline in exports. However, households in Spain also significantly reduced their spending on fresh produce. According to the government, purchases of fruit from January to August were about 12 per cent lower than in the previous year. However, due to higher prices, the average household spent only 1 per cent less than in 2021. The amount of vegetables purchased even decreased by 15 per cent compared with the previous year, while spending only fell by 8 per cent.

PRODUCTION

VOLUME ('000 tonnes)

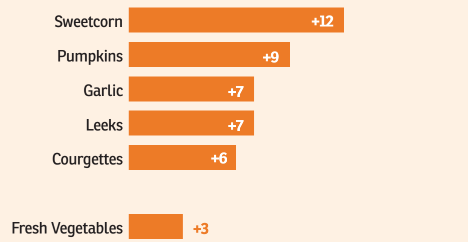
FRESH FRUIT	2019	2020	2021	2022p
Oranges	3,343	3,496	3,749	3,014
Easy peelers	1,850	2,317	2,122	1,954
Watermelons	1,211	1,235	1,382	1,003
Lemons	931	1,142	1,046	953
Melons	642	611	653	499
Apples [1]	555	425	563	431
Peaches [1]	666	534	507	392
Strawberries	352	273	361	325
Nectarines	573	486	447	323
Table grapes	332	298	305	322
Other	3,229	3,362	2,872	2,883
TOTAL	**13,684**	**14,179**	**14,007**	**12,099**

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Tomatoes [1]	2,008	1,821	1,734	1,793
Peppers [1]	1,312	1,393	1,406	1,296
Onions	1,600	1,132	1,567	1,198
Lettuce	1,009	962	1,064	832
Cucumbers	739	795	746	668
Courgettes	602	631	638	617
Broccoli	532	591	535	550
Carrots	386	393	429	386
Garlic	275	269	316	271
Other	1,928	1,984	1,995	1,886
TOTAL	**10,391**	**9,971**	**10,430**	**9,497**

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

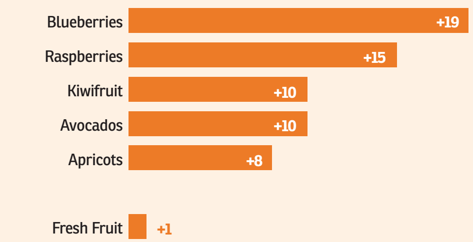
TOP 5 FRESH VEGETABLE EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2012-2021)



TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2012-2021)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	361	324	369	380
Avocados	136	174	214	208
Apples	195	180	185	190
Oranges	149	191	179	150
Other	942	980	1,073	1,098
TOTAL	**1,783**	**1,849**	**2,020**	**2,026**

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Tomatoes [1]	130	132	121	128
Beans	120	131	118	120
Onions	82	89	111	100
Other	274	263	295	317
TOTAL	**606**	**615**	**645**	**665**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Oranges	1,757	1,639	1,566	1,702
Easy peelers	1,372	1,344	1,326	1,320
Watermelons	910	840	997	973
Lemons	734	734	734	665
Melons	456	434	431	351
Strawberries	293	287	317	283
Nectarines	429	329	347	270
Peaches	400	325	344	252
Persimmons	210	211	190	186
Other	1,263	1,284	1,427	1,098
TOTAL	**7,824**	**7,427**	**7,679**	**7,100**

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Peppers	829	845	854	809
Lettuce	760	766	812	754
Cucumbers	704	703	660	700
Tomatoes	767	729	662	632
Brassicas	484	494	539	516
Courgettes	415	426	451	383
Onions	405	356	339	322
Garlic	184	189	175	168
Aubergines	159	189	166	159
Other	638	681	763	698
TOTAL	**5,345**	**5,378**	**5,421**	**5,141**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	2,009	2,222	2,372	2,510
Export	7,790	8,572	9,104	8,970
TRADE BALANCE	**+5,781**	**+6,350**	**+6,732**	**+6,460**

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Import	633	621	652	750
Export	5,600	5,922	6,464	6,900
TRADE BALANCE	**+4,967**	**+5,301**	**+5,812**	**+6,150**

Population
39.9 m

Area
498,000 km²

GDP per Inhabitant
13,400 EUR

GDP Growth
8.2 per cent

Unemployment
3.34 per cent

CPI for Food
(2015=100)
112.3

SOUTHEAST EUROPE

BULGARIA, CROATIA, HUNGARY, ROMANIA

Bulgaria, Croatia, Hungary and Romania cover a combined total of almost 500km² in south-east Europe. Each has a long history of agriculture, due in part to their favourable weather conditions and soils. In terms of production volumes for fresh fruit and vegetables, Romania leads ahead of Hungary.

