FRUIT LOGISTICA 2019

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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:
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EUROPEAN STATISTICS HANDBOOK

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Weather trends and winds of change

While it is certainly true that in the European fruit and vegetable market no year is the same, the past two years have been unusually distinctive. Following a small apple and pear harvest in 2017/18, which left more room for imports from the Southern Hemisphere during the first half of 2018, a super-harvest was expected for 2018/19. This did not transpire, however, because yields were ultimately limited by an unforeseen heatwave in central Europe.

In the meantime, a seemingly never-ending summer in northern and central Europe boosted demand for watermelons, but demand for classic fruits such as apples and bananas declined. Vegetable production, meanwhile, suffered particularly from the lack of rain.

Mega-trends in consumer behaviour, such as convenience and ethical purchasing, look set to continue to be important; and the discussion about sustainable packaging for fresh fruit and vegetables will surely become even more influential. However, price still matters. For that reason, we have dedicated an extra chapter here to the role of discounters in Europe.

Wherever you work in the fresh produce industry, the European Statistics Handbook provides valuable information that can help you make decisions in the most important European markets.

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FRUITNET

Population
512.6 m

Area
4,381,300 km²

GDP per Inhabitant
30,000 EUR

GDP Growth
2.4 per cent

Unemployment
4.9 per cent

CPI for Food
(2015=100)
102.0

EUROPEAN UNION

Europe's climate is hugely varied, which means it can produce a wide range of products on a large scale, with the notable exception of tropical fruits. The continent's largest vegetable producers are Spain and Italy, which together make up about 42 per cent of total European production, followed by Poland, the Netherlands and France. The majority of Poland's production goes for processing. Tomatoes are the most important product in terms of production volume, followed by onions and carrots. Tomatoes account for around 31 per cent of European vegetable production, although most of this volume is used for processing.

Spain and Italy are also the leading fruit-producing nations, followed by Poland, France and Greece. Apples are almost as dominant as tomatoes are for vegetables. However, their share of total fruit production is only 27 per cent and processing is comparatively less prominent. Other major fruits include oranges and easy peelers. Strawberries and other berries are being produced to an increasing extent, although despite being high in value their volumes are not big enough for a place among the top eight fruits.

Despite its strong production potential, the EU also depends on imports of fruit and vegetables. Its trade balance is negative for both, although the deficit for fruit is much larger – this is because bananas and other tropical fruits are only produced in minor quantities in the EU.

The vegetable trade is concentrated on product flows between the EU countries. Only around 13 per cent of vegetable imports come from third countries. The most important source of vegetables outside the EU is Morocco, followed by Israel and Egypt. Within the EU, Spain and the Netherlands are the main sources. Germany, France and the UK are the main importers. Only 13 per cent of EU production is exported to third countries. The share of third-country exports is high for onions: Russia has long been the most important export destination outside the EU, but this changed after the import ban in August 2014. Belarus, Senegal and Brazil were the most important third-country destinations recently, with mainly onions exported to the latter two.

Fruit tends also to be traded mostly within the EU itself. However, the share of imports from third countries is significantly higher than it is for vegetables. In fact, around 40 per cent of fruit imports come from countries outside the EU – the main sources being Costa Rica, Colombia, Ecuador and South Africa. Within the EU, Spain, the Netherlands and Italy are the most important origins. Bananas lead in terms of import volume, followed by oranges and apples. Exports to countries outside the EU account for about 16 per cent of total export volumes. The main destinations for fruit from the EU are Germany, France and the UK. The most important third country is Belarus.

PRODUCTION

VOLUME ('000 tonnes)

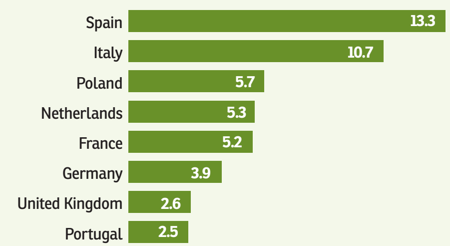
FRESH FRUIT	2015	2016	2017	2018p
Apples	12,326	11,840	9,251	12,556
Oranges	6,192	6,364	6,208	6,400
Easy Peelers	3,060	3,262	2,925	3,220
Watermelons	2,915	3,047	3,219	3,190
Peaches	2,266	2,198	2,907	2,645
Pears	2,394	2,173	2,239	2,327
Melons	1,833	1,793	1,791	1,840
Table Grapes	1,709	1,733	1,640	1,660
Nectarins	1,488	1,368	1,457	1,369
Other	10,340	11,055	11,575	11,693
TOTAL	44,523	44,833	43,212	46,900

FRESH VEGETABLES [1]	2015	2016	2017	2018p
Tomatoes [2]	17,725	17,987	17,427	17,400
Onions	6,144	6,587	6,737	5,160
Carrots	5,083	5,588	5,772	5,140
Head Cabbage	3,632	3,800	3,738	3,360
Cucumbers	2,697	2,643	2,725	2,860
Peppers	2,516	2,500	2,637	2,580
Cauliflower	2,296	2,330	2,436	2,310
Headed Lettuce	2,454	2,291	2,364	2,220
Courgettes	1,448	1,539	1,546	1,500
Other	14,046	14,460	14,435	12,990
TOTAL	58,041	59,725	59,817	55,520

1) Excluding potatoes. 2) Including tomatoes for processing.
Sources: AMI-informiert.de; Eurostat

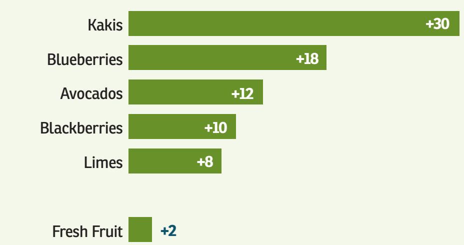
TOP 8 VEGETABLE PRODUCERS 2017

(million tonnes)



TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2008-2017)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	8,133	8,529	9,179	9,249
Oranges	3,151	3,192	3,236	3,126
Apples, fresh market	2,906	2,554	2,792	2,491
Easy Peelers	2,112	2,207	2,033	2,084
Watermelons	1,388	1,548	1,633	1,748
Table Grapes	1,554	1,579	1,654	1,637
Pineapples	1,231	1,314	1,408	1,562
Lemons	1,088	1,179	1,228	1,283
Pears	1,109	1,134	1,089	1,016
Other	7,407	7,774	8,399	8,144
TOTAL	30,079	31,010	32,651	32,340

FRESH VEGETABLES [1]	2015	2016	2017	2018p
Tomatoes	3,183	3,098	3,043	3,048
Onions	1,419	1,568	1,477	1,532
Peppers	1,352	1,369	1,391	1,451
Lettuce	1,305	1,328	1,326	1,324
Cucumbers	1,306	1,322	1,332	1,299
Carrots	1,095	1,148	1,102	1,135
Cauliflower	531	524	568	556
Courgettes	389	457	446	452
Mushrooms	435	427	426	416
Other	3,330	3,566	3,630	3,571
TOTAL	14,345	14,807	14,741	14,784

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	2,815	2,919	3,249	3,143
Oranges	2,861	2,753	2,666	2,639
Apples	4,142	3,700	3,490	2,470
Easy Peelers	2,086	2,074	1,879	1,867
Other	10,873	11,223	11,710	11,156
TOTAL	22,777	22,669	22,994	21,275

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	3,024	2,938	2,768	2,690
Onions	2,124	2,326	2,274	2,308
Lettuce	1,420	1,454	1,461	1,523
Peppers	1,309	1,328	1,356	1,410
Other	6,888	7,231	7,278	7,347
TOTAL	14,765	15,277	15,137	15,278

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	28,955	31,379	33,483	34,656
Export	21,066	22,419	23,478	23,550
TRADE BALANCE	-7,889	-8,960	-10,005	-11,106

FRESH VEGETABLES	2015	2016	2017	2018p
Import	15,738	16,524	17,303	16,538
Export	14,555	15,646	15,969	15,489
TRADE BALANCE	-1,183	-878	-1,334	-1,049

Population
11.4 m

Area
30,500 km²

GDP per Inhabitant
38,700 EUR

GDP Growth
1.7 per cent

Unemployment
4.2 per cent

CPI for Food
(2015=100)
104.0

BELGIUM

Although Belgium is only a small country in Europe in terms of area, it is an important hub for European imports and exports, thanks to the seaports in Antwerp and Bruges-Zeebrugge. It's not simply Belgian pears that are shipped via the country; kiwifruit from New Zealand also arrive in Zeebrugge, while many exotic fruits enter exclusively through Belgium on their journey to destinations within Europe. Other arrivals, such as citrus or stonefruit, are destined for domestic consumption.

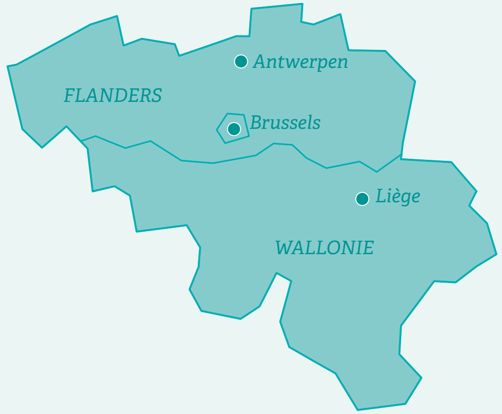
The mainstays of Belgian fruit production are apples and pears. Cultivation of the latter has been extended at the expense of the former in recent years. Currently, pears are grown on 10,000ha and apples on approximately 6,000ha. Much of the fruit is produced in Flanders, in the region around Sint-Truiden (Limburg province), while most of the vegetables are grown in Flanders. Important growing regions can be found in Sint-Katelijne-Waver, Roeselare and Hoogstraaten. Tomatoes, leeks, carrots, salads and chicory are important crops produced in Belgium.

While apple production is dominated by the varieties Jonagold and Jonagored, the main pear variety is Conference. Once exotic fruits are excluded, pears lead the Belgian fruit export trade. Because of the Russian embargo, new markets outside Europe have been opened: Conference pears are now exported to China, India, Brazil and Vietnam, for example. A large part of Belgium's fruit and vegetable production is marketed through auctions known as Veilingen.

According to the Association of Belgian Horticultural Cooperatives (VBT), its members' turnover amounted to €944.1m in 2017 – with vegetables accounting for 63 per cent and fruit 37 per cent. Based on sales volume, tomatoes led the way ahead of pears and cucumbers. In terms of value, tomatoes, strawberries and pears were the top performers in recent years.

Belgium is also the largest producer of frozen vegetables in Europe. In 2017, production once again rose to one million tonnes, accounting for a good quarter of total European production. Production is centred around south and west Flanders, and around 90 per cent of production is exported. Important destinations are neighbouring countries like France, Germany and the Netherlands; and recently 87 per cent of exports have ended up in EU markets. For third countries, the US and Australia received the largest quantities.

In recent years, Belgium has imported about twice as much fruit as vegetables. In both cases, it is a net importer. It also imports typical vegetable crops like peas, beans and cauliflower from neighbouring countries for processing.



