



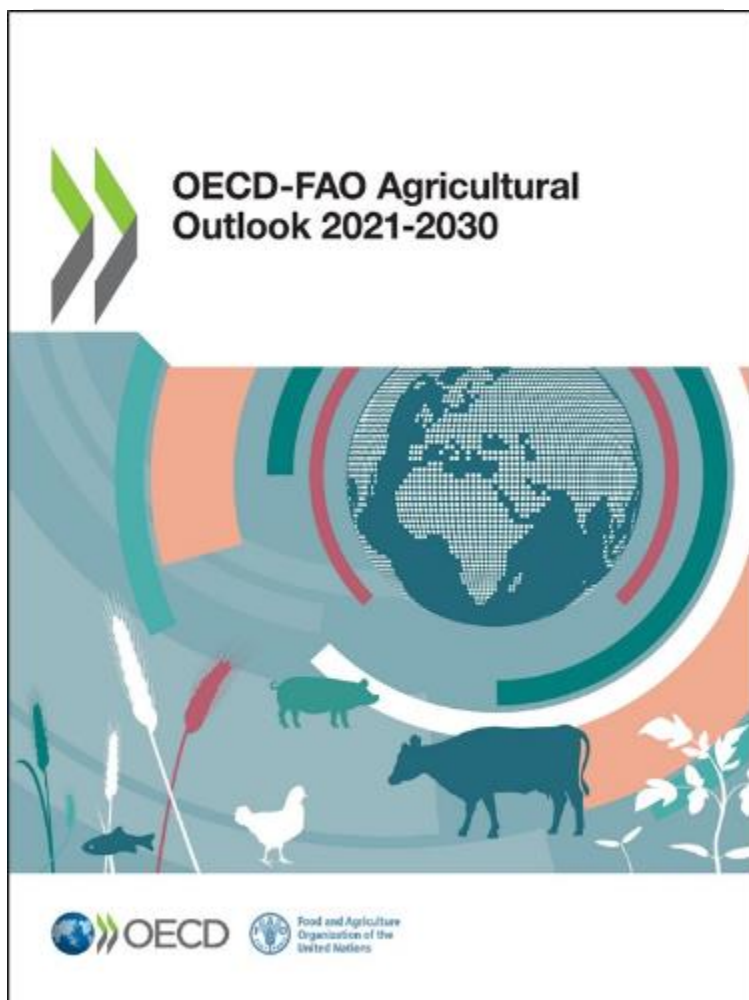
THE FRUITS AND VEGETABLES INDUSTRY SERIES

14 September 2021

Session N°1

Market trends and prospects of a dynamic sector





Global trends in trade and consumption: OECD

The Fruits and Vegetables industry: market trends and prospects of a dynamic sector