For fresh produce, all four had a negative trade balance in 2022. Imports play a significant role in these south-eastern countries, although roughly two-thirds of the produce on Hungarian shelves is local. Soaring inflation and increasing prices had a limiting effect on consumption last year. Respective governments adopted different approaches to control the situation, and some countries even managed to push up food retail sales. However, with less disposable income, many consumers now select foods based on value. Local produce may fit into this gap.

All four countries import a significant volume of fresh fruit and vegetables. And again, Romania imports the most in both categories. Bananas are the most commonly imported fruit in all four countries, followed by apples in Romania. The most commonly imported vegetables are tomatoes and peppers in Bulgaria and Croatia, cucumbers in Hungary, and tomatoes and onions in Romania. Greece and Turkey are the main suppliers of fresh fruit and vegetables to the four countries, followed by Germany, which mostly re-exports these products. In terms of exports, the quartet also ships a significant volume of fresh fruit and vegetables to other nations; and Hungary exports the most in both categories.

Exports of fresh fruit and vegetables are small in volume. Hungary is the leading exporter, but exports of processed products are more significant. Germany is the main destination for fresh products, followed by neighbouring countries, with some trade also occurring between these four countries.

Fruit and vegetable production in Bulgaria, Croatia, Hungary and Romania was affected by droughts throughout the south-eastern EU in 2022, particularly in Hungary. This was especially true for produce that could not be irrigated. Governments in each country opted into a programme to support farmers and reduce their dependency on the weather. However, even with advanced irrigation methods and structural changes, the water deficit will be a significant issue in the coming years. Wages and production costs also rose dramatically in 2022, so a decrease in production is likely.

Since most production areas did not change significantly, a certain decline in produce volume is expected. In this regard, non-irrigated orchards and extensively grown crops will have a greater effect on results. While production is forecast at a similar level to the previous year, it is safe to assume that the final numbers for 2022 will show some changes.

PRODUCTION

VOLUME ('000 tonnes)

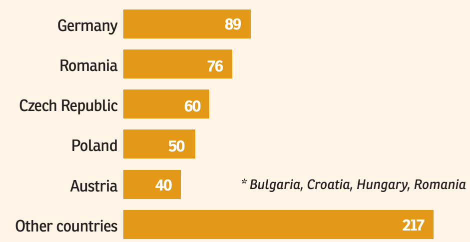
FRESH FRUIT	2019	2020	2021	2022p
Bulgaria	**373**	**334**	**380**	**386**
– Plums	56	60	65	65
– Cherries	60	57	56	56
Croatia	**171**	**152**	**159**	**151**
– Apples	68	63	55	65
– Easy peelers	52	39	42	42
Hungary	**930**	**725**	**888**	**727**
– Apples	452	350	520	350
– Sour cherries	63	62	61	61
Romania	**1,834**	**1,776**	**1,923**	**1,887**
– Plums	692	757	807	807
– Apples	327	384	444	410
– Watermelons	463	259	300	300

FRESH VEGETABLES	2019	2020	2021	2022p
Bulgaria	**313**	**256**	**262**	**249**
– Tomatoes	115	89	94	92
– Peppers	64	51	62	62
Croatia	**141**	**182**	**145**	**140**
– Cabbage	36	41	35	38
– Tomatoes	22	33	19	19
Hungary	**1,303**	**1,264**	**1,260**	**1,190**
– Sweetcorn [1]	483	511	472	434
– Peppers	83	79	96	71
– Tomatoes [2]	159	154	172	156
Romania	**1,865**	**1,957**	**1,941**	**1,748**
– Cabbage	616	541	548	548
– Tomatoes	437	494	500	474
– Onions	204	230	219	220

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

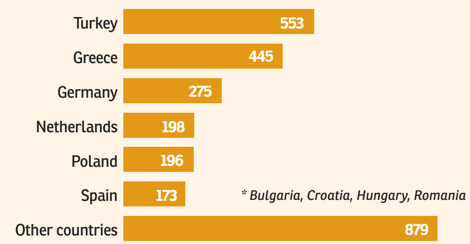
FRUIT AND VEGETABLE EXPORTS 2021

BY SOUTHEAST COUNTRIES* ('000 TONNES)



FRUIT AND VEGETABLE IMPORTS 2021

BY SOUTHEAST COUNTRIES* ('000 TONNES)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bulgaria	**350**	**349**	**374**	**371**
– Bananas	69	71	73	63
Croatia	**213**	**207**	**242**	**232**
– Bananas	79	78	78	80
Hungary	**280**	**287**	**291**	**262**
– Bananas	71	80	78	69
Romania	**808**	**819**	**830**	**792**
– Bananas	211	222	232	216
– Apples	99	95	90	87