PRODUCTION

VOLUME ('000 tonnes)

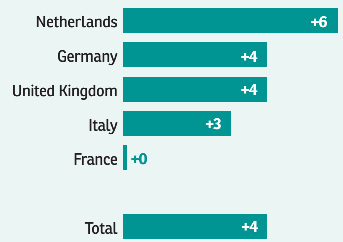
FRESH FRUIT	2015	2016	2017	2018p
Pears	369	322	302	318
Apples	285	234	86	217
Strawberries	48	45	48	43
Other	11	10	8	9
TOTAL	713	611	444	587

FRESH VEGETABLES [1]	2015	2016	2017	2018p
Tomatoes	253	260	256	258
Leeks	130	96	114	120
Carrots	63	93	93	82
Lettuce	43	41	41	40
Chicory Witlof	40	39	37	36
Peppers	25	27	28	29
Cucumbers	17	24	26	25
Courgettes	13	15	15	15
Celery	15	14	2	10
Other [2]	1,029	1,113	1,165	1,100
TOTAL	1,628	1,722	1,777	1,715

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

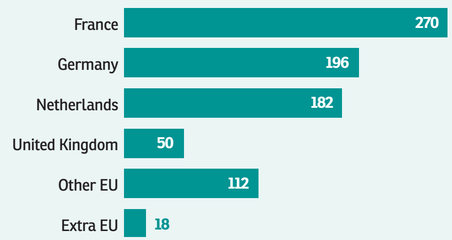
TOP 5 FROZEN VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2008-2017)



FRESH VEGETABLE EXPORTS 2017

BY DESTINATION (million euros)



Sources: AMI-informiert.de; Eurostat; VLAM

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Exotics	1,620	1,705	1,816	1,720
Citrus	251	267	254	250
Apples	151	131	152	140
Peaches	67	65	66	63
Other	228	249	257	260
TOTAL	2,317	2,417	2,545	2,433

FRESH VEGETABLES	2015	2016	2017	2018p
Carrots/Turnips	256	282	267	290
Onions/Shallots	138	141	140	145
Green Beans	69	79	131	140
Peas	115	112	123	125
Tomatoes	93	88	88	90
Cucumbers	83	97	90	85
Cauliflower	30	32	37	35
Other	309	356	363	355
TOTAL	1,093	1,187	1,239	1,265

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Exotics	1,467	1,452	1,592	1,600
Pears	307	326	311	320
Apples	233	211	163	200
Strawberries	53	41	48	45
Other	126	123	135	128
TOTAL	2,186	2,153	2,249	2,293

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	232	220	219	225
Carrots/Turnips	138	139	192	140
Leeks	74	69	67	70
Cucumbers	62	68	65	65
Onions/Shallots	49	56	60	55
Peppers	42	40	44	42
Celery	31	34	29	30
Chicory	18	19	20	20
Other	202	200	242	220
TOTAL	848	845	938	867

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	2,324	2,521	2,713	2,800
Export	1,988	2,007	2,159	2,200
TRADE BALANCE	-336	-514	-554	-600

FRESH VEGETABLES	2015	2016	2017	2018p
Import	827	911	895	880
Export	802	821	828	830
TRADE BALANCE	-25	-90	-67	-50

Population 67.2 m

Area 633,200 km²

GDP per Inhabitant 34,200 EUR

GDP Growth 2.2 per cent

Unemployment 5.7 per cent

CPI for Food (2015=100) 101.5

FRANCE

Like Europe itself, France's size and varied climate enable it to produce a wide range of fruit and vegetables, with the addition of bananas and other exotic fruits from its overseas departments. But France imports a huge amount of fruits and vegetable as well, resulting in a negative trade balance. This deficit has in fact increased from year to year, with imports of both fruit and vegetables growing faster than exports. Exports of some products have been declining for years. The reason for this is that France is selling more on its domestic market.

The long-term development of French fruit production shows a negative trend. Pear production in particular has decreased considerably since 2006, while production of apples and apricots was more or less stable during that time. A decrease in fruit production during 2018 was mainly due to a smaller stone fruit harvest. The drought this summer also had a negative impact on the apple harvest.

Although the apple crop was larger than in the previous year, it was still below average. Due to the cold and wet weather in February and March 2018, the harvest of stone fruit was smaller than normal. France is an important producer of apricots in Europe. The trade balance for apricots has been positive for many years. In 2017, exports reached 56,000 tonnes, whereas imports were just 20,800 tonnes. France is an important producer of prunes and plans to expand its production in the near future. Due to the negative weather impacts the plum crop 2018 was one of the smallest in the last years.

French vegetable production is dominated by tomatoes, carrots and onions. These are mainly sold fresh, although an important part of the country's vegetable production is sold for processing – including at least 90 per cent of all peas, green beans and sweetcorn. Cauliflower is an important vegetable for France's domestic market and its exports, but during production peaks a large quantity ends up being processed – an important means of stabilising the fresh market.

A long-term view suggests French vegetable production is decreasing and imports are increasing. Tomatoes are the most important veg export, but also the largest import. Carrots are second, even though France harvests carrots nearly all through the year (with a small gap from April to mid-May). Cauliflower and chicory are traditional French export items, helping it to defend its positive trade balance.

French consumers mainly buy their fresh fruit and vegetables in big supermarkets (hypermarché). However, their share of the market (about one-third) has not grown in recent years, while discounters have cornered only a little more than 10 per cent. It is interesting to note the success of the so-called 'green multiples' format in France: these 'grand surface frais' stores only sell fresh produce and have stopped the sales decline among greengrocers.

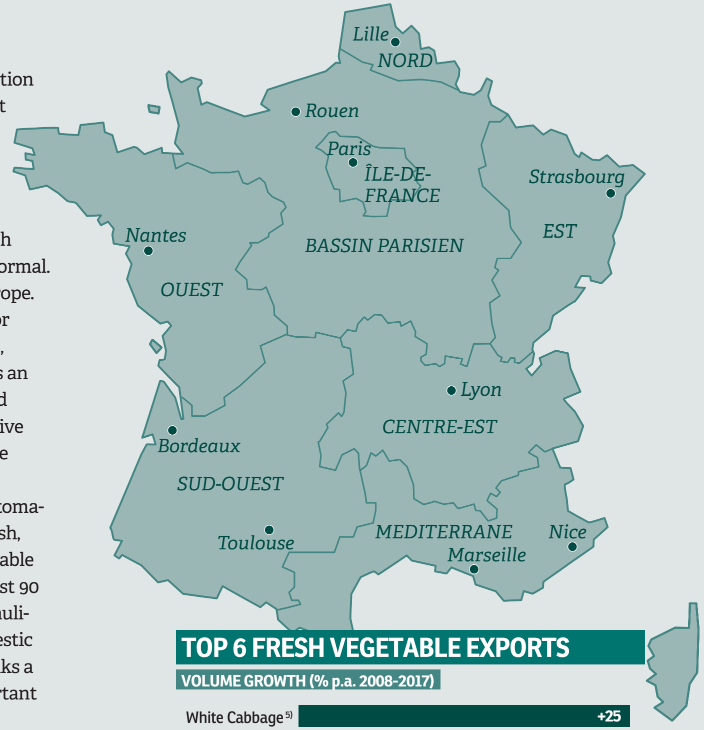
PRODUCTION

VOLUME ('000 tonnes)

FRESH FRUIT [1]	2015	2016	2017	2018p
Apples	1,674	1,515	1,424	1,477
Bananas	283	291	184	250
Melons	278	252	280	245
Plums [2]	165	216	211	170
Apricots	157	116	157	134
Pears	155	138	133	134
Peaches	120	113	122	108
Nectarines	97	94	100	92
Kiwifruit	67	65	58	60
Easy Peeler	29	40	42	40
Other	488	514	519	510
TOTAL	3,513	3,354	3,229	3,220

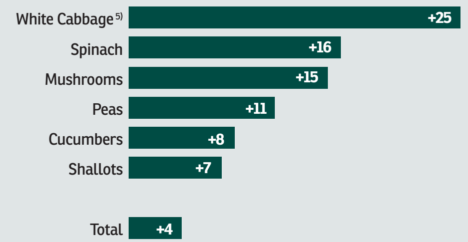
FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	786	823	772	726
Carrots	560	581	564	500
Sweetcorn	373	351	415	355
Green Beans	305	310	397	300
Onions	345	318	326	280
Cauliflower	290	289	290	241
Lettuce	231	228	219	200
Peas	235	228	250	190
Chicory	180	172	153	150
Leeks	160	151	160	150
Other	1,635	1,671	1,641	1,650
TOTAL	5,100	5,112	5,187	4,742

1) Including overseas departments. 2) Including greengages and mirabelles. 3) Including nectarines and clingstones. 4) Including broccoli. 5) Including red cabbage.



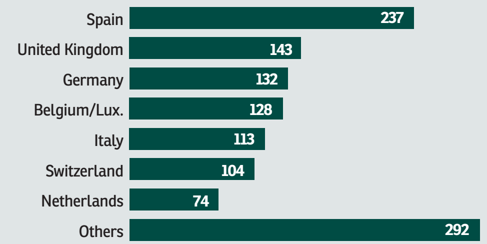
TOP 6 FRESH VEGETABLE EXPORTS

VOLUME GROWTH (% p.a. 2008-2017)



FRESH FRUIT EXPORTS 2017

BY DESTINATION ('000 tonnes)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	599	572	690	771
Oranges	492	512	517	495
Clementines	352	371	355	351
Watermelons	150	168	188	200
Melons	175	174	180	161
Peaches [3]	166	172	174	156
Avocados	117	135	146	155
Others	1,100	1,153	1,166	1,118
TOTAL	3,151	3,256	3,416	3,408

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	544	541	507	503
Sweet peppers	143	152	149	154
Carrots	145	153	155	150
Onions	130	143	136	140
Courgettes	129	151	138	139
Cucumbers	75	78	77	73
Others	711	728	708	715
TOTAL	1,877	1,945	1,869	1,875

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [5]	2015	2016	2017	2018p
Apples	610	565	524	438
Bananas	287	255	251	243
Oranges	47	46	46	39
Melons	48	44	43	38
Watermelons	19	20	27	34
Others	341	299	332	230
TOTAL	1,352	1,228	1,224	1,023

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	243	248	231	208
Beans	82	108	111	129
Cauliflower [4]	143	96	146	95
Onions	92	99	80	79
Peas	63	60	72	62
Carrots	111	119	87	61
Other	334	326	324	270
TOTAL	1,069	1,054	1,050	903

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	3,179	3,511	3,732	3,795
Export	1,369	1,325	1,348	1,192
TRADE BALANCE	-1,810	-2,186	-2,384	-2,603

FRESH VEGETABLES	2015	2016	2017	2018p
Import	2,010	2,121	2,188	1,981
Export	1,027	1,065	1,070	886
TRADE BALANCE	-983	-1,056	-1,118	-1,095

Population 82.8 m

Area 357,300 km²

GDP per Inhabitant 39,600 EUR

GDP Growth 2.2 per cent

Unemployment 2.6 per cent

CPI for Food (2015=100) 102.1

GERMANY

Production of fruit and vegetables in Germany is limited to a certain extent by climate. Although some new greenhouses have been built in recent years, the country continues to rely heavily on imported produce. Where vegetables are grown, they tend to be the classic field products such as carrots, onions or cabbage, plus of course asparagus (mainly white) remains a special feature of Germany's vegetable industry, with almost a quarter of total outdoor vegetable production area dedicated to the crop. Despite a short season of only around three months, and relatively low yields, asparagus makes up a good 3 per cent of the country's vegetable output. In total, around 3.5m tonnes of vegetables are harvested outdoors in Germany, equal to just under 6 per cent of European production. For asparagus, however, the country's share is 40 per cent, making it by far the most important producer in Europe and among the leaders worldwide. Germany does still import a significant amount of fresh asparagus, but the marketing window has become smaller and smaller in recent years.

