



THE FRUITS AND VEGETABLES INDUSTRY SERIES

14 September 2021

Session N°1

Market trends and prospects of a dynamic sector



INTERNATIONAL YEAR OF
FRUITS AND VEGETABLES
2021



FRUIT AND VEGETABLES SCHEME



EU MARKET & OPPORTUNITIES FOR ACP FRUIT AND VEGETABLES

Presentation of the main results

MARCHÉ DE L'UE & OPPORTUNITÉS POUR LES FRUITS ET LÉGUMES ACP

Présentation des principaux résultats

14 09 2021



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MAIN
TRENDS

PRINCIPALES
TENDANCES

OPPORTUNITIES

EU market opportunities

- Increased consumption of fruit and vegetables
- Increase in imports of fruit and vegetables of ACP origin
- Supply of some fruit and vegetables does not meet demand
- Popularity of fresh produce among European consumers
- Popularity of exotic produce, especially among young people
- Organic food is the driving force behind the qualitative and quantitative growth of the agri-food market; fruit and vegetables are drivers of the organic market
- Fruit and vegetables are an important selling point for shops and online platforms
- Online platforms help popularise fruit and vegetable consumption
- Sustainable packaging innovations are a new marketing focus
- Rising import prices

OPPORTUNITES

Opportunités sur le marché de l'UE

- Augmentation de la consommation de fruits et légumes
- Augmentation des importations de fruits et légumes d'origine ACP
- Offre de certains fruits et légumes inférieure à la demande
- Popularité des produits frais auprès des consommateurs européens
- Popularité des saveurs exotiques, surtout chez les jeunes
- Le bio, locomotive de la croissance qualitative et quantitative du marché agroalimentaire. Les fruits et légumes : locomotive du marché bio.
- Les fruits et légumes sont un important argument commercial pour les magasins et les plateformes en ligne
- Les plateformes en ligne contribuent à populariser la consommation de fruits et légumes
- Les innovations en matière de packaging durable constituent un nouvel argument marketing
- Augmentation des prix à l'importation

THREATS

EU market threats

- Ultra-competitiveness of competing ACP fruit and vegetable producers
- High requirements to enter the European market and continuous development of these requirements (public norms and standards)
- Specific requirements for sustainable packaging and therefore innovation
- The rise of locavorism
- Civil society pressure to reduce the carbon footprint due to its contribution to global warming