FRESH VEGETABLES	2019	2020	2021	2022p
Bulgaria	**230**	**228**	**259**	**238**
– Tomatoes	84	86	100	138
– Peppers	26	26	33	42
Croatia	**117**	**106**	**124**	**200**
– Peppers	17	18	17	27
Hungary	**139**	**161**	**186**	**170**
– Cucumbers	18	26	31	38
Romania	**365**	**359**	**393**	**383**
– Tomatoes	80	89	90	86
– Onions	80	57	63	67

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bulgaria	**42**	**46**	**53**	**79**
– Lemons	10	10	14	15
Croatia	**79**	**71**	**88**	**91**
– Easy peelers	22	24	24	24
Hungary	**137**	**114**	**124**	**113**
– Watermelons	40	32	33	24
Romania	**14**	**26**	**33**	**42**

FRESH VEGETABLES	2019	2020	2021	2022p
Bulgaria	**42**	**46**	**53**	**39**
Croatia	**18**	**24**	**27**	**28**
Hungary	**79**	**85**	**97**	**91**
– Peppers	21	19	22	19
Romania	**30**	**48**	**53**	**68**
– Cucumbers	13	18	26	19

TRADE BALANCE

FRESH FRUITS AND VEGETABLES, VALUE (million euros)

BULGARIA	2019	2020	2021	2022p
Import	262	284	343	356
Export	108	104	139	152
TRADE BALANCE	-155	-180	-204	-204

ROMANIA	2019	2020	2021	2022p
Import	912	944	1,019	1,073
Export	70	94	111	133
TRADE BALANCE	-842	-850	-908	-940

Population
6.9 m

Area
88,400 km²

GDP per Inhabitant
7,800 EUR

GDP Growth
7.5 per cent

Unemployment
6.7 per cent

CPI for Food
(2015=100)
115.2

SOUTHEAST EUROPE

SERBIA

Last year was not an easy one for Serbia's fruit and vegetable sector. Producers faced rising costs for production inputs as well as energy. In addition, consumer price inflation and depressed consumer demand as a result of the Ukrainian war meant they also felt pressure on international markets.

Much of the country's fruit is produced for export, but vegetables are sold mainly on the domestic market. Due to heat and drought in 2022, vegetable crop yields were down compared with 2021, a trend which was reflected in the overall production figure. As a result, Serbia was more dependent on imports, for example for cabbage.

The total fresh fruit harvest, meanwhile, increased to 1.6m tonnes, thanks to a larger stonefruit crop. In recent years, the number of intensive plantations has increased. Not only did the producers invest in modern technology, but the planting density was higher, which led to higher yields per hectare. The area under fruit production was stable, remaining around the 188,900ha recorded in 2021. The biggest fruit crops were plums (38 per cent of the total land used to grow fruit), apples (14 per cent), raspberries (11 per cent) and cherries (10 per cent). Plums are Serbia's second most-important fruit crop in terms of volume, but every year about 70 per cent of the harvest is distilled into alcohol for plum brandy (Šljivovic).

As was the case elsewhere in Europe, Serbia felt the effects of the war in Ukraine. Unlike other countries in Europe, it is not subject to the trade embargo that Moscow imposed in 2014. When the invasion began last February, truckloads of apples were held up at the Russian border, but this was a short-term problem. Russia remains Serbia's most important export market. In 2021, 55 per cent of its fresh fruit went there. In total, it exported about 245,000 tonnes of fresh fruit and another 180,000 tonnes of frozen fruit in 2022.

Serbia is known as one of the world's largest exporters of frozen raspberries. In 2022, the market situation changed for this product and its exports fell by 30 per cent. First, Serbia was confronted with declining consumption in Germany and France – its most important sales markets – with a similar trend in terms of industrial demand. In addition, exports to the US were limited due to a good harvest in Chile. In recent years, serious competition has also emerged in the Balkan region, for example in Ukraine, Kosovo and Bosnia. With prices higher compared with 2021, however, the value of Serbia's exports did rise.