Fruit production in Germany amounts to around 1.3m tonnes in a normal year. However, 2017 was an exceptional year. Massive frosts in April hit the fruit blossom at a delicate stage and nearly halved the apple harvest, which makes up about 75 per cent of the country's entire fruit output. The dry and warm weather in 2018 led to a much larger fruit harvest. In volume terms, strawberries are Germany's second most-important fruit – in recent years, open-field cultivation has been reduced and protected production increased to safeguard supply – with plums, pears and cherries following in terms of importance. Germany's berry production is growing, but recent growth in the category has been driven mainly by imports. Only blueberry production shows a clear upward trend.

Germany relies heavily on fresh fruit and vegetable imports. All exotic fruits, citrus, melons and grapes, as well as large volumes of stonefruit, have to be imported. Vegetable imports consist predominantly of vegetables like tomatoes, peppers and aubergines, but outside the German growing season a large range of salads and other outdoor vegetables are imported. Germany is about 38 per cent self-sufficient on vegetables, but only about 15 per cent on fruit. Fruit imports were at a record high in 2017, but a slight was expected for 2018. Vegetable imports reached their record level in 2016 and decreased slightly in the last two years. Some products are also exported, but the trade balance is definitely negative in both cases.

More than half of all fresh fruit and vegetables are bought in discount stores in Germany. Traditional outlets such as greengrocers, street markets and producers account for only 10 per cent of the purchased volume. For some products like asparagus or strawberries, however, direct sales from producers are very important.

PRODUCTION

VOLUME ('000 tonnes)

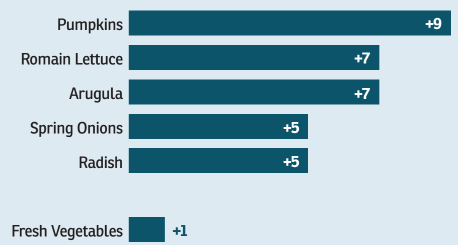
FRESH FRUIT [1]	2015	2016	2017	2018p
Apples	974	1,033	597	1,089
Strawberries	173	143	135	144
Plums	47	38	24	61
Pears	43	35	23	47
Sweet Cherries	31	29	17	41
Sour Cherries	17	16	8	19
Blueberries	12	11	14	16
Currants	14	14	12	15
Mirabelle Plums	5	4	3	6
Other	12	11	14	9
TOTAL	1,327	1,334	847	1,447

FRESH VEGETABLES [2] [3]	2015	2016	2017	2018p
Carrots	527	642	734	520
Onions	455	523	541	520
White Cabbage	404	431	479	360
Gerkins	190	207	192	190
Asparagus	114	120	131	130
Iceberg Lettuce	130	121	136	122
Red Cabbage	107	119	146	90
Cauliflower	105	93	98	90
Spring Onions	98	94	92	90
Other	1,114	1,166	1,221	1,288
TOTAL	3,245	3,516	3,770	3,400

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

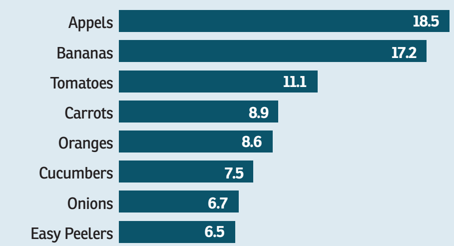
TOP 5 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2008-2017)



TOP 8 FRUIT AND VEGETABLES 2017

HOUSEHOLD PURCHASES (kg)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	1,399	1,403	1,418	1,257
Apples	549	520	629	582
Watermelons	368	401	412	498
Oranges	487	490	462	480
Easy Peelers	402	414	380	365
Table Grapes	338	330	338	304
Pears	168	169	170	165
Pineapples	144	170	148	163
Nectarines	187	172	183	148
Other	1,301	1,332	1,449	1,371
TOTAL	5,332	5,387	5,589	5,333

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	757	743	734	727
Cucumbers/Gherkins	520	467	483	473
Pepper	398	392	395	400
Lettuce	327	317	305	287
Carrots	265	254	240	231
Onions	235	248	227	222
Courgettes	79	89	89	97
Mushrooms	91	97	98	87
Cauliflower	74	65	80	77
Other	569	621	620	589
TOTAL	3,316	3,292	3,271	3,190

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	381	358	343	238
Apples	111	82	90	49
Oranges	36	32	28	31
Table Grapes	29	28	33	28
Other	223	215	200	211
TOTAL	781	715	694	557

FRESH VEGETABLES	2015	2016	2017	2018p
Onions	101	87	73	65
Lettuce	48	40	43	45
White Cabbage	75	39	43	44
Cucumbers/Gherkins	48	39	35	25
Other	223	223	235	221
TOTAL	494	427	429	400

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	5,303	5,695	6,045	6,277
Export	801	797	786	722
TRADE BALANCE	-4,502	-4,898	-5,259	-5,555

FRESH VEGETABLES	2015	2016	2017	2018p
Import	4,188	4,301	4,550	4,331
Export	394	364	374	361
TRADE BALANCE	-3,794	-3,937	-4,176	-3,970

Population
10.7 m

Area
132,000 km²

GDP per Inhabitant
16,700 EUR

GDP Growth
1.5 per cent

Unemployment
12.8 per cent

CPI for Food
(2015=100)
101.2

GREECE

Greece enjoys a special relationship with many countries in the surrounding region, partly because of the high direct investment of Greek companies in those neighbouring countries, and partly because of the region's importance as a market for Greek exports.

Fruit production is more important than vegetable production and Fruit production is also more export oriented. Greek vegetable production has declined over the last decade, although this was mostly due to a decrease in tomato production for processing. Most of the fruit vegetables, like tomatoes, cucumbers, courgettes and peppers, are grown under protection. Crete is Greece's leading region for greenhouse production, followed by the Peloponnese, Macedonia, Thessaly, Central Greece, Epirus and the Aegean Islands. A significant proportion of the greenhouse area used for vegetables is occupied by high tunnels. Other important open-field crops are onions and leafy vegetables.

Fruit production in Greece has remained stable or even increased slightly after 2007. Citrus is the most important sector, but there is more focus on oranges compared with other Mediterranean suppliers, with only limited production of lemons and easy peelers. Melons in Greece are mainly watermelons. They are produced and consumed in huge amounts; they are also the most important export item, in volume terms. The hot summer of 2018 in central Europe has promoted watermelon exports. Stonefruit is another important category, production of which is situated mainly in Macedonia. While clingstone peach production for processing is fluctuating a lot and decreasing, production of peaches and apricots for the fresh market is stable and nectarine production is rising. All of the country's stonefruit products, including cherries, are exported in major quantities. Although its main competitors in the Mediterranean region had a smaller stonefruit crop in 2018, Greece could not increase its exports. Cherries suffered most from heavy rainfall in June. Grapes are also a major export crop, where production has shifted to seedless varieties. Kiwifruit is the star among Greek fruit exports; in Autumn 2018 exports started only slowly, since Southern Hemisphere imports were still present in the European Markets.

Greek exporters have tried in recent years to diversify the destinations of their exports. The fruit exporters have been more successful than the vegetable exporters, with 23 per cent of all fruit exports destined for countries outside the EU. Egypt, Turkey, Jordan and Saudi Arabia have more than doubled their fruit imports from Greece since 2013, but in 2017 and 2018 this trend did not continue; instead, the EU's share of exports increased again. Exports of fresh vegetables are increasingly heading for countries like Bulgaria and Romania, with shipments to Germany down slightly. The latter's demand for imported white asparagus has fallen to such an extent that it has all but disappeared from German supermarket shelves, although Greek cucumbers have retained a stable market share in the south.

PRODUCTION

VOLUME ('000 tonnes)

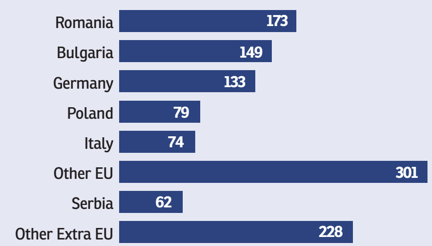
FRESH FRUIT	2015	2016	2017	2018p
Oranges	881	877	960	866
Watermelons	586	628	647	650
Table Grapes	253	315	310	320
Apples	242	259	231	286
Peaches [1]	162	175	203	244
Kiwifruit	199	180	220	220
Easy Peelers	167	176	174	175
Nectarines	82	87	97	116
Apricots	31	55	90	80
Other	259	299	256	243
TOTAL	2,862	3,051	3,188	3,200

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes [1]	578	564	540	540
Onions	233	207	207	210
Peppers	154	137	155	150
Cucumbers	115	107	107	110
Cabbage	123	88	79	80
Courgettes	75	76	77	75
Lettuce	70	69	64	65
Green Beans	60	67	60	65
Cauliflower, Broccoli	66	60	51	55
Other	361	403	388	350
TOTAL	1,835	1,778	1,729	1,700

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

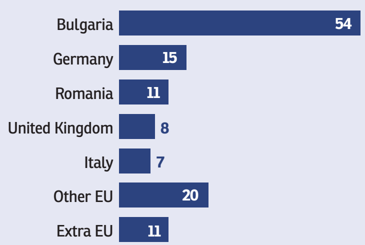
FRESH FRUIT EXPORTS 2017

BY DESTINATION ('000 tonnes)



FRESH VEGETABLE EXPORTS 2017

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	139	152	180	195
Lemons	21	17	24	20
Pineapples	7	8	10	12
Apples	20	20	13	10
Other	44	38	49	58
TOTAL	231	235	276	295

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes [1]	12	18	17	30
Onions	10	11	10	8
Mushrooms	7	7	8	8
Other	47	29	34	36
TOTAL	76	65	69	82

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Watermelons	170	178	173	183
Oranges	129	117	167	182
Kiwifruit	101	132	130	140
Peaches	84	100	116	95
Table Grapes	80	79	90	65
Apples	90	85	70	65
Nectarines	64	69	71	65
Strawberries	20	23	26	27
Apricots	10	16	25	24
Cherries	25	16	16	17
Pears	5	5	7	6
Other	337	397	307	371
TOTAL	1,115	1,217	1,198	1,240

FRESH VEGETABLES	2015	2016	2017	2018p
Cucumbers	35	40	34	40
Tomatoes	36	41	37	38
Peppers	19	21	19	19
Other	26	43	36	43
TOTAL	116	145	126	140

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	178	179	207	215
Export	677	759	738	780
TRADE BALANCE	499	580	531	565

FRESH VEGETABLES	2015	2016	2017	2018p
Import	66	62	68	75
Export	95	117	108	105
TRADE BALANCE	29	55	40	30

Population
60.5 m

Area
302,100 km²

GDP per Inhabitant
28,500 EUR

GDP Growth
1.6 per cent

Unemployment
6.4 per cent

CPI for Food
(2015=100)
101.3

ITALY

Italy, alongside Spain, is a hugely important producer and exporter of fresh fruit and vegetables in Europe. With a highly diverse climate stretching along the Italian Peninsula, the country has a wide product range: in addition to traditional fruits grown in temperate zones – apples and pears, for example – Italy is known as a key producer of stonefruit, citrus and exotics such as figs and kiwifruit. In several fruit and vegetable categories – pears, nectarines, apricots, kiwifruit, table grapes, tomatoes and aubergines – Italy is in fact Europe's largest producer. In recent years, the country produced up to 10m tonnes of fruit and around 7m tonnes of vegetables. One third of the fruit and 12 per cent of the vegetables are exported each year, heading mainly to Germany, France and Austria. Around 15 per cent goes to countries outside the EU.

