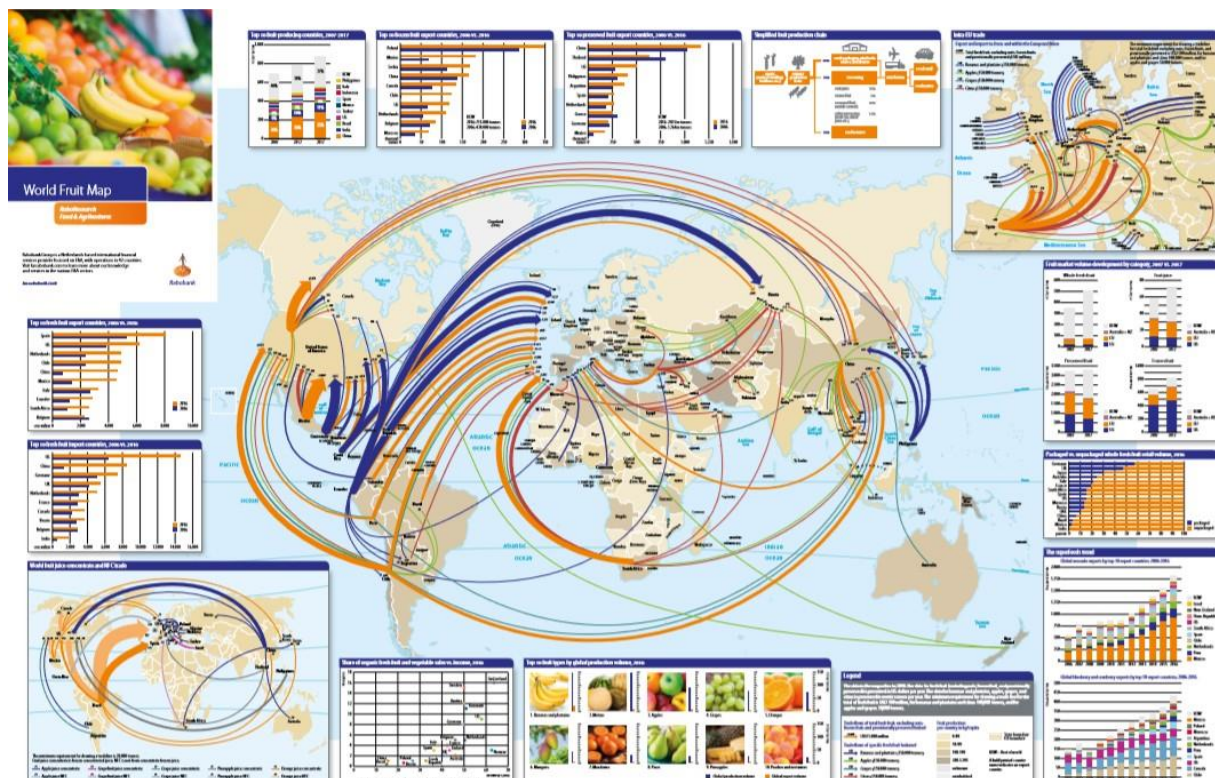


World Fruit Map 2018 - Global fruit sector mapped

The World Fruit Map 2018 literally maps the most important international trade flows. The infographic, made by Dutch bank Rabobank, also provides an insight into various global trends, such as the strongly risen trade in fresh fruit, mostly from South America. The trends of the growing consumption of fresh fruit outside of Europe and North America, the rise of trade in avocados and blueberries and the popularity of frozen fruit are other examples.



Growth

Globally, the market for fresh unprocessed fruit has grown by almost 4 per cent on average in volume in the past decade. While that growth in relatively mature markets in the EU and North America was about 1 per cent, the rest of the world experienced a much stronger growth, mostly due to a higher population and prosperity growth.

Frozen fruit popular

The frozen fruit segment grows even quicker than fresh fruit on average. Although this is a very small segment in the total fruit market (less than 1 per cent), the use of frozen fruit is increasing globally. Freezing is one of the best methods to retain the fruit's flavour and nutritional value. This is primarily

a solution for very perishable products such as blueberries and strawberries. Frozen, these products can be sold in all corners of the world throughout the year, and they can also be processed into jams, bakery products and juices later than usual.

Fruit juice and tinned fruit, on the other hand, are losing ground. Fruit juice is the largest processed fruit segment, but one of which consumption is dropping considerably in Europe and North America. The same is true for tinned fruit. These segments are probably dealing with a relatively bad image due to the added sugars, which is why more consumers are choosing fresh.

Consumers increasingly prefer 'more expensive' fruit

The Rabobank expects that the market value of fresh fruit will grow quicker than market volume in the EU in coming years. This is because of a shift of consumer preferences for 'more expensive' fruit. The consumption of, for example, oranges and traditional apple and melon varieties is under pressure. At the same time, the consumption of berries, new small melon varieties, avocados, mangoes and new varieties of apples and grapes is increasing.

Social media

The popularity of avocados and mangoes is partially thanks to the availability of ready-to-eat products in Europe. Social media appear to play an ever more important part in consumer's choices. Blueberries and avocados have built themselves an image of 'super foods' in no time, and are therefore 'extra healthy' in the eyes of consumers. The global trade in these products has tripled in the past decade.