14 September 2021

Stephan Hubertus Gay



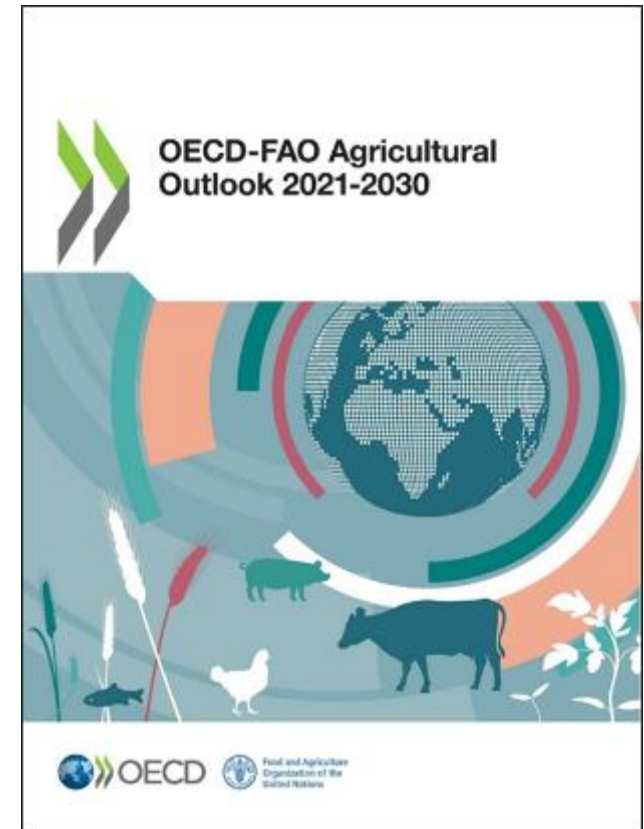
Structure of the presentation

1. Purpose of the OECD-FAO Agricultural Outlook
2. Highlights
3. Fruits and vegetables

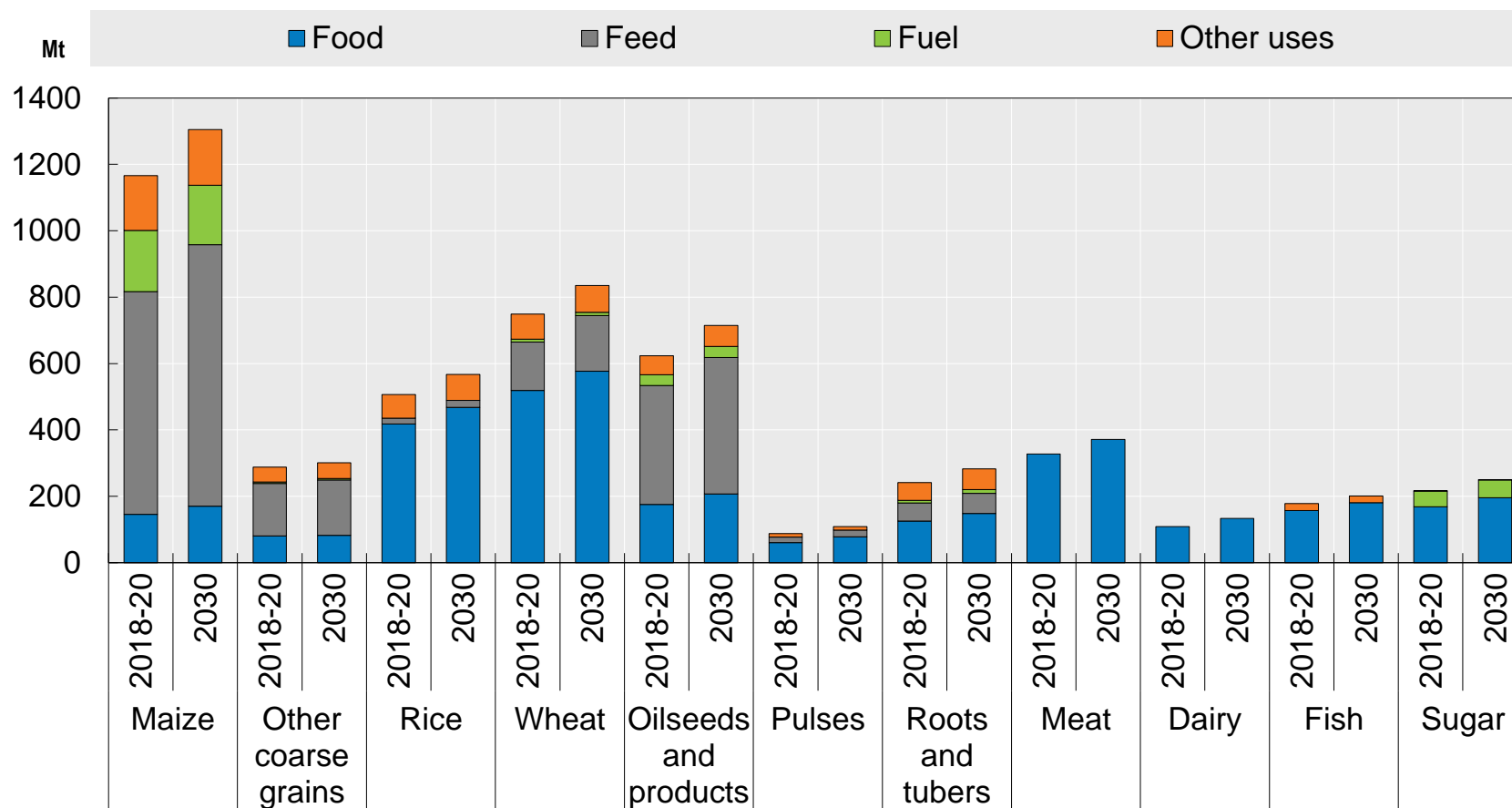


Purpose of the OECD-FAO Agricultural Outlook

- Not a forecast
 - Strict assumptions
 - 10 year horizon
 - Projections based on modelling and global expert input
 - Global coverage
 - Detailed chapters for all major commodities
- Understanding linkages
 - Closing of balances
 - Feed, Processing
- Policy planning & discussion
 - Scenarios
 - Impact assessment