On the other hand, Italy is also an important fruit and vegetable importer. Fruit imports are predominantly tropical products such as bananas, pineapples or citrus, supplied mainly by Costa Rica, Spain and Colombia. Despite its large domestic production, Italy also imports a lot of tomatoes, as well as salad vegetables and potatoes. France, Spain and Germany dominate in this area.

In the last ten years, the importance of domestic berry production has increased. Some of these berries are also grown for export. As a result, relative growth in blackberry and blueberry exports is very high compared with other products, even if the volumes themselves remain modest.

Processing plays an important role in Italy's vegetable business, especially for tomatoes. In 2018 the country was the second-largest tomato processor worldwide; in addition to its sizeable fresh market, it produced another 4.7m tonnes of the product for processing in 2018.

Having reached their lowest level in 2013, purchases of fruit and vegetable in Italy have apparently increased year by year, and this trend is expected to continue – by the end of October 2018, fruit and vegetable sales were around 3 per cent higher than in the previous year. In 2017, each household purchased an average of 182kg of fruit and 150kg of vegetables. The value of both reached €555. Apples, oranges and bananas are the three most commonly purchased fruits; tomatoes, salads and courgettes are the top three in vegetables. In recent years, supermarkets and discounters have gained increasing importance: 61 per cent of fresh fruit and vegetables were bought in supermarkets in Italy in 2017, up from 51 per cent in 2007. Compared with Germany, discounters play a minor role with a share of 16 per cent, and traditional shopping centres such as farmer's markets (13 per cent) and greengrocers (22 per cent) remain more important. In southern regions and on the islands, the importance of these outlets is especially high.

PRODUCTION

VOLUME ('000 tonnes)

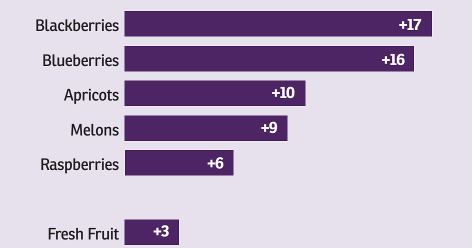
FRESH FRUIT	2015	2016	2017	2018p
Apples	2,280	2,272	1,704	2,200
Oranges	1,668	1,592	1,536	1,782
Table Grapes	1,045	997	926	933
Pears	764	681	738	741
Melons	595	632	606	610
Nectarines	736	657	688	580
Peaches [2]	589	536	588	498
Easy Peelers	752	698	650	486
Kiwifruit	575	452	369	435
Others	1,685	1,704	1,754	1,710
TOTAL	**10,448**	**10,056**	**10,009**	**9,975**

FRESH VEGETABLES [1]	2015	2016	2017	2018p
Tomatoes [2]	1,045	979	940	850
Fennel	524	505	511	505
Carrots	513	531	487	499
Courgettes	494	554	541	490
Lettuce	477	475	466	420
Onions	372	451	410	413
Cauliflower/Broccoli	400	388	372	360
Artichokes	349	366	388	357
Aubergines	300	318	286	290
Sweet Peppers	380	271	250	225
Others	1,876	1,989	1,960	1,940
TOTAL	**6,730**	**6,827**	**6,611**	**6,350**

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

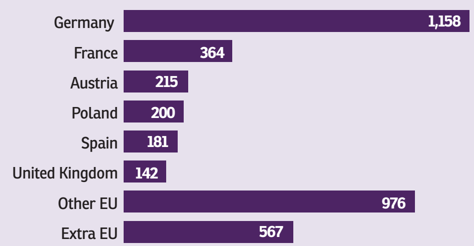
TOP 5 FRESH FRUIT EXPORTS

VOLUME GROWTH (% p.a. 2008-2017)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2017)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	679	712	775	800
Pineapples	139	141	164	182
Oranges	217	137	232	159
Lemons	115	104	122	117
Others	752	722	744	743
TOTAL	**1,902**	**1,816**	**2,037**	**2,001**

FRESH VEGETABLES [1]	2015	2016	2017	2018p
Tomatoes [2]	144	118	132	128
Lettuce	105	106	113	120
Sweet Peppers	76	71	74	84
Others	323	302	326	320
TOTAL	**647**	**597**	**646**	**652**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Apples	1,104	1,010	976	570
Table Grapes	462	474	502	520
Kiwifruit	349	413	322	272
Pears	148	150	138	196
Peaches/Nectarines	269	253	223	156
Oranges	120	152	111	141
Easy Peelers	79	88	94	71
Lemons	41	46	47	45
Plums	47	59	56	31
Others	334	416	525	525
TOTAL	**2,952**	**3,060**	**2,977**	**2,514**

FRESH VEGETABLES [1]	2015	2016	2017	2018p
Lettuce	184	200	191	203
Cauliflower/Broccoli	67	90	83	92
Carrots	74	98	76	79
Tomatoes	103	105	67	72
Kohlrabi/Kale	54	66	66	67
Beetroot	54	60	60	57
Fennel	57	62	50	54
Onions	41	45	43	36
Courgettes	29	34	28	24
Others	150	170	161	171
TOTAL	**813**	**930**	**827**	**856**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	1,659	1,625	1,780	1,779
Export	2,808	2,898	3,074	2,966
TRADE BALANCE	**1,149**	**1,273**	**1,294**	**1,187**

FRESH VEGETABLES	2015	2016	2017	2018p
Import	671	614	688	620
Export	1,148	1,230	1,250	1,237
TRADE BALANCE	**477**	**616**	**562**	**617**

Population
17.1 m

Area
41,500 km²

GDP per Inhabitant
43,000 EUR

GDP Growth
2.9 per cent

Unemployment
3.4 per cent

CPI for Food
(2015=100)
101.4

NETHERLANDS

The Netherlands might be among the EU's smaller countries, but its long coastline on the North Sea mean it punches above its weight as an important trading hub for fruit imports and exports. Its production might be relatively modest, but it exported a huge amount of fresh fruit in 2017, second only to Spain among EU countries. At the same time, a lot of fruit reaches Europe from overseas via Dutch ports. Bananas are the leading fruit import in volume terms, as well as the most important fruit export. Oranges, table grapes, pineapples and avocados make up the top five imports, while the other leading exports are pears, pineapples, table grapes and oranges.

Less than 10 per cent of all Dutch fruit exports are produced in the country itself. Around 85 per cent of domestic production is pears and apples, and like many other European countries the Netherlands saw its output limited in 2017 before recovering in 2018. Open-field production of strawberries has diminished slightly in recent years, while protected crop volumes have grown. The country's main fruit exports are pears, apples and strawberries, but with a rather limited export basket the trade balance for fresh fruit was negative for a long time. In 2016 and 2017 the trade balance was positive but that was expected to change back in 2018.

The situation in the Dutch vegetable market is different. With imports limited and production and exports of fresh vegetables high, the trade balance is obviously positive. Onions are the largest in terms of production and export volumes (the Netherlands is the second-largest exporter worldwide), with both cultivated area and export sales showing an upward trend. Due to the dry summer of 2018, onion production nearly halved and prices were at a record high by the end of the year. Export destinations are widespread, with a focus on Senegal and other African countries.

In addition to its huge onion production, the Netherlands is an important producer of glasshouse vegetables. This industry is dominated by tomatoes, production of which has been stable recently with a tendency towards more Roma-type varieties on the vine and snack tomatoes. The use of artificial light is gaining importance when it comes to growing premium tomatoes in winter. Planted area for cucumbers has decreased in the last few years, but there is a growing trend in the production of sweet peppers.

Germany is the main export destination for Dutch vegetables – about 46 per cent of all tomato exports went to Germany in 2017 – followed by the UK. For cucumbers, Germany has an even stronger share of 63 per cent. Traditionally, cabbage and carrots were important Dutch exports, normally heading for Germany and eastern Europe. But with increasing production in those countries and greater investment in storage capacity, these export trades are becoming more limited.

PRODUCTION

VOLUME ('000 tonnes)

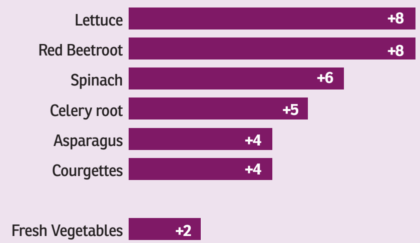
FRESH FRUIT	2015	2016	2017	2018p
Pears	349	374	330	398
Apples	336	317	227	259
Strawberries	58	61	66	68
Other Berries	17	18	17	17
Other	20	16	19	18
TOTAL	780	786	659	760

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	890	900	910	905
Onions	1,504	1,449	1,780	811
Carrots	563	601	611	490
Cucumbers	405	370	400	395
Peppers	360	365	370	365
Mushrooms	310	300	300	300
White Cabbage	142	129	138	125
Celery	71	75	101	90
Leeks	86	82	104	85
Iceberg Lettuce	90	89	84	80
Aubergines	53	54	53	52
Chicory	52	49	55	52
Spinach	47	45	60	50
Brussel Sprouts	60	47	53	48
Other	424	412	467	452
TOTAL	5,057	4,967	5,486	4,300

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

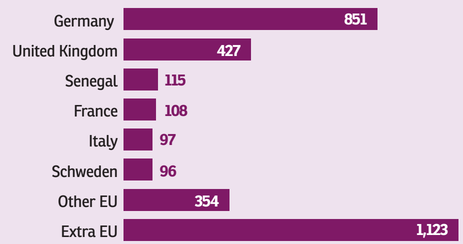
TOP 6 PRODUCTION OF FRESH VEGETABLES

VOLUME GROWTH (% p.a. 2008-2017)



FRESH FRUIT AND VEGETABLE EXPORTS

BY DESTINATION ('000 tonnes, 2017)



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

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [2]	2015	2016	2017	2018p
Bananas	741	875	980	1,127
Oranges	522	573	585	591
Table Grapes	353	353	381	393
Avocados	187	247	267	359
Pineapples	267	290	286	340
Apples	236	249	253	327
Other	1,509	1,717	1,810	1,895
TOTAL	3,815	4,304	4,562	5,032

