

Global trade in fresh fruit increased by 2 million tonnes per year in the past 10 years

The international trade in fresh fruit increased by an average of 2 million tonnes per year to about 80 million tonnes in the past 10 years. For comparison: in fresh vegetables, this figure is 40 million tonnes.

In percentage terms, the global trade in fresh fruit grew by more than a third in the 2006/16 period. In 2017, global trade continued to grow. Figures up to the third quarter indicate that global trade in fresh fruit increased again, by at least 2 million tonnes. The global trade in fresh fruit has a value of 75 billion dollar nowadays, whereas that figure for fresh vegetables is 40 billion dollar.

Plenty of fresh fruit is traded between the various regions in the world. To map trade in fresh fruit, we'll assume ten regions in this article: the EU, the former Soviet Republics (excluding current EU members), the rest of Europe, Africa, West Asia, the Gulf states, Southeast Asia, Oceania, North America (including Mexico) and Latin America.

In ten years time, the five most important trade flows remained the same. Ten years ago, these five flows amounted to 67 per cent, now they amount to 64 per cent. The share of the two most important flows (EU > EU and Latin America > EU) decreased (considerably), from 41 to 35 per cent.

Mutual trade among EU countries most important

The five most important trade flows in fresh fruit are: EU > EU, Latin America > EU, Latin America > North America, Southeast Asia > Southeast Asia, and North America > North America. By far the most important trade flow in fresh fruit is that among EU countries mutually. Although the mutual trade between EU countries grew by more than 20 per cent in the past ten years, importance in global trade dropped from 27 to 24 per cent.

The importance of the second trade flow, that of export from Latin American countries to the EU, also dropped, despite a growth (16%), from 14 to 11 per cent. The increase in export of fresh fruit from countries in Latin America to North America (including Mexico) grew more than averagely. The share in the global total grew from 10 to 11 per cent. The fourth trade flow is that between countries in Southeast Asia. Between these countries, trade in fresh fruit increased by 76 per cent in the past ten years. The total share increased from eight to ten per cent.

Remarkably for the smaller trade flows we saw stagnation of trade in fresh fruit from Africa and West Asia to the EU, the growth of mutual trade between countries in Latin America, the considerable increase of export from Latin America to countries in Southeast Asia.

As a region, Latin America is the most important exporter with a share of around 30 per cent. The EU countries are the most important importers with a share including internal trade of 40 per cent. Excluding the mutual trade of the regions, the EU's share is a third. Looked at this way, the EU share in export in fresh fruit isn't even ten percent.

Regarding growth in absolute amounts, Latin America is first with an increase in the export of fresh fruit of almost seven million tonnes in ten years. Countries in Southeast Asia have shown the largest absolute growth in import, 5.6 million tonnes.

Bananas by far the most important product

Bananas, with 20 million tonnes or 30 per cent globally, is by far the most important fresh fruit product traded internationally. Even with mutual trade among EU countries, bananas are by far the largest product. The other major products are apples (8.6 million tonnes), oranges (6.7 million tonnes), tangerines (5.1 million tonnes), grapes (4.3 million tonnes), pineapples (3.6 million tonnes), watermelons (3.3 million tonnes), lemons (3.1 million tonnes), pears (2.7 million tonnes) and peaches / nectarines (2.1 million tonnes).

Re-export important within the EU

A number of countries within the EU, particularly the Netherlands and Belgium, are transit countries to other EU countries. This is mostly the case for import in the EU from Latin American countries, and to a lesser extent for EU import from African countries. Examples are bananas that arrive in Belgium and top fruit and citrus that enters the EU via the Netherlands, from where the products are sent to other EU countries. Bananas (2.74 million tonnes) were the most important product of the 18.4 million tonnes that was traded within the EU in 2016, followed by oranges (2.40 million tonnes), apples (2.17 million tonnes), tangerines (1.78 million tonnes), watermelons (1.33 million tonnes) and peaches (1.26 million tonnes). The export from the EU to countries outside of it is much smaller than internal trade, 3.6 million tonnes.

The export from Latin American countries (excluding Mexico) to the EU had a size of 8.76 million tonnes in 2016. Two-thirds of this (5.76 million tonnes) concerned bananas, followed at a distance by

pineapples (0.95 million tonnes), and at even more distance by lemons (0.33 million tonnes), melons (0.33 million tonnes), avocados (0.27 million tonnes) and mangoes (0.23 million tonnes) Of products that were traditionally often shipped to the EU from Latin America, such as apples, pears, grapes and oranges, the amounts stayed below the level of 200,000 tonnes.

From Latin America more went to the EU than to North America

The third trade flow in size is that from Latin America to North America (including Mexico). In 2016, that flow had a size of more than 8.5 million tonnes. The assortment that is shipped from Latin America to North America partially corresponds to trade to the EU. Bananas (5.0 million tonnes) and pineapples (1.15 million tonnes) are also the most important products in this flow, but these are followed by melons (0.66 million tonnes) and grapes (0.48 million tonnes). The assortment is small, because the three largest products combined are good for 80 per cent of the total trade flow from Latin America (excluding Mexico) to North America.

The Mexican fruit industry is incredibly dependent on the export to the US and Canada. In ten years, this trade doubled from 1.8 to 3.6 million tonnes. Watermelons, avocados and lemons are the major Mexican export products.

Southeast Asia is the growth market, but mostly for mutual trade

The largest absolute growth regarding global trade flows in fresh fruit is the mutual trade between countries in Southeast Asia. In ten years time, this has grown by 3.4 million tonnes to nearly 8 million tonnes. China might be the most important country in this region, but of the entire trade, China as a buyer 'only' accounts for one-third.

Bananas and apples are the two major products traded between Southeast Asian countries. The listing of remaining fresh fruit, which mostly consists of exotics, is the third largest with an amount of 730,000 tonnes in 2016. Durians are not included in this. Of this product, an amount of as much as 700,000 tonnes is traded between the countries in Southeast Asia mutually every year. This product is only sparsely traded in the rest of the world. Tangerines, grapes and pineapples are the other major products within the trade between Southeast Asian countries.

Trade of Africa to EU stable

The trade in fresh fruit from Africa to the EU has remained fairly stable in the past ten years. From 2006 to 2016, it regarded approximately two million tonnes every year, excluding bananas. Ten years ago, the export of fresh fruit (excluding bananas) from the African continent to EU countries was only half of the total. Now, the EU's share is about 40 per cent. The importance of export to countries in Southeast Asia has increased in particular, from 7 to 12 per cent, or in absolute figures from 330 to more than 600,000 tonnes. Besides, more fresh fruit was also shipped from the African continent to the Gulf states.

From Africa, mostly oranges, melons, grapes, pineapples and tangerines are also shipped to the EU.

Rapid growth of export in fresh fruit from Latin America to Southeast Asia

Next in size is the trade flow from Latin America to the former Soviet Republics. This mostly concerns bananas from Ecuador to Russia. This is followed by the trade between North America and countries in Southeast Asia. That trade flow has existed for a while now, and has 'only' grown about 20 per cent in ten years time. This concerns oranges for about a third.

Ten years ago, Latin American countries hardly exported fresh fruit to countries in Southeast Asia. Now, that figure is more than one million tonnes. Bananas are still by far the most important product, and many grapes and cherries are also shipped from Latin America to Southeast Asia.

Lien article : <https://www.freshfruitportal.com/news/2018/02/19/value-canadas-avocado-cherry-imports-soar-2017/>