PRODUCTION

VOLUME ('000 tonnes)

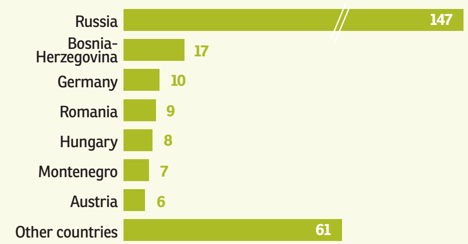
FRESH FRUIT	2019	2020	2021	2022p
Apples	500	489	513	502
Plums	559	583	413	473
Sour cherries	97	166	155	164
Melons	163	141	145	145
Raspberries	120	119	111	115
Pears	55	67	56	58
Peaches	48	41	31	30
Blackberries	32	29	31	30
Apricots	41	30	31	30
Other	122	130	112	120
TOTAL	1,737	1,795	1,598	1,667

FRESH VEGETABLES	2019	2020	2021	2022p
Brassicas	178	179	185	180
Peppers	118	107	148	140
Tomatoes	112	103	135	135
Carrots	40	53	55	50
Leguminous crops	35	37	33	35
Cucumbers	30	31	29	30
Onions	30	33	37	30
Other	32	36	29	30
TOTAL	575	579	651	630

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

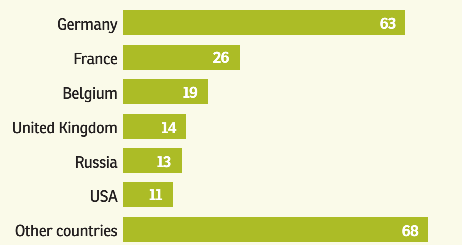
FRESH FRUIT EXPORTS 2021

BY DESTINATION ('000 tonnes)



FROZEN FRUIT EXPORTS 2021

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	78	96	94	80
Oranges	41	45	44	40
Easy peelers	29	33	35	30
Apples	33	27	21	30
Other	79	102	103	105
TOTAL	260	303	297	285

FRESH VEGETABLES	2019	2020	2021	2022p
Tomatoes	32	33	36	30
Brassicas	9	9	14	15
Peppers	7	10	13	10
Other	42	35	39	40
TOTAL	89	87	102	95

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	217	173	180	160
Plums	20	28	24	25
Peaches, Nectarines	22	24	18	15
Cherries	18	18	12	15
Strawberries	9	9	8	5
Other	30	23	23	25
TOTAL	316	275	265	245

FRESH VEGETABLES	2019	2020	2021	2022p
Onions	22	17	15	20
Cucumbers/Gherkins	20	21	28	20
Peppers	14	14	10	10
Tomatoes	9	5	7	10
Brassicas	5	4	2	5
Other	31	29	24	30
TOTAL	101	90	86	95

FROZEN PRODUCTS	2019	2020	2021	2022p
Raspberries	114	108	98	70
Sour cherries	30	27	31	30
Blackberries	34	38	32	25
Other fruit	46	55	53	55
Vegetables	63	48	48	50

TRADE BALANCE

VALUE (million euros)

FRESH FRUITS	2019	2020	2021	2022p
Import	177	224	233	270
Export	210	237	249	240
TRADE BALANCE	+33	+13	+16	-30

FRESH VEGETABLES	2019	2020	2021	2022p
Import	70	77	96	115
Export	53	49	52	60
TRADE BALANCE	-17	-28	-44	-55

Population 67.5 m

Area 243,600 km²

GDP per Inhabitant 40,020 EUR

GDP Growth 7.4 per cent

Unemployment 4.5 per cent

CPI for Food (2015=100) 111.6

UNITED KINGDOM

At the end of 2021, the reduced availability of seasonal labour due to Brexit – and an expected reduction in production as a result – was a much-discussed topic in the UK. To some extent, this turned out to be a fair prediction. At the end of 2022, the British government granted access to more foreign seasonal workers. The new allocation allows businesses to bring foreign workers to the country for up to six months through the Seasonal Worker visa scheme, and this could provide as many as 15,000 more people than were available at the start of last year.

Ultimately, however, UK production of fruit and vegetables was again heavily influenced by weather conditions. Plentiful sunshine in April meant the strawberry harvest started earlier than in 2021. The subsequent heatwave led to a forced harvest and a temporarily large supply not only of strawberries, but also of cherries. For vegetables, the effects were different. Heat and drought prevailed over large parts of the country during the summer and meant yields were limited, especially in non-irrigated fields. This was particularly true for onions, which had little chance to benefit from the late rains due to an early harvest in September. A combination of reduced areas and lower yields led to a drop in production of 100,000 tonnes. The situation was quite different in autumn, when mild weather all the way into November encouraged early production of many winter vegetables, such as cabbage, cauliflower and broccoli. This led to a glut and a large amount of waste, as well as fears of shortages in early 2023.