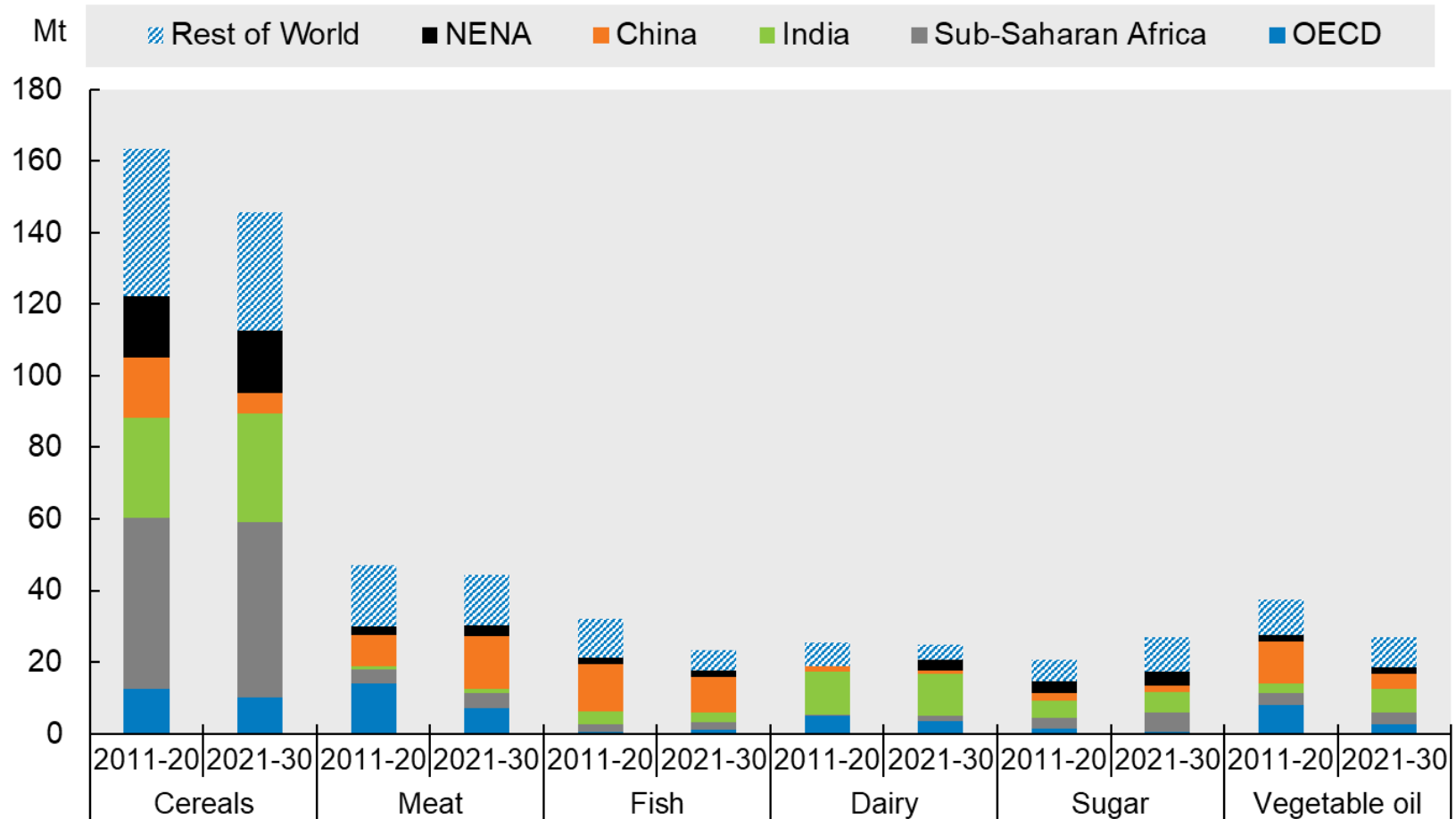
Global use of major commodities



Crushing of oilseeds is not reported as the uses of 'vegetable oil' and 'protein meal' are presented; Dairy refers to all dairy products in milk solids ; Sugar biofuel use refers to sugarcane and sugar beet, in sugar equivalent