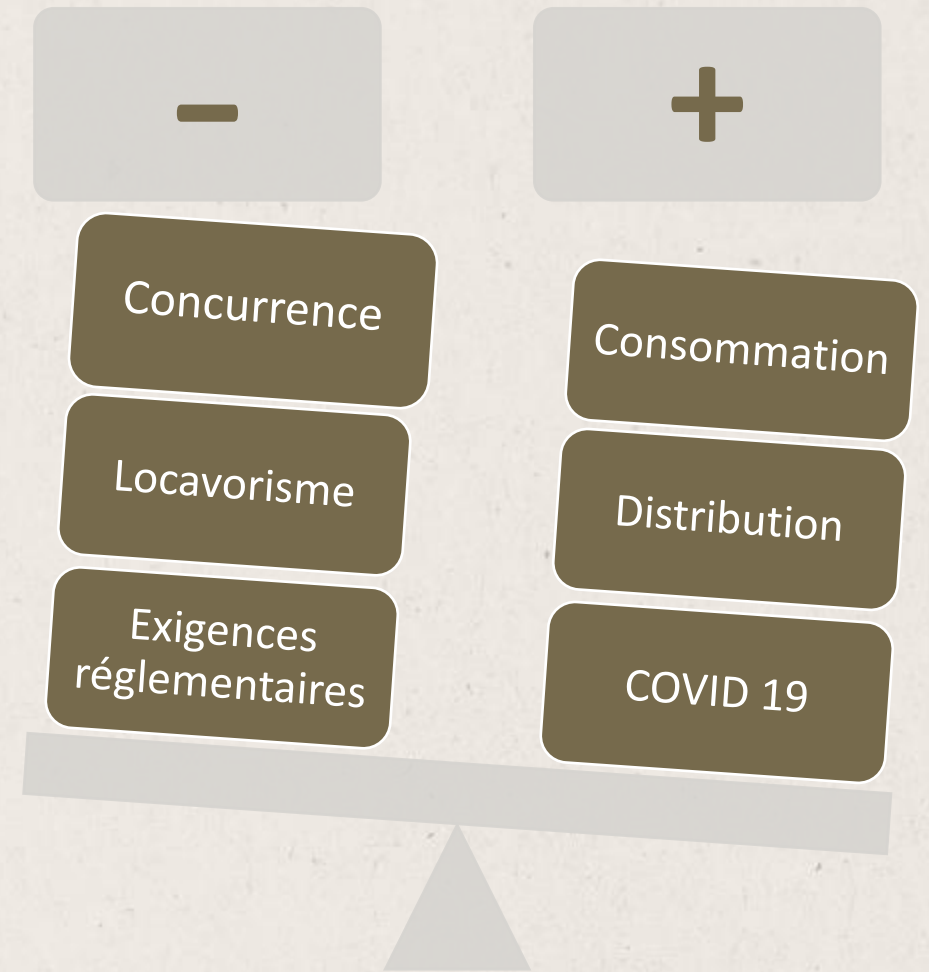
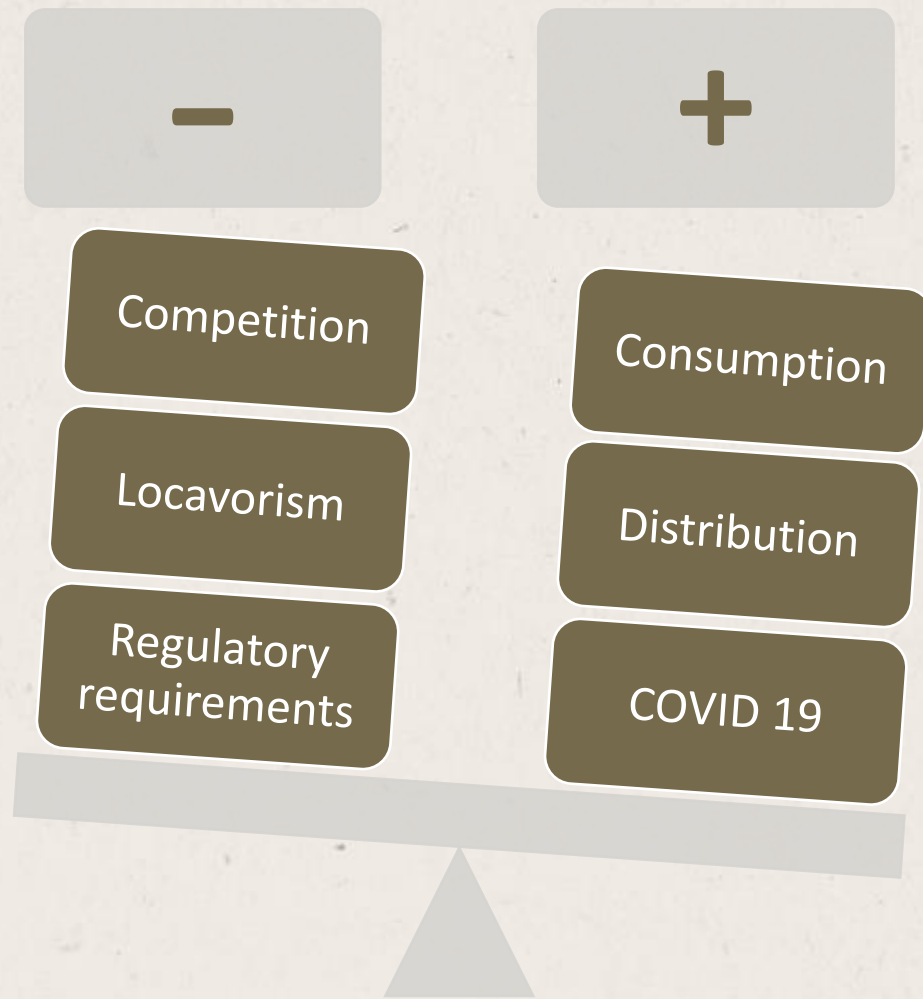
MENACES