FRESH VEGETABLES	2015	2016	2017	2018p
Onions	132	218	219	263
Tomatoes	184	222	221	234
Cucumbers	101	118	119	123
Peppers	91	92	92	96
Other	479	604	660	700
TOTAL	987	1,254	1,311	1,416

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT [2]	2015	2016	2017	2018p
in Total [1]	2,892	3,529	3,789	4,068
Dutch origin only				
Pears	171	186	171	170
Apples	68	56	58	70
Strawberries	32	30	32	31
Other	3	3	3	4
TOTAL	274	275	264	275

FRESH VEGETABLES	2015	2016	2017	2018p
in Total [1]	4,378	4,875	4,919	5,145
Dutch origin only				
Onions	1,046	1,052	1,137	1,205
Tomatoes	772	755	749	752
Peppers	307	307	315	315
Cucumbers	295	254	284	282
Carrots	65	52	75	95
Cabbage	114	99	100	93
Other	225	224	246	283
TOTAL	2,824	2,743	2,906	3,025

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT [2]	2015	2016	2017	2018p
Import	4,251	5,020	5,450	5,955
Export [1]	4,056	5,082	5,478	5,906
TRADE BALANCE	-195	62	28	-49

FRESH VEGETABLES	2015	2016	2017	2018p
Import	1,194	1,543	1,663	1,580
Export [1]	4,538	5,163	5,280	5,331
TRADE BALANCE	3,344	3,620	3,617	3,751

Population
38.0 m

Area
312,700 km²

GDP per Inhabitant
12,200 EUR

GDP Growth
4.8 per cent

Unemployment
3.0 per cent

CPI for Food
(2015=100)
101.4

POLAND

Every fourth apple produced in the EU comes from Poland, a statistic that puts it ahead of Italy and France as Europe's top apple-producing country. It also occupies a leading position for other fruit and vegetable crops like sour cherries, carrots and cabbage, and just outranks the Netherlands on mushrooms. But processing plays a major role in Poland's fruit and vegetable sector, as does the notable wild production of items like Chanterelle mushrooms and blueberries.

Apples account for 79 per cent of total Polish fruit production, with the largest concentration of orchards found in Grójec, around 40km south of Warsaw. Its main varieties are Idared, Shampion, Golden Delicious and Gala. Until Russia banned EU fruit imports in 2014, it was traditionally the main consumer of Polish apples, taking half of its neighbour's exports. With the market's closure, the flow of exports changed dramatically, for example bringing European and Arab countries suddenly into focus. In 2018/19, large stocks in the east of Europe are causing concern. Polish apples are present in almost all EU markets and are exerting pressure on prices.

For vegetables, Poland's output is very much focused on cabbage, carrots, onions and beetroot, vegetables that are very often used in traditional eastern European cuisine. In terms of exports, however, mushrooms are number one: most are exported to Western Europe, including speciality items like oyster mushrooms and shiitake. For cabbage, on the other hand, the main destinations are countries in south-east and eastern Europe, often those with historical connections to Poland. While Poland is a net importer of fruit, for vegetables it is usually a net exporter. However, imports have recently outstripped exports due to smaller harvests. Fruit imports consist mainly of items that cannot be grown in Poland, such as bananas, citrus and exotic fruits.

Behind Belgium, Poland is the second-largest producer of frozen vegetables in Europe. According to the Institute of Agricultural and Food Economics, its production amounted to 750,000 tonnes in 2017, just over half of all processed vegetables. The canned vegetable and tomato processing industries are also important. For fruit, one of Poland's strengths is the production of juice, nectar and fruit juice drinks. Poland is also the world's leading producer of blackcurrants, which are also used for juice.

Another mainstay is the production of frozen fruit and juice concentrate. In these two cases, Poland occupies a leading position in Europe. Apples especially are used to make juice and concentrate. For frozen fruit, strawberries, sour cherries and raspberries are the biggest items.

PRODUCTION

VOLUME ('000 tonnes)

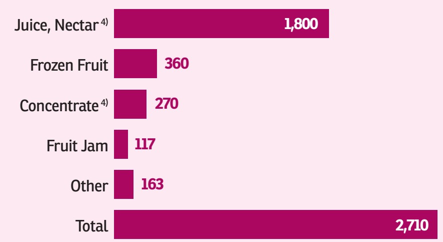
FRESH FRUIT [2]	2015	2016	2017	2018p
Apples	3,146	3,604	2,441	3,600
Strawberries	205	197	178	185
Sour Cherries	174	195	72	180
Currants	154	166	129	150
Raspberries	78	129	105	110
Plums	91	110	58	95
Pears	66	82	55	75
Aronia	43	49	49	49
Sweet Cherries	46	54	20	45
Other	46	58	44	56
TOTAL	4,049	4,644	3,151	4,545

FRESH VEGETABLES [3]	2015	2016	2017	2018p
Tomatoes	790	867	898	926
Cabbage	875	1,018	1,011	910
Carrots	678	822	827	820
Onions	548	651	667	650
Cucumbers	487	529	544	556
Mushrooms	315	320	325	330
Beetroot	297	341	336	320
Cauliflower	195	240	238	230
Other	925	1,142	1,184	1,188
TOTAL	5,110	5,930	6,030	5,930

1) Including re-export. 2) Including fruits for processing. 3) Excluding potatoes, open-field and under glass. 4) Including vegetable juice and nectar.
Sources: AMI-informiert.de; Eurostat; GUS; IERiGZ

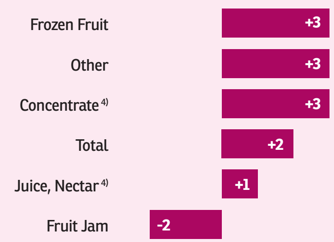
PROCESSED FRUIT PRODUCTION

('000 tonnes, 2017)



PROCESSED FRUIT PRODUCTION

VOLUME GROWTH (% p.a. 2008-2017)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	380	403	486	490
Oranges	170	168	161	160
Easy Peelers	163	172	157	160
Watermelons	123	134	142	136
Table Grapes	114	111	122	120
Other	509	516	616	609
TOTAL	1,459	1,504	1,684	1,675

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	144	146	142	144
Peppers	53	53	60	63
Cucumbers	56	55	58	58
Onions	73	60	49	54
Other	212	235	238	264
TOTAL	538	549	547	583

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Apples	946	1,092	991	900
Pears	29	50	42	38
Raspberries	18	19	10	18
Strawberries	17	15	9	16
Plums	7	9	3	10
Sour Cherries	13	9	2	9
Sweet Cherries	6	7	1	4
Other [1]	140	165	180	180
TOTAL	1,176	1,366	1,238	1,175

FRESH VEGETABLES	2015	2016	2017	2018p
Mushrooms	212	226	226	228
Onions	122	126	129	126
Tomatoes	98	98	84	85
Cabbage	65	37	50	44
Carrots	31	23	33	30
Cauliflower	28	28	24	24
Peppers	15	20	19	20
Other	110	142	134	131
TOTAL	681	700	699	688

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	1,217	1,283	1,492	1,450
Export	567	592	602	630
TRADE BALANCE	-650	-691	-890	-820

FRESH VEGETABLES	2015	2016	2017	2018p
Import	488	519	592	603
Export	568	590	582	575
TRADE BALANCE	80	71	-10	-28

Population 21.4 m

Area 819,900 km²

GDP per Inhabitant 46,000 EUR

GDP Growth 2.4 per cent

Unemployment 4.9 per cent

CPI for Food (2015=100) 101.8

NORDIC COUNTRIES

DENMARK, FINLAND, SWEDEN

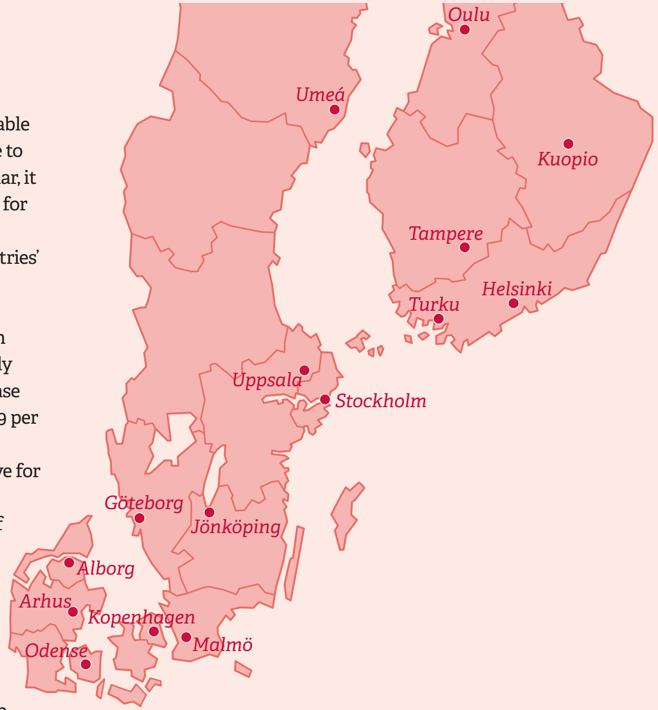
The climate in Sweden, Finland and Denmark precludes these countries from producing a lot of fruit and vegetables, so with their high consumer purchasing power they are particularly popular export destinations. That's especially true in Finland, where the domestic growing season is short due to the cold winters. Although Sweden and Denmark benefit from the warming Gulf Stream in winter, their summer months are only moderately warm. Thus, the three Nordic countries produce a combined vegetable volume of under 950,000 tonnes, equal to only 1.5 per cent of total European production.

The region's most significant vegetable crops are carrots, onions and cabbage, all grown in open field, and tomatoes, which are the leading crop under greenhouse cultivation. Of the three countries, Sweden has retained its position as the largest vegetable producer in recent years, but since 2012 Denmark's own vegetable production has shown an upward trend, mainly due to increased volumes of onions and carrots. In particular, it has been producing more snack and organic carrots for the European market.

At around 120,000 tonnes, the three Nordic countries' fruit production is much lower than their vegetable output. While apples and strawberries are the most important fruits produced, low domestic production means the countries rely heavily on imports and only export very small quantities of fruit, as is also the case for vegetables. Their self-sufficiency is only around 9 per cent for fruit, compared with around 62 per cent for vegetables. The foreign trade balance is very negative for both fruit and vegetables.

Overall, the trio imports about 660,000 tonnes of fresh vegetables per year, with a slight upward trend. The leading imports are tomatoes, salads and cucumbers, with volumes offset by exports of around 90,000 tonnes. Sweden imports the largest volume and has the highest domestic consumption of the three. However, it also has the largest population. Its per-capita vegetable consumption is around 50kg, compared with 70kg in Finland and 78kg in Denmark. The latter is the leading exporter of vegetables, with carrots accounting for more than half of the export volume. In recent years, carrot exports have risen sharply.