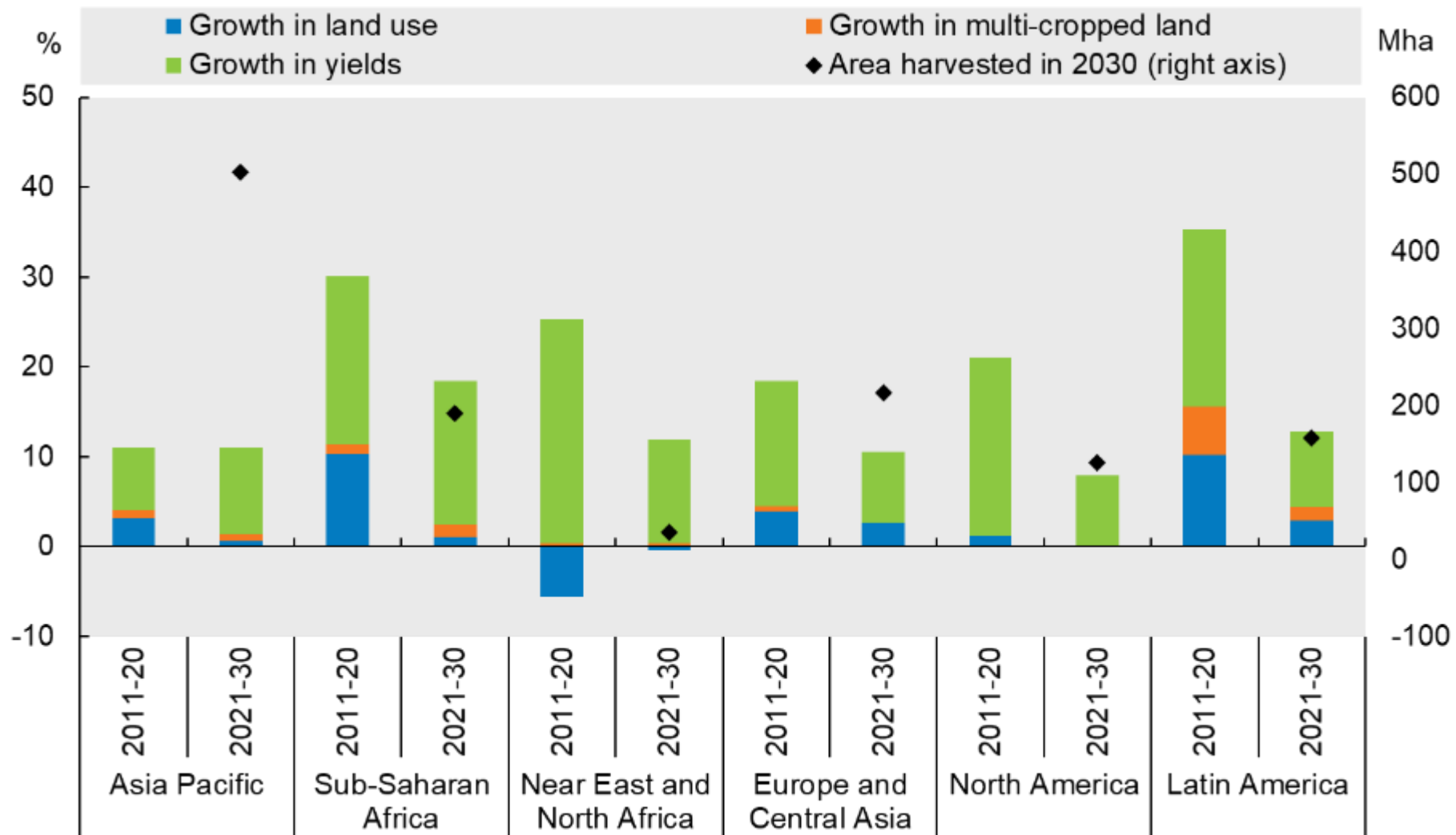
Low and middle-income countries drive food demand growth