In terms of external trade, Brexit has made non-European suppliers more competitive. As of January 2021, fruit and vegetables from the EU to the UK must be accompanied by a customs declaration and a certificate of conformity with marketing standards. Since July 2022, EU fresh fruit and vegetables shipments must also be accompanied by a phytosanitary certificate. With these requirements, EU countries have no specific advantage over other supplying countries. So suppliers from nearby countries such as Morocco have a new advantage. This is particularly evident in the vegetable assortment for tomatoes, and in the fruit assortment for many berries. While most of the imported fruit comes to the UK from non-EU countries anyway, the bloc's share of imported vegetables remains high. For peppers, cucumbers and lettuces, that figure remained between 95 and 99 per cent in the first nine months of last year.

There is no room for a detailed analysis of costs and prices, because these vary from product to product and depend on many factors. As a result of the pandemic, Brexit and the war in Ukraine, the costs of inputs and logistics have risen. This has led to price increases, but it does not automatically mean that growers and exporters are getting more money for their products.

PRODUCTION

VOLUME ('000 tonnes)

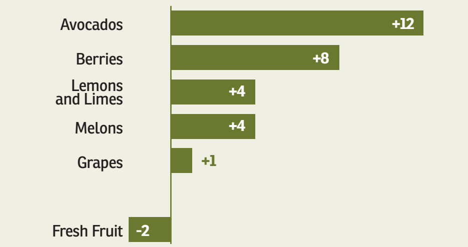
FRESH FRUIT [1]	2019	2020	2021	2022p
Apples	209	201	189	245
Strawberries	144	123	115	130
Pears	27	25	19	20
Raspberries	17	15	16	17
Blackcurrants	14	16	13	14
Plums	7	8	4	7
Cherries	6	6	4	6
Other soft fruit	11	12	11	12
Other	3	5	1	2
TOTAL	438	411	372	453

FRESH VEGETABLES [2]	2019	2020	2021	2022p
Carrots	821	784	797	760
Onions	454	451	458	350
Peas [3]	161	171	176	172
Cabbage	155	167	151	158
Lettuce	112	109	103	103
Cauliflower	90	101	93	95
Mushrooms	101	93	86	88
Turnips/Swedes	84	95	92	84
Broccoli	64	84	78	80
Parsnips	80	72	74	72
Other	499	527	521	518
TOTAL	2,621	2,654	2,629	2,480

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

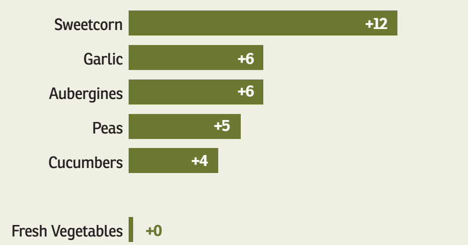
TOP 5 FRESH FRUIT IMPORTS

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



TOP 5 FRESH VEGETABLE IMPORTS

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



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Bananas	1,080	1,035	948	910
Apples	338	340	327	325
Melons	323	316	282	315
Easy peelers	292	316	286	292
Table grapes	283	277	269	278
Oranges	266	267	246	258
Lemons/Limes	162	168	147	151
Pineapples	161	135	120	115
Pears	115	107	100	110
Other	637	603	602	576
TOTAL	3,657	3,564	3,327	3,330

FRESH VEGETABLES [1]	2019	2020	2021	2022p
Tomatoes	409	383	335	370
Onions	477	307	296	290
Lettuce	217	231	202	210
Peppers	205	221	191	205
Cucumbers	189	195	169	190
Mushrooms	132	116	106	99
Cauliflower/Broccoli	136	129	103	91
Sweetcorn	53	54	58	58
Other	538	577	518	530
TOTAL	2,356	2,213	1,978	2,043

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2019	2020	2021	2022p
Apples	19	21	11	11
Melons	11	13	3	2
Avocados	14	21	7	1
Other	118	123	16	14
TOTAL	162	178	37	28

FRESH VEGETABLES	2019	2020	2021	2022p
Carrots/Turnips	31	15	8	13
Mushrooms	5	12	9	12
Cauliflower/Broccoli	8	11	6	8
Other	99	70	46	52
TOTAL	143	108	69	85

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2019	2020	2021	2022p
Import	4,610	4,593	4,341	4,688
Export	184	216	73	50
TRADE BALANCE	-4,426	-4,377	-4,268	-4,638

FRESH VEGETABLES	2019	2020	2021	2022p
Import	3,045	2,968	2,756	3,080
Export	152	131	85	98
TRADE BALANCE	-2,893	-2,837	-2,671	-2,982

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