Menaces sur le marché de l'UE

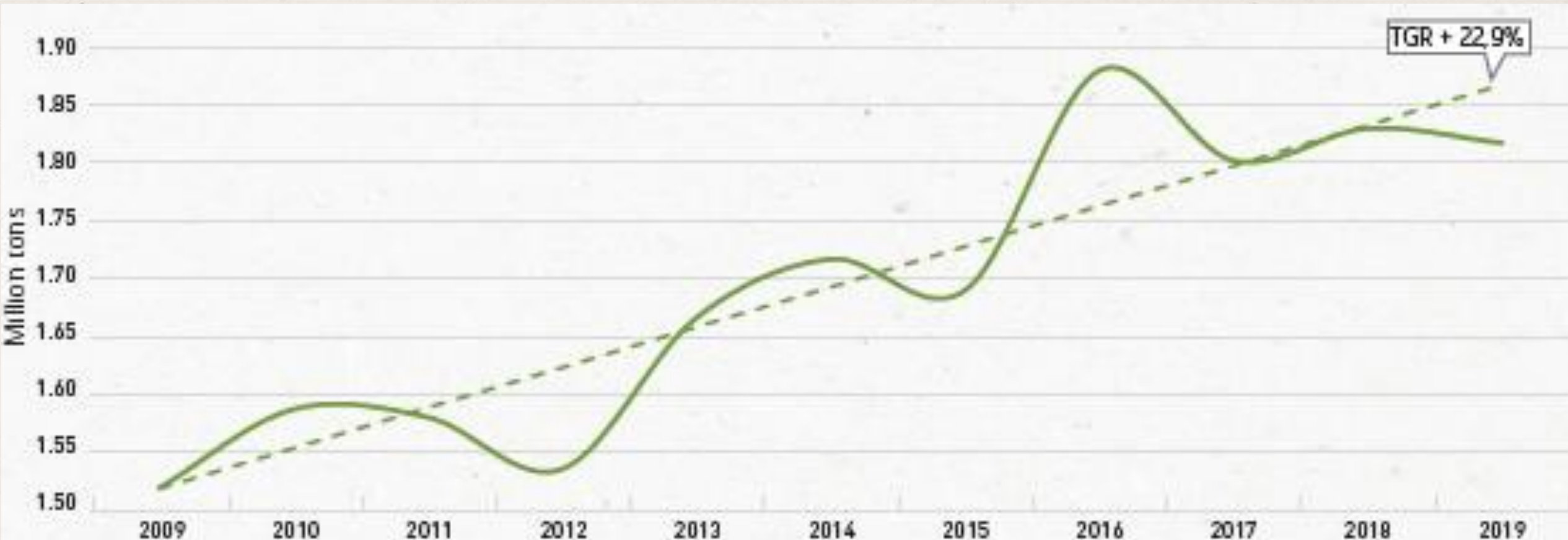
- Ultra-compétitivité des producteurs de fruits et légumes concurrents des ACP
- Exigences élevées pour pénétrer le marché européen et évolution permanente de ces exigences (normes publiques et standards)
- Exigences spécifiques en matière d'emballage durable et donc d'innovation
- Montée en puissance du « locavorisme »
- Pression de la société civile sur l'empreinte carbone due à sa contribution au réchauffement du climat.