Dairy is measured in milk solid

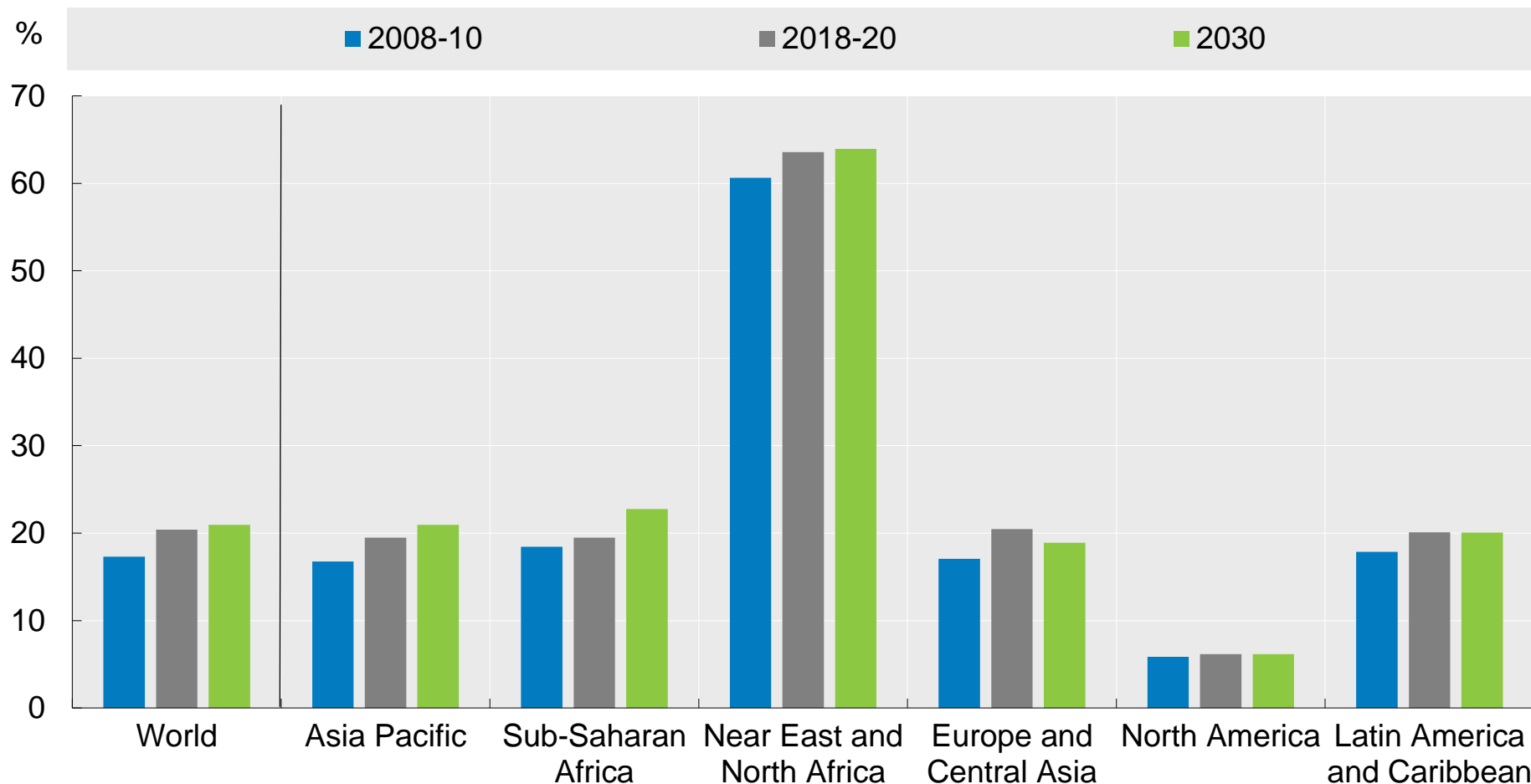


Growth in crop production driven by growth in yields

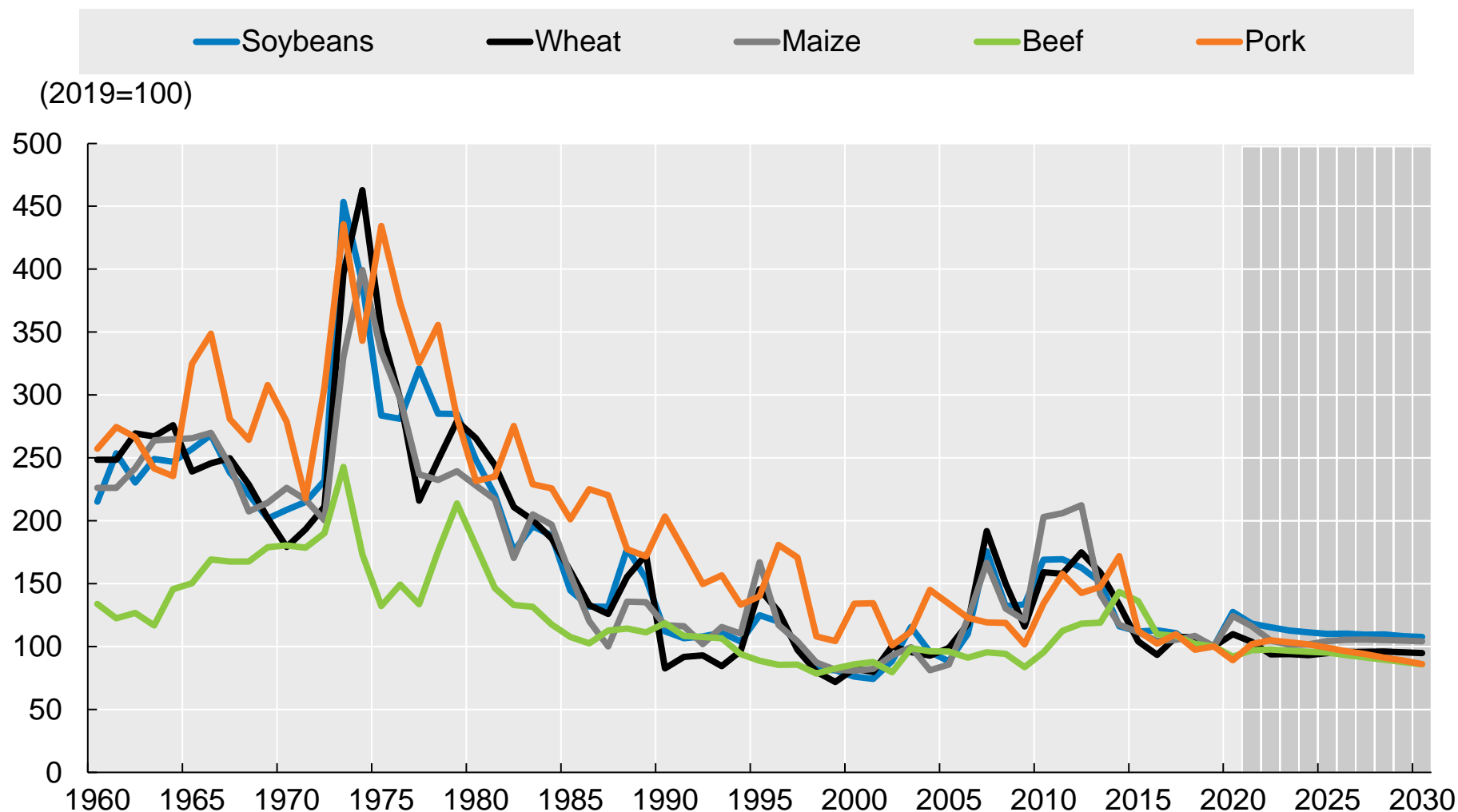