With a total of around 1.37m tonnes, fruit imports are significantly higher than vegetable imports. By far the biggest imported product are bananas, followed by apples for the fresh market and oranges. In the long term, white currants, raspberries and blackberries are among the most important imports, buoyed by growth in the Scandinavian berry market. Imports were offset by exports of just over 80,000 tonnes in recent years. The last two years showed an increase in fruit exports. Domestic per-capita fruit consumption is more similar across the three countries than it is for vegetables. In Sweden, it stands at around 70kg, in Denmark 68kg and in Finland almost 64kg.



PRODUCTION

VOLUME ('000 tonnes)

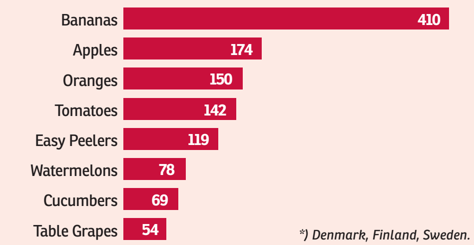
FRESH FRUIT	2015	2016	2017	2018p
Denmark	**62.8**	**51.6**	**40.2**	**53.3**
– Apples	28.5	23.0	18.5	25.0
– Pears	7.8	5.5	4.5	7.3
– Strawberries 2)	6.5	7.9	6.7	7.0
Finland	**23.1**	**21.5**	**24.1**	**24.0**
– Strawberries 2))	14.4	12.0	13.9	12.5
– Apples	6.0	6.4	6.8	6.5
Sweden	**45.6**	**45.2**	**41.6**	**45.5**
– Apples	25.4	26.8	22.1	25.0
– Strawberries 2)	17.1	15.3	15.7	16.0
TOTAL	**131.5**	**118.3**	**105.9**	**122.8**

FRESH VEGETABLES 1)	2015	2016	2017	2018p
Denmark	**316.2**	**315.0**	**333.0**	**298.0**
– Carrots	102.5	117.6	115.8	110.0
– Onions	54.7	62.0	61.9	49.0
– White Cabbage	22.4	23.8	27.6	23.5
Finland	**250.1**	**262.5**	**254.2**	**235.0**
– Carrots	63.9	73.0	62.5	56.3
– Tomatoes	38.9	40.6	39.4	40.0
Sweden	**380.6**	**372.4**	**341.6**	**322.0**
– Carrots	115.6	111.6	109.1	98.5
– Onions	64.6	59.4	53.0	45.0
TOTAL	**946.9**	**949.9**	**928.8**	**855.0**

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

FRUIT AND VEGETABLE IMPORTS 2017

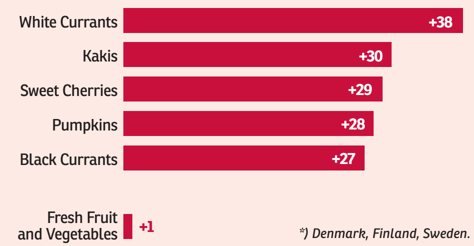
BY NORDIC COUNTRIES *) ('000 tonnes)



*) Denmark, Finland, Sweden.

TOP 5 FRUIT AND VEGETABLE IMPORTS

VOLUME GROWTH *) (% p.a. 2008-2017)



*) Denmark, Finland, Sweden.

IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Denmark	**379.6**	**367.8**	**370.5**	**385.5**
– Bananas	87.6	80.3	82.7	96.8
– Oranges	42.5	42.4	37.3	57.8
– Apples	56.8	49.2	48.6	51.0
Finland	**316.4**	**331.1**	**329.1**	**322.5**
– Bananas	101.9	110.5	114.0	111.7
– Apples	47.3	44.4	43.8	36.4
Sweden	**686.8**	**691.1**	**702.8**	**663.4**
– Bananas	208.8	201.9	213.6	197.6
– Oranges	92.7	92.2	84.7	70.3
TOTAL	**1,382.8**	**1,390.0**	**1,402.4**	**1,371.4**

FRESH VEGETABLES	2015	2016	2017	2018p
Denmark	**199.2**	**183.1**	**189.1**	**207.6**
– Tomatoes	36.1	34.9	33.7	37.1
– Cucumbers	21.9	21.3	21.4	26.3
– Lettuce	27.7	22.6	23.3	24.2
Finland	**122.3**	**126.6**	**125.5**	**136.8**
– Lettuce	23.9	25.8	26	26.5
– Tomatoes	28.1	27	24.8	26.4
Sweden	**342.4**	**351.2**	**347.6**	**351.4**
– Tomatoes	89.6	93.1	83.3	88.2
– Cucumbers	35.0	37.0	37.4	33.1
TOTAL	**663.9**	**660.9**	**662.2**	**695.8**

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Denmark	**33.5**	**34.3**	**37.7**	**45.9**
– Bananas	8.6	7.1	9.8	8.8
– Apples	4.0	4.6	4.3	8.4
Finland	**4.3**	**10.1**	**9.2**	**6.7**
Sweden	**48.8**	**45.2**	**47.4**	**56.4**
TOTAL	**86.6**	**89.6**	**94.3**	**109.0**

FRESH VEGETABLES	2015	2016	2017	2018p
Denmark	**60.0**	**57.5**	**54.6**	**52.6**
– Carrots	29.1	31.0	33.6	26.6
– Onions	12.0	11.4	6.0	8.2
Finland	**0.3**	**0.2**	**0.6**	**0.8**
Sweden	**15.4**	**21.9**	**19.7**	**19.1**
TOTAL	**75.7**	**79.6**	**74.9**	**72.5**

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	1,484	1,524	1,580	1,722
Export	111	117	121	128
TRADE BALANCE	**-1,373**	**-1,408**	**-1,459**	**-1,594**

FRESH VEGETABLES	2015	2016	2017	2018p
Import	961	977	1,025	1,084
Export	89	96	113	132
TRADE BALANCE	**-873**	**-881**	**-911**	**-953**

Population 46.7 m

Area 506,000 km²

GDP per Inhabitant 25,100 EUR

GDP Growth 3.0 per cent

Unemployment 11.2 per cent

CPI for Food (2015=100) 101.7

SPAIN

Spain is still by far the largest producer of fruit and vegetables in Europe. With a broad range of climates, Spain produces a wide range of fruit and vegetables from almost all climate zones. Its export-oriented production is concentrated in the eastern and southern parts of the country bordering the Mediterranean Sea.

Spain is also Europe's leading exporter of fresh fruit and vegetables, as well as one of its most dynamic. In the last decade, its fruit and vegetable exports grew by an annual average of 4 per cent, with vegetables slightly outperforming fruit. Growth rates were especially high for berries, watermelons and kiwifruit. Persimmons, known locally as kaki, were also a great success, but figures are only available for the last six years. Spain has also performed well exporting stonefruit: its success with peaches (rising 8 per cent per annum) is mainly due to growing exports of flat varieties, which have gained a significant market share in central Europe.

The highest relative growth rates in vegetable exports are found in some minor items like spinach or leeks, but the highest absolute growth rates can be observed in fruit vegetables like peppers, cucumbers and courgettes and in leafy salads and brassicas. Exports of the latter were mainly broccoli, while iceberg lettuce is still the most exported salad vegetable crop; growth in this category was due to the success of other articles like baby leaf or romaine hearts. Even exports of traditional items like the typical, large-sized Spanish onions grew by almost 14,000 tonnes per year in the period from 2008 to 2017.

In 2018, exports of fresh fruit have decreased according to preliminary data. A smaller harvest of peaches and nectarines was partly responsible, while a rather cool spring led to limited availability of strawberries and early melons. The hot and long summer in central Europe prompted record exports of watermelons, however. Exports of fresh vegetables increased after a dip in 2017, which was caused by low temperatures. Pepper and cucumber exports will probably reach record levels.

Spanish exports go mostly to other EU countries, with only 7 per cent sent to third countries. Germany (26 per cent) is the most important destination, followed by France (18 per cent), the UK (12 per cent), the Netherlands (8 per cent, often re-exported) and Italy (6 per cent).

Spanish imports, meanwhile, are growing but still of limited importance compared with exports. Offering high per-capita consumption, the domestic market is also an interesting destination for Spanish producers. Compared with Germany, private households in Spain buy double the quantity of fresh fruit and vegetables. According to panel data published by the Spanish Agricultural Ministry, Spanish households are buying slightly less fresh fruit, while quantities of fresh vegetables and potatoes remain constant. About 25 per cent of the budget for fresh fruit and vegetables is still spent at traditional shops, mainly greengrocers. These outlets are more important for fruit than for vegetables.

PRODUCTION

VOLUME ('000 tonnes)

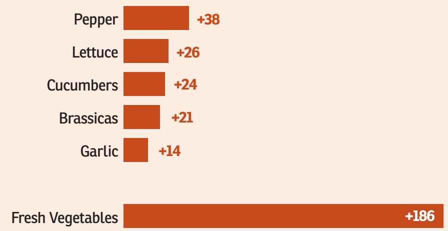
FRESH FRUIT	2015	2016	2017	2018p
Oranges	3,087	3,655	3,369	3,717
Easy Peelers	1,992	2,343	1,996	2,400
Watermelons	1,040	1,092	1,115	1,099
Lemons	776	996	928	1,092
Melons	692	650	611	680
Peaches 1)	566	570	709	623
Nectarines	556	535	693	582
Apples	482	495	480	473
Strawberries	399	378	360	345
Other	3,306	2,977	3,705	3,350
TOTAL	12,896	10,714	10,261	11,011

FRESH VEGETABLES 2)	2015	2016	2017	2018p
Tomatoes 1)	2,125	2,428	2,113	2,300
Onions	1,108	1,450	1,303	1,431
Peppers 1)	1,040	1,075	1,151	1,170
Lettuce	927	930	890	843
Cucumbers	705	631	611	690
Courgettes	543	582	592	587
Broccoli	452	479	525	520
Carrots	411	401	388	374
Green Beans	180	182	165	157
Other	1,800	1,831	1,909	1,946
TOTAL	9,291	9,989	9,647	10,018

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

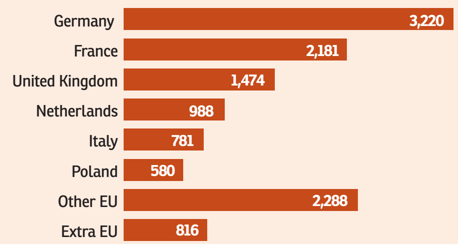
TOP 5 FRESH VEGETABLE EXPORTS

VOLUME GROWTH ('000 tonnes p.a. 2008-2017)



FRUIT AND VEGETABLE EXPORTS 2017

BY DESTINATION ('000 tonnes)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	228	285	307	365
Kiwifruit	148	162	217	175
Apples	203	223	192	155
Oranges	133	164	174	155
Other	681	779	816	940
TOTAL	1,393	1,613	1,706	1,790

FRESH VEGETABLES 1)	2015	2016	2017	2018p
Beans	109	138	121	140
Tomatoes 1)	85	92	99	90
Onions	41	71	54	85
Other	197	203	307	285
TOTAL	432	504	581	600

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Oranges	1,891	1,556	1,604	1,540
Easy Peelers	1,566	1,464	1,356	1,370
Watermelons	655	719	739	847
Lemons	639	545	689	595
Melons	435	444	441	410
Peaches	379	407	454	385
Nectarines	470	419	469	375
Strawberries	283	311	304	280
Kaki	185	193	215	200
Other	1,081	1,141	1,202	1,103
TOTAL	7,584	7,199	7,473	7,105

FRESH VEGETABLES 1)	2015	2016	2017	2018p
Tomatoes	950	908	810	830
Lettuce	724	743	762	830
Peppers	672	701	689	755
Cucumbers	625	632	627	650
Brassicas	450	464	447	490
Courgettes	276	327	320	370
Onions	354	357	337	330
Aubergines	159	153	144	160
Garlic	149	163	166	150
Other	560	615	547	560
TOTAL	4,919	5,063	4,849	5,125

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	1,336	1,576	1,740	1,910
Export	7,063	7,340	7,437	7,700
TRADE BALANCE	5,727	5,764	5,697	5,790

FRESH VEGETABLES 2)	2015	2016	2017	2018p
Import	473	520	565	580
Export	4,746	5,092	5,174	5,070
TRADE BALANCE	4,273	4,572	4,609	4,490

Population 66.2 m

Area 248,500 km²

GDP per Inhabitant 35,300 EUR

GDP Growth 1.7 per cent

Unemployment 3.0 per cent

CPI for Food (2015=100) 103.4

UNITED KINGDOM

Domestic fruit and vegetable production in the UK is relative small, although it is the EU's eighth-largest producer of vegetables. After a low around 2005, its vegetable production area has recovered to around 125,000ha, of which 35,000ha are used to grow peas for processing. An additional 33,500ha are peas harvested dry, which are usually not counted as vegetable area. Protected veg production is insignificant, at just 850ha.