MAIN EU MARKET FORCES

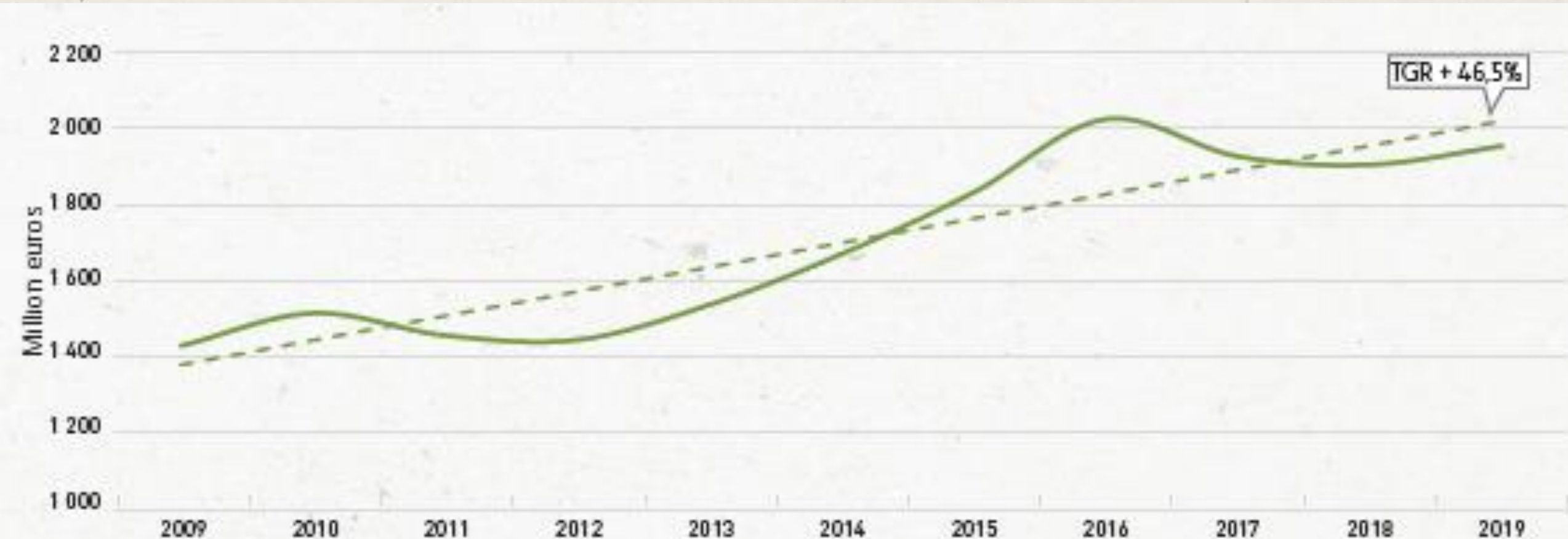
FORCES DU MARCHÉ DE L'UE



VOLUME



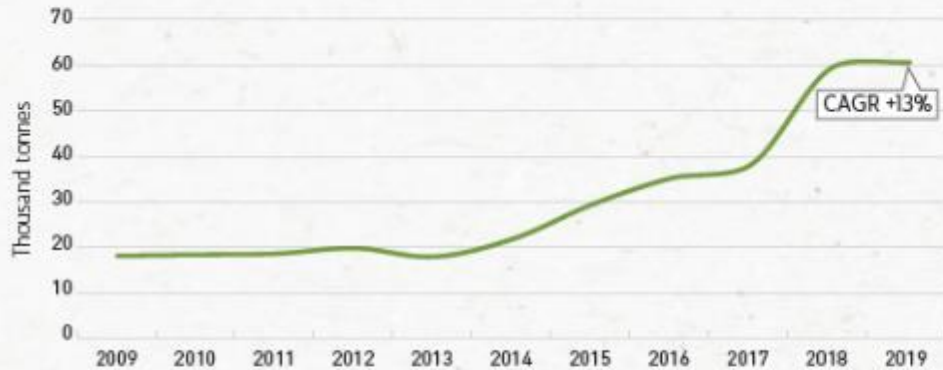
VALUE



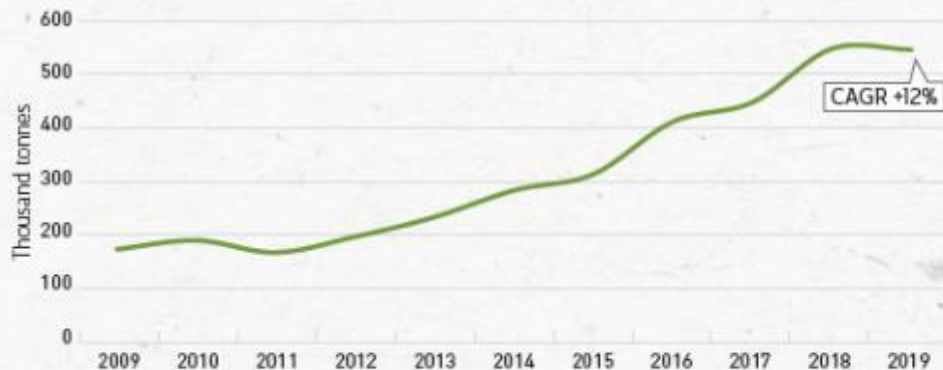
EXAMPLE OF AVOCADO

L'EXEMPLE DE L'AVOCAT

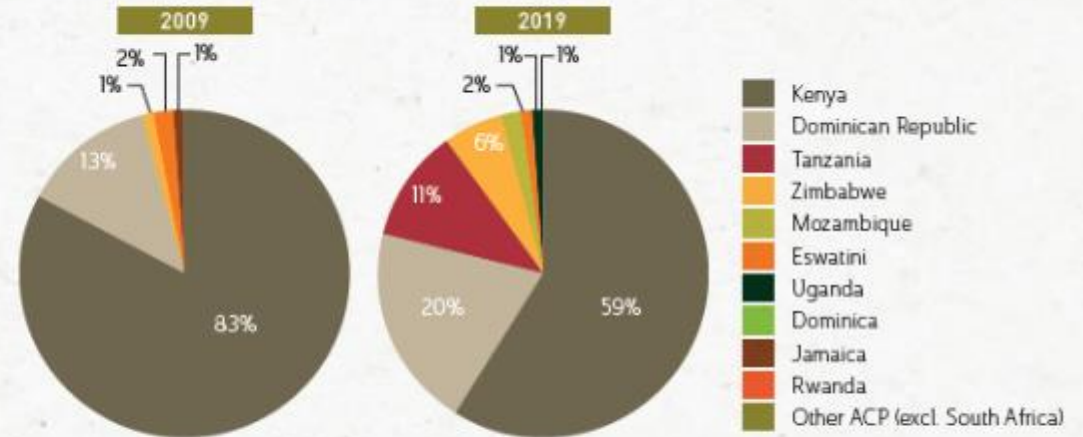
Evolution of European avocado imports from ACP countries (excluding South Africa), in tonnes. CAGR between 2009 and 2019 (Source: COLEACP from Eurostat)



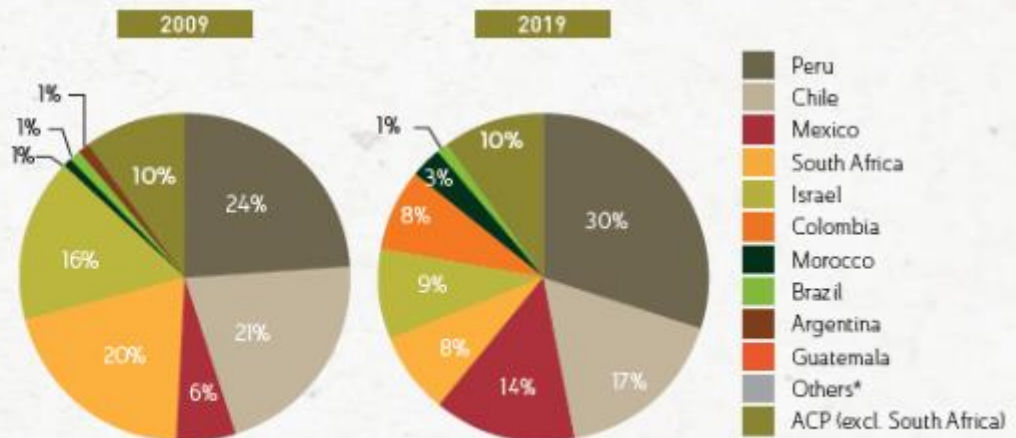
Evolution of European avocado imports from the rest of the world (excluding ACP countries, except South Africa), in tonnes. CAGR between 2009 and 2019 (Source: COLEACP from Eurostat)