Trade is essential for global food security

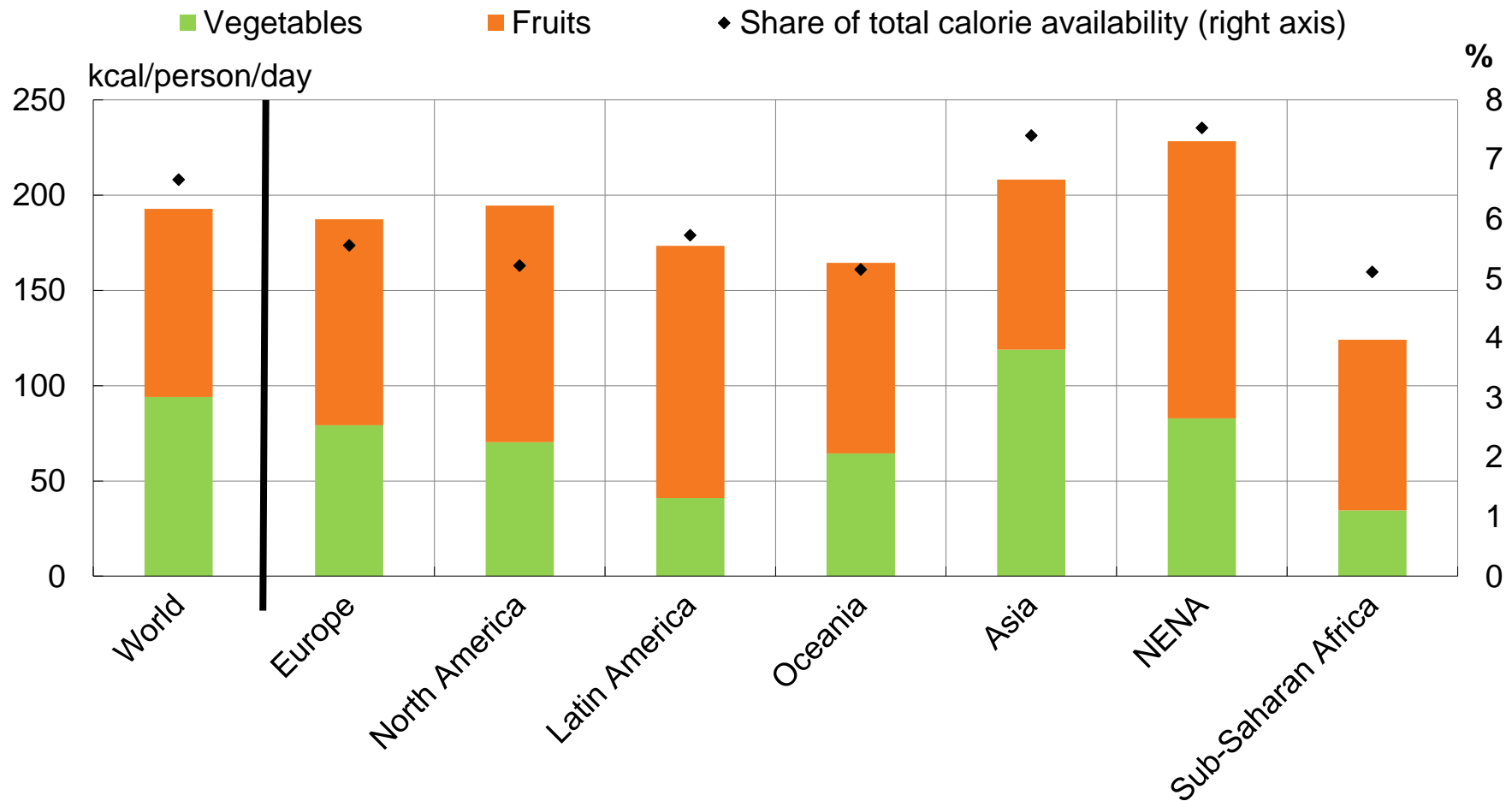
Imports as a share of total calorie availability