In terms of EU fruit production, the UK sits in twelfth place. Production of apples and pears appears small, with the notable point that the country grows a high proportion of 'culinary apples' (essentially Bramley), which are not consumed raw. The soft fruit sector, in the meantime, is developing very dynamically. Since 2000, its production has more than doubled, and for the most part is now essentially protected cultivation under plastic tunnels. Overall growth in Glasshouse fruit (140ha in 2006, 217ha in 2017) has outpaced glasshouse vegetables (700ha in 2006, 850ha in 2017).

The 2018 season was characterised by below-average temperatures in February and March and very high rainfall in March, April and May, making it difficult to plant field crops in time. In June and July there was practically no recorded rain, and precipitation in August was still below average. Southern parts of the UK, along with Belgium and southern Netherlands, were among Europe's driest regions in the hot summer of 2018. Frequent irrigation could not safeguard all crops, with high temperatures promoting plant diseases and stress to field crops. This resulted in below-average yields across the board.

Due to its relatively small domestic production, the UK is one of Europe's largest importers of fresh fruit and vegetables, ranking second in the EU for both. Two-thirds of its fresh vegetables come from Spain and the Netherlands, with only 12 per cent from third countries. Last year's small domestic crop was compensated in part by more imports from those two sources.

By contrast, almost two-thirds of its fruit come from third countries – in addition to the traditional banana suppliers of south and central America, South Africa (9 per cent) plays a prominent role. The most important EU source is Spain (16 per cent). As imports have climbed year on year, the UK's self-sufficiency rate for fruit has fallen to 16 per cent, while for vegetables it is higher at 53 per cent. The degree of self-sufficiency in 2018 is likely to be even lower.

Brexit is a point of constant discussion in the UK and on the Continent. But, since the exact new rules of trade after March 2019 are still not known, the effects remain difficult to predict. Massive changes of trade flows are unlikely, but bureaucratic obstacles may turn out to be a real problem.

The UK's fresh fruit and vegetable exports are minor, although in the past five years re-exports of items including bananas and oranges have risen. In 2017, UK household spending on fresh fruit and vegetables (including fresh-cut, excluding potatoes) was the second highest in the EU at €13.2bn, just behind Germany (€14.8bn).

PRODUCTION

VOLUME ('000 tonnes)

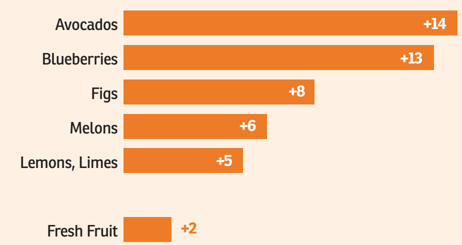
FRESH FRUIT [1]	2015	2016	2017	2018p
Apples	243	244	206	220
Strawberries	115	120	128	125
Pears	25	27	25	21
Raspberries	17	16	17	16
Blackcurrants	15	12	14	14
Plums	11	9	8	8
Cherries	5	2	6	5
Other Soft Fruit	9	8	11	10
Other	4	5	4	5
TOTAL	444	443	419	424

FRESH VEGETABLES [2]	2015	2016	2017	2018p
Carrots	731	746	866	700
Onions	492	432	454	332
Cabbage	230	232	224	210
Peas [1]	157	157	129	140
Lettuce	122	93	99	90
Turnips and Swedes	104	88	90	90
Cauliflower	91	82	90	85
Parsnips	84	81	90	80
Celery	54	53	53	50
Brussel Sprouts	51	51	51	50
Other	283	264	268	223
TOTAL	2,399	2,279	2,414	2,050

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

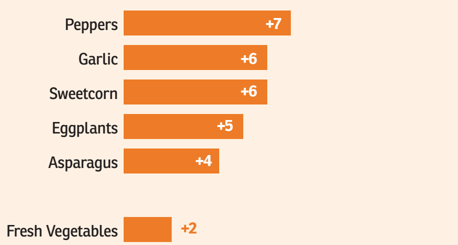
TOP 5 FRESH FRUIT IMPORTS

VOLUME GROWTH (% p.a. 2008-2017)



TOP 5 FRESH VEGETABLE IMPORTS

VOLUME GROWTH (% p.a. 2008-2017)



IMPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	1,152	1,211	1,235	1,210
Apples	413	382	525	520
Melons	269	301	306	320
Easy Peelers	307	317	289	300
Oranges	286	292	287	290
Table Grapes	258	275	271	270
Pineapples	144	148	168	165
Lemons, Limes	137	148	154	160
Pears	150	146	133	140
Other	588	647	643	705
TOTAL	3,705	3,867	4,013	4,080

FRESH VEGETABLES	2015	2016	2017	2018p
Tomatoes	402	402	399	405
Onions	391	395	343	390
Peppers	183	208	197	205
Lettuce, all	207	221	193	200
Cucumbers	153	167	160	165
Cauliflower/Broccoli	161	154	137	155
Mushrooms	125	123	126	125
Celery	49	73	39	40
Other	584	625	595	695
TOTAL	2,256	2,369	2,189	2,380

EXPORTS

VOLUME ('000 tonnes)

FRESH FRUIT	2015	2016	2017	2018p
Bananas	32	55	59	60
Oranges	29	30	31	35
Apples	20	17	26	20
Other	49	41	61	65
TOTAL	130	142	177	180

FRESH VEGETABLES	2015	2016	2017	2018p
Carrots and Turnips	38	21	23	20
Cauliflower/Broccoli	9	7	8	7
Onions	10	10	6	6
Other	96	117	93	87
TOTAL	153	155	130	120

TRADE BALANCE

VALUE (million euros)

FRESH FRUIT	2015	2016	2017	2018p
Import	4,257	4,391	4,474	4,520
Export	136	139	178	181
TRADE BALANCE	-4,122	-4,252	-4,296	-4,339

FRESH VEGETABLES	2015	2016	2017	2018p
Import	2,866	2,776	2,767	2,825
Export	132	131	127	124
TRADE BALANCE	-2,734	-2,645	-2,640	-2,701

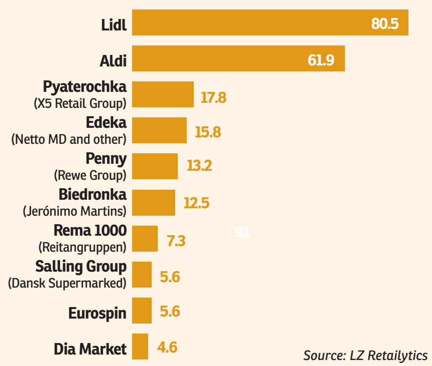
DISCOUNT RETAILING IN EUROPE

While it is by no means clear if the world's first discount store was in Germany, the country can certainly claim to have achieved the greatest economic success in discount retailing – something that holds true in their home market as well as in neighbouring European countries. In 1962, the Albrecht brothers opened their first Aldi supermarket, in Essen, featuring a characteristically limited number of products, self service directly from pallets or cartons, and constantly low prices – the latter made possible by extremely efficient logistics along the whole supply chain. Until the early 1990s, Aldi's cash registers did not have scanners, apparently because they were too slow. Every cashier knew the price of the 600 articles by heart.

In the sixties and seventies, discounters did not sell any fresh produce at all. Only in the early eighties did the first fruit and vegetables appear, starting with bananas and cucumbers. Nowadays most discounters even manage to overtrade in fresh produce. In countries where discounters had a high market share, like Austria and Germany, the high turnover rate was an advantage when it came to produce. Since there were no coldstorage facilities in these countries' supermarkets, the quality of produce sold through discounters was sometimes better, although that advantage disappeared when the conventional chains began investing in such technology.

TOP 10 DISCOUNTERS IN EUROPE

NET TURNOVER (billion euros 2017)



Source: LZ Retailytics

With a turnover of €81bn in 2017 (according to LZ Retailytics), Lidl is Europe's leading discounter. That's because, despite being number two in its home market Germany, it invested earlier and faster than the country's biggest discounter Aldi in other European countries. Still far ahead of their competitors, the two companies remain undisputed leaders at the top of Europe's discount ranking. Aldi's European turnover is estimated at €62bn. Which means it's only from third place down that the rankings tend to change: Russian retailer X5 Retail Group (Pyaterochka) recently overtook Edeka Group's discount banners (mainly Netto Marken Discount), pushing it into fourth place. While the leading German discounters already have a strong foothold and high share in western European markets – the UK being a notable exception – but the Russian newcomer (estimated turnover €18bn) has almost unlimited opportunities to expand in the east.

Number five in the European ranking is Penny, the discount division of German supermarket chain Rewe. Number six is Poland's Biedronka, a subsidiary of Portuguese retailer Jerónimo Martins. Places seven and eight are occupied by Scandinavian companies Rema 100 and Dansk Supermarked (with its main format Netto). Southern European companies Eurospin (Italy) and Dia Market (Spain) respectively make up the last two places in the top ten.

The level and development of discount market share in fast-moving consumer goods (FMCG) varies greatly from country to country. The highest market share in Europe, with more than 60 per cent of expenditure on FMCG, is in Norway, but within the EU the leaders are Denmark and Germany. In the UK and France, which are at the lower end of the FMCG ranking, the trends are completely different. Discounting in the UK is still growing rapidly, but the market share of discounters in France has decreased slightly in the last two years. Some eastern European countries like Croatia and Bulgaria are also at the lower end of the scale. Spain, meanwhile, was the country with the lowest discount share of FMCG in the EU in 2017, albeit growing rapidly; Spanish consumers still buy a lot of produce at street markets or at traditional shops, something that is also true to a lesser degree in Italy.