Share of exporting countries in EU28 imports of avocados of ACP origin, in tonnes, in 2009 (total: 18,188 tonnes) and 2019 (total: 60,647 tonnes), excluding South Africa (Source: COLEACP from Eurostat)



Share of rest of the world and ACP exporting countries (in bold, excluding South Africa) in EU28 avocado imports, in tonnes, in 2009 (total: 191,626 tonnes) and 2019 (total: 606,690 tonnes). Others* = rest of the world, excluding ACP countries (except South Africa) (Source: COLEACP from Eurostat)



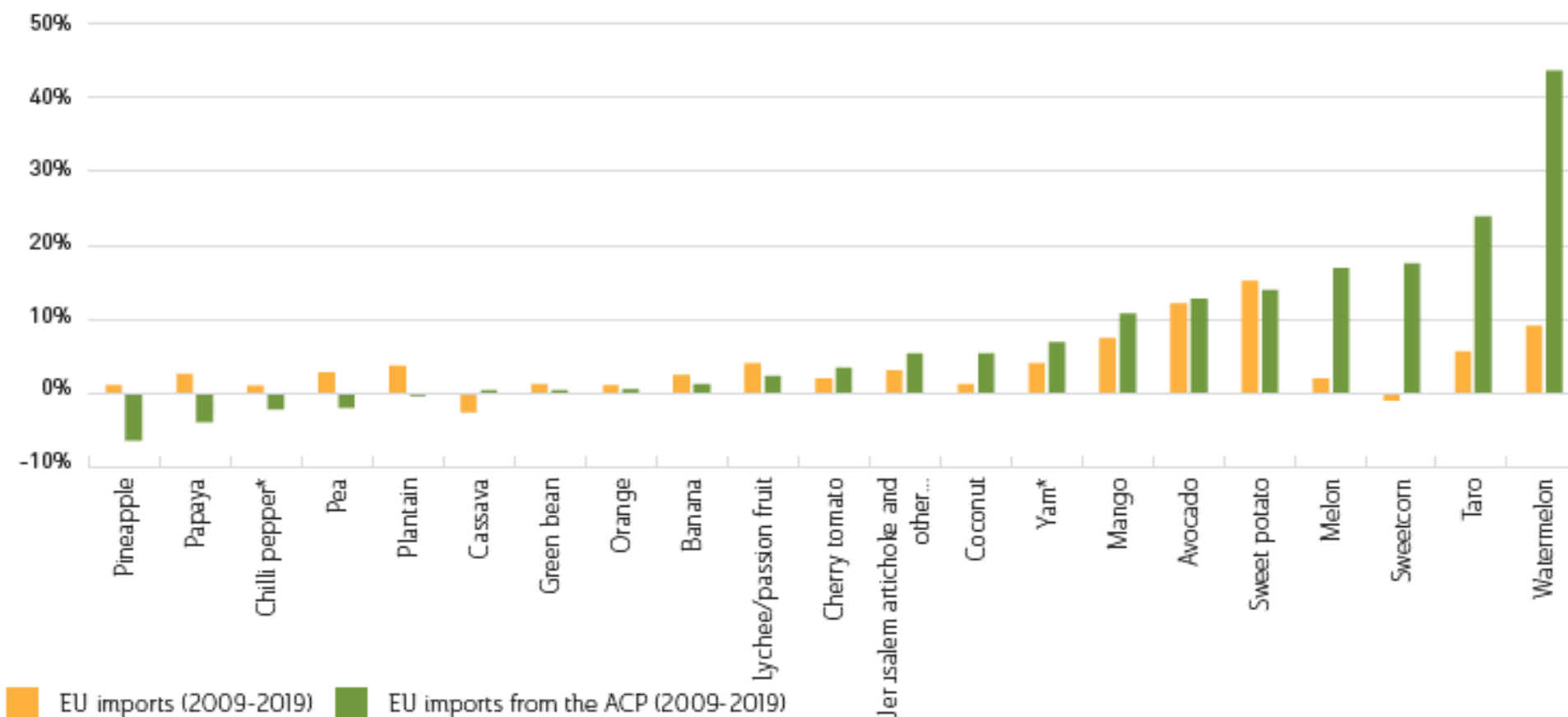
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TRENDS
BY VALUE
CHAIN