Continuing downward trend in real prices



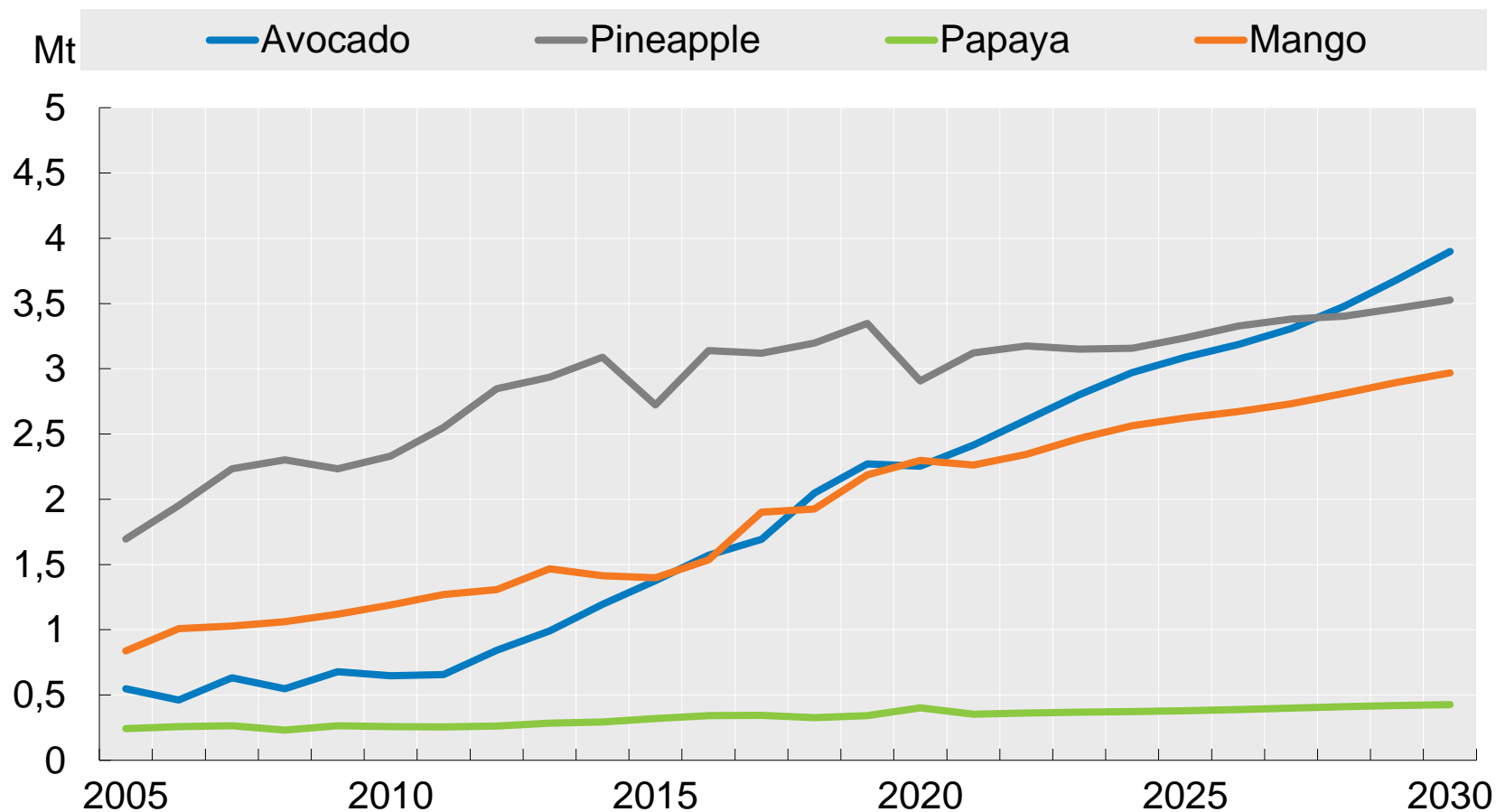
Per capita availability of fruits and vegetables in selected regions, 2016-18