Organic fruit 5% market share in the Netherlands

In recent years, the organic fruit segment experienced a considerable market growth globally. About 5 per cent of fresh fruit and vegetables bought in Europe have been grown organically. The share in the Netherlands is about average. Belgium, France, Spain and Italy are below this level, while the US, Germany, Austria, Switzerland and Sweden have a larger organic market share. These are countries with a similar or higher average spending power than the Netherlands. Besides prosperity, other factors also play a part in buying organic products, such as socio-cultural factors, price and availability of organically and conventionally grown products.

International trade

Globally, the production of fruit is rising by more than 2 per cent per year on average, while the trade in fruit rose by 7 per cent per year. The global trade in fruit is increasing more quickly than production. Currently, about 9 per cent of the fruit grown globally is traded internationally. The Rabobank expects that trade will continue to grow considerably. The Netherlands is a small production country for fruit,

but it's a major transit country for the EU market. For example, the Netherlands is the third largest export country globally of avocado, a fruit which has gained much popularity.

Fruit more often processed than vegetables

The three largest fruit producing countries are China, India and Brazil, combined they are good for 48 per cent of global production. Fruit is processed much more often than vegetables, into juice, tinned foods, and increasingly into frozen fruit as well, among other things. The considerably risen popularity of soft fruit in particular, including blueberries and raspberries, has contributed to a globally growing consumption of and trade in frozen fruit.

Logistics and storage very important

Storage and logistics are extremely important for the trade in fruit. Because of 'controlled atmosphere' storage, some kinds of fruit such as apples and pears can be stored for longer periods, because the oxygen content is lowered artificially while the carbon dioxide content is increased. Due to good quality controls, storage and conditioning, the fruit can be transported over long distances relatively sustainably by boat. Because of this, countries such as Chile, South Africa, New Zealand and Peru managed to find sales markets for their fruit globally. Besides, these countries have the geographical advantage of a favourable climate and their position in the Southern Hemisphere. People grow in the opposite seasons of countries in the Northern Hemisphere because of this.

Chilean fruit globally

Chile exports relatively many different types of fruit, such as grapes, apples, blueberries, cherries, kiwi fruit, avocados and citrus to destinations all over the world. This fruit giant profits considerably from the emerging Asian market. Spain and the US might be larger fruit exporting countries than Chile, but they mostly export to neighbouring countries in the EU and NAFTA, respectively.

Spain is the most dominant fruit exporting country in the EU, with citrus in particular. Italy is relatively strong in the export of grapes and apples. The largest producer and exporter of apples within the EU is Poland, for both fresh apples and apple juice. Since the Russian boycott, Belarus has become the largest destination for Polish apples.

Banana trade: from boat to container

The fruit eaten and traded most throughout the world has been bananas for years. Ecuador, Guatemala, Costa Rica, Colombia and the Philippines are the most important export countries of bananas. The US, Germany and Russia are the most important import countries. The flow of bananas from Ecuador to the EU is about as large as the flow to Russia.

Belgium a transit country, the Netherlands catching up

Belgium is the largest transit country of bananas in Europe, but the Dutch ports have been working on emerging in recent years. This is partially due to the increased containerisation: instead of complete boats filled with bananas, more and more bananas are now transported in containers. Containers offer more flexibility in transport quantities and in the choice of ports. The Netherlands is profiting from this.

Dutch importers with a large network have best papers

For Dutch fruit companies, various factors decide their favourable transit position. Think of good relationships with companies in countries of origin, efficient ports, good infrastructure and good trade conditions within the EU. Depending on the outcome of the negotiations, Brexit will mainly affect Dutch exporters of pears and soft fruit to a greater or lesser extent. Another challenge is the growing market outside of Europe. Because rising markets such as China and India import more and more fruit, availability of fruit for the European market is decreasing. Purchases from overseas regions could become more complex or expensive as a result.

A look at the future

The Rabobank expects that the global trade in fruit will continue to grow. This has multiple causes. For example, the population and prosperity increase in large parts of the world, the growing, year-round demand for 'new,' better and different products that can't be grown in the consumers' own country. Besides, production methods, cold supply chains, storage, packing and transport are becoming ever-more sustainable, so that globalisation becomes obvious. Possible threats for international trade are diseases that could erupt on a large scale, such as fungus diseases in the production of bananas, and trade restrictions due to, for example, political tensions.

The Netherlands

The position of the Netherlands as production country on the global playing field is minimal. For growers in the Netherlands, this means they'll have to continue to focus on the production of high-quality distinctive types of fruit, and supplying added value and services for the local market. For instance, processed fruit, niche products, fruit for new sales channels (snack boxes, meal salads) and prepackaged fruit snacks.

For the many fruit importers in the Netherlands, there will continue to be a role in buying fruit for the European hinterland due to the ports. However, the growth of these will decrease due to more direct export to other EU member countries and due to a considerable growth of fruit demand in emerging

markets in Asia and the Middle East. For fruit importers, it's therefore important to continue to add value to suppliers and buyers.

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