In most countries for which we have data, discounters are overtrading in freshproduce, Italy being the only exception. Many discounters use fresh fruit and vegetables to attract customers into their stores, and because perishable products have to be bought more frequently than other foods, the fruit and vegetable department is strategically important.

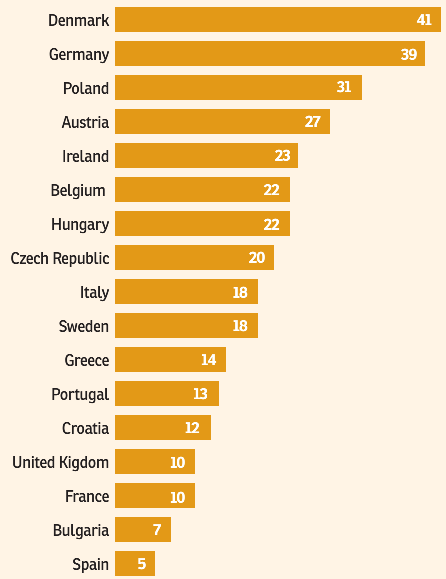
What's more, discounters' share of fresh fruit and vegetable spending has grown ever since the category was introduced, but this growth differs according to segment and country. In Germany in 1986, just five years after discounters started selling produce, the percentage of leafy vegetables sold there was already 14 per cent. Six years later, in 1992, that figure was 24 per cent; in 2017, it reached 52 per cent. In the past four years, volume growth in leafy vegetables has stopped, but expenditures have kept rising – partly due to a real price increase but mainly thanks to shoppers trading up. The comparatively cheap iceberg lettuce, for example, accounted for 37 per cent of category spending at discount in 2012, but only 31 per cent in 2017. At the same time, high-priced items like rocket and lambs lettuce increased their share – a trend seen not only in the discount sphere but also other trade channels including supermarkets.

Discounters are growing fastest in the UK. Although the German chains have been active there for a long time, they only really began to take off 15 years ago. For a very long time, conventional wisdom suggested a pronounced class consciousness would stop British consumers buying from discount stores. But with new product ranges and a refreshed image – focused on

Continued on page 26

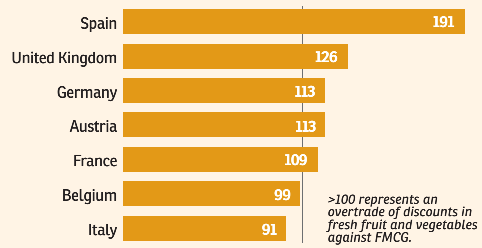
SHARE OF DISCOUNTERS

EXPENDITURES FOR FMCG 1) (% 2017)



DISCOUNT TRADING

RELATIVE COMPARED TO FMCG 1) (% 2017)



1) Fast-moving consumer goods.
Sources: AMI-informiert.de; Europanel; GfK; KantarWorldpanel

Continued from page 25

DISCOUNT RETAILING IN EUROPE

smart, rather than stingy, shoppers – sales started to grow. Fresh produce has played an important role in this success story: Aldi and Lidl recently overtraded in several categories including potatoes, soft fruit, citrus, fresh-cut salads and leafy vegetables.

France is a noteworthy exception. There, discount's share of fresh fruit and vegetable sales peaked around 2010 at around 11 per cent. Supermarkets specialising in fruit and vegetables have emerged as strong competition to both the hypermarkets and the discounters. By presenting a huge range of fresh produce at competitive prices, these formats have attracted consumers and kept a lid on the discounters' market share.

When it comes to product mix, the difference between discounters and supermarkets is not as pronounced as one might think. Even rather sensitive segments, like fresh-cut salads, are well represented in discount stores. In Germany, the UK and Spain, they are even overtraded by discounters, and even in France fresh-cut salad sales are trading at 70 per cent relative to the fruit and vegetable category. Organic produce is present too, with discounters overtrading in major organic lines such as bananas and carrots, although a limited portfolio of products means this does not hold true for the whole organic category.

Bananas generate the biggest discount sales, something that's also true in southern Europe. In the vegetable segment, carrots, tomatoes and cucumbers have a high discount share. The same could be said of potatoes if the organised retail sector were taken into account. But in countries like Germany or Austria, direct sales from producer to consumer still command a certain importance, lowering the market share of discounters and supermarkets.

It is difficult to calculate the real difference in terms of consumer prices between discounters and supermarkets, because each trade channel's specifications are usually slightly different. Discounters benefit from a relative price advantage, and the perceived difference is higher in an undersupplied market where average prices are high than it is in an oversupplied market with depressed prices. Consequently, in Germany the discounters have gained more market share during years when prices were higher. Preliminary data for 2018 show an increase of discount market share in fresh vegetables and a decrease in fresh fruit. In Italy and Spain, discount share has reportedly grown again in the first half of 2018.

However, low prices alone are no longer a guarantee of success. One leading discounter was forced to learn this lesson the hard way, because a lack of innovation drove away the next generation of young consumers. Ranges have to be monitored and renewed constantly. The number of fresh produce lines has grown quickly in the last few years, but of course this growth has its limits, because the advantage of efficient logistics depends on a limited number of lines. In the end, a discount store still has to offer low prices.

FRESH FRUIT

SHARE OF DISCOUNT (%)

TOTAL EXPENDITURE	2015	2016	2017
Germany	43.5	44.4	44.8
Austria	31.4	31.9	31.4
Belgium	19.0	19.3	19.7
Italy	13.3	14.2	14.9
France	11.5	10.9	11.1
Spain	9.1	9.9	10.3

TOTAL QUANTITY	2015	2016	2017
Germany	50.5	51.2	51.9
Austria	38.0	38.4	37.4
Belgium	22.4	22.4	22.1
Italy	13.9	14.8	15.3
France	13.2	12.4	12.9
Spain	10.4	11.3	11.6

FRESH VEGETABLES

SHARE OF DISCOUNT (%)

TOTAL EXPENDITURE	2015	2016	2017
Germany	41.4	42.0	43.1
Austria	29.6	29.5	29.6
Belgium	22.5	22.5	23.4
Italy	15.6	16.5	17.1
France	11.5	10.9	11.1
Spain	9.3	9.9	10.2

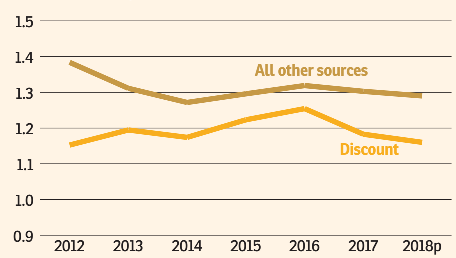
TOTAL QUANTITY	2015	2016	2017
Germany	51.0	51.0	51.8
Austria	41.7	41.1	41.0
Belgium	25.9	25.9	26.2
Italy	19.8	20.8	21.3
France	13.9	13.2	13.4
Spain	10.3	10.8	10.9

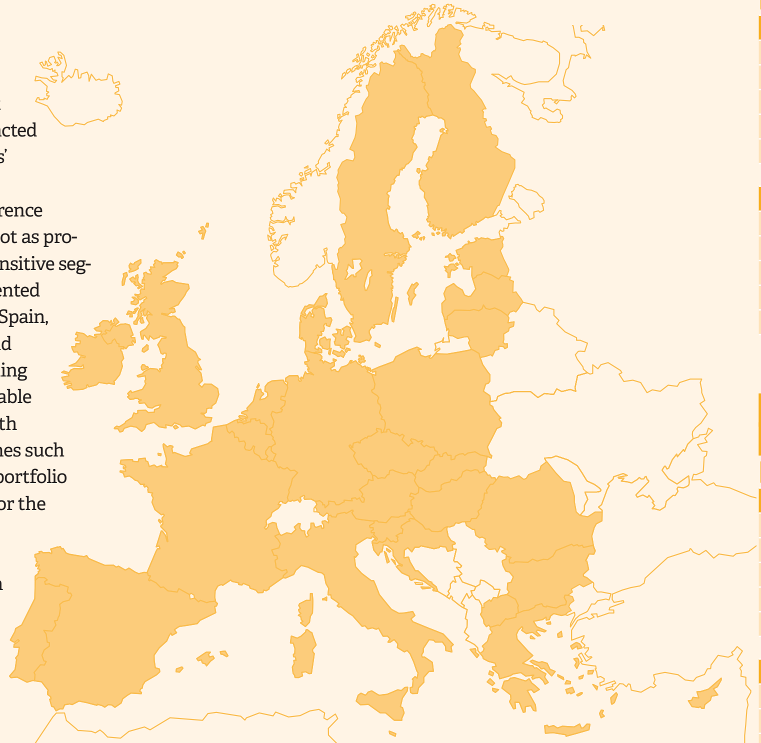
1) Fast Moving Consumer Goods.

Sources: AMI-informiert.de; Europanel; GfK; KantarWorldpanel

CONSUMER PRICE FOR BANANAS

GERMANY (euros/kg)





DISCOUNT SHARE OF FRESH FRUIT

(% 2017)

SHARE OF VALUE	Germany	Italy	Spain
Apples	41.8	15.1	10.4
Bananas	50.4	19.5	16.0
Oranges	44.9	12.6	6.9
Pears	46.8	14.3	9.9
Watermelons	47.3	14.8	9.9

SHARE OF QUANTITY	Germany	Italy	Spain
Apples	47.1	16.1	12.2
Bananas	56.6	21.5	19.1
Oranges	53.6	12.9	7.7
Pears	52.0	14.6	11.6
Watermelons	53.4	15.2	12.1

DISCOUNT SHARE OF FRESH VEGETABLES

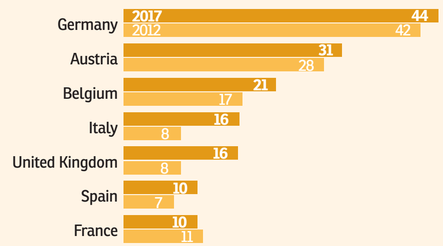
(% 2017)

SHARE OF VALUE	Germany	Italy	Spain
Carrots	48.9	.	14.2
Leafy vegetables	42.9	17.7	10.3
Onions	43.5	.	11.2
Potatoes	36.1	21.0	10.7
Tomatoes	50.7	19.4	10.3

SHARE OF QUANTITY	Germany	Italy	Spain
Carrots	57.4	22.6	18.8
Leafy vegetables	52.2	14.3	10.0
Onions	54.2	21.3	12.9
Potatoes	44.8	21.6	12.2
Tomatoes	56.8	18.9	11.2

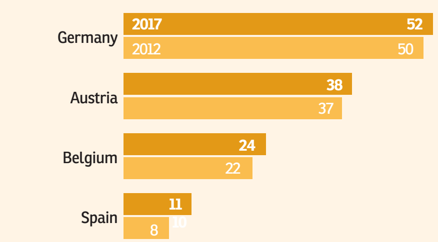
SHARE OF DISCOUNT

IN TOTAL EXPENDITURE FOR FRESH FRUIT AND VEGETABLES (%)



SHARE OF DISCOUNT

IN TOTAL QUANTITY BOUGHT FOR FRESH FRUIT AND VEGETABLES (%)



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