Source: FAOSTAT Food Balances; Vegetables do not include roots and tubers and pulses.



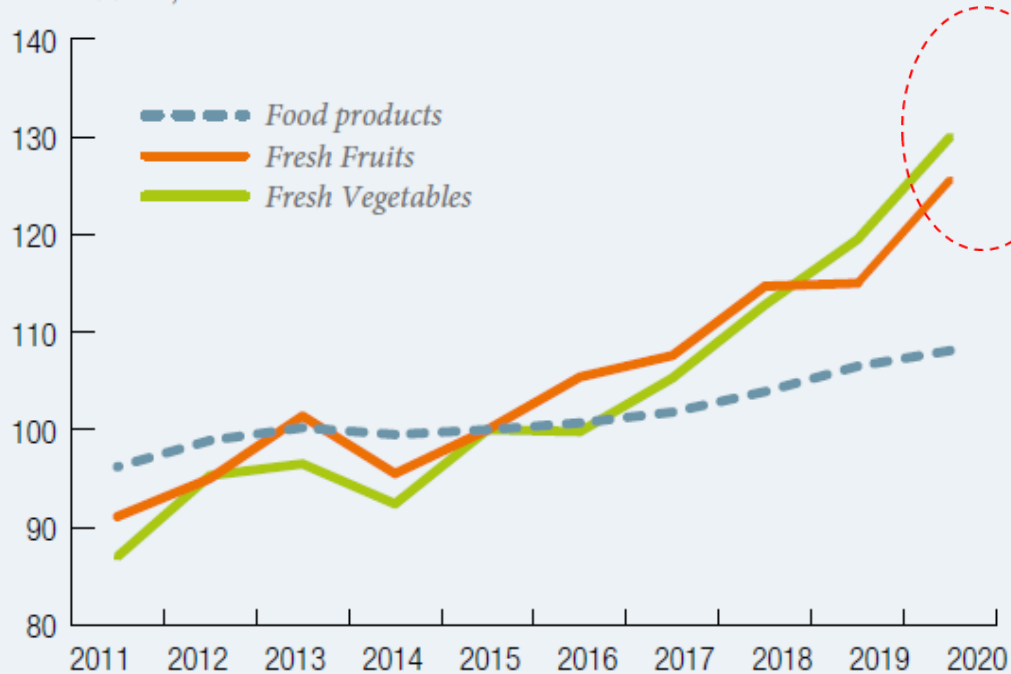
World major tropical fruit outlook: Global exports



Covid-19 impacts on fruit and vegetables

Price Trends (France) / source: INSEE

Annual, base 100 = 2015



- Movement restrictions
- Higher transport costs
- Lack of seasonal workers
- Boom of internet sales (temporary or permanent trend?)



Sources of the above photos: Kenya and Belgium- all rights reserved – legends available at the end of the presentation



Visit us at
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THE FRUITS AND VEGETABLES INDUSTRY SERIES



FRUIT AND VEGETABLES SCHEME



Thank you



This series of events is organised by the OECD Fruit and Vegetables Scheme and COLEACP. COLEACP operates within the framework of development cooperation between the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union (European Development Fund – EDF), with the support of the French Development Agency (AFD).