TENDANCES
PAR CHAÎNE
DE VALEUR

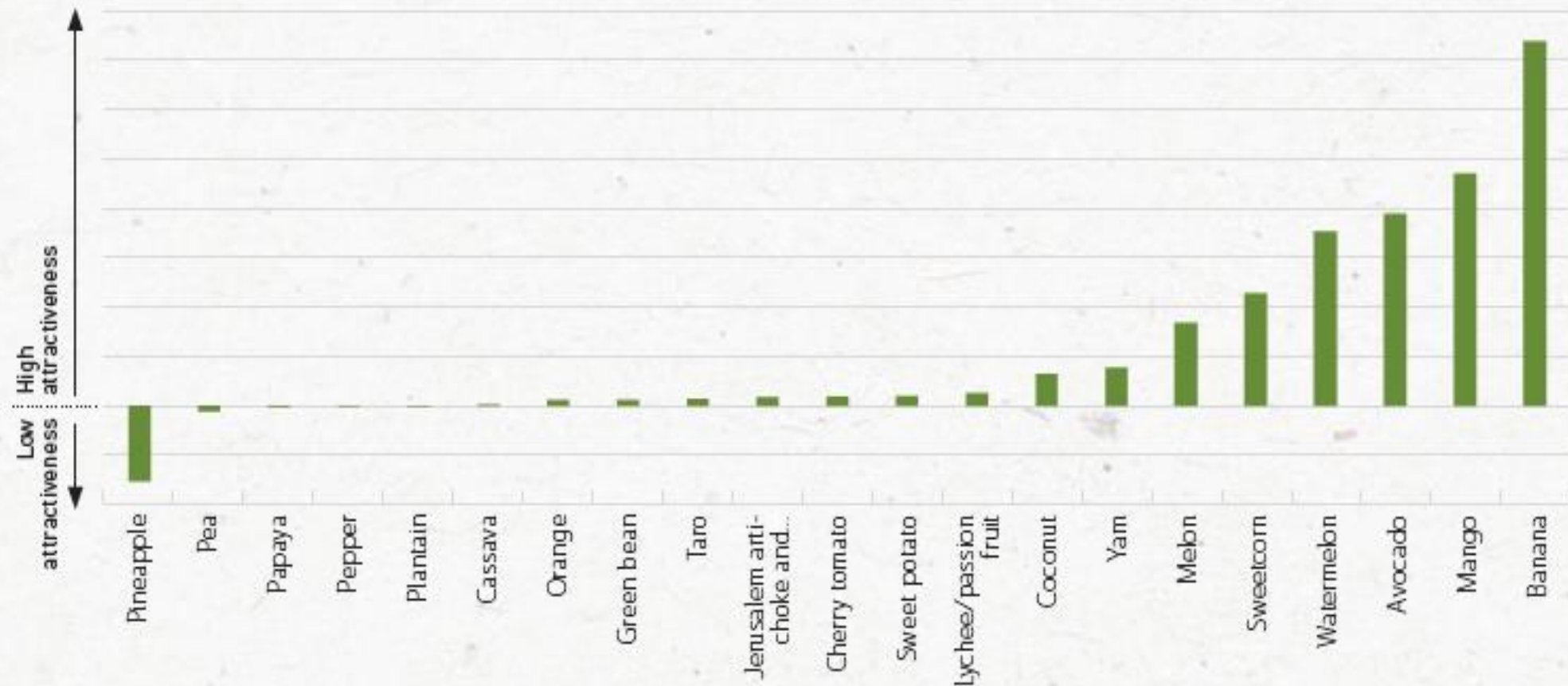
Taux de croissance annuels comparés (Importations F&L UE – Importations provenant des ACP)

Evolution of European imports (total and ACP) of fruit and vegetables in the period 2009–19 (annual growth rates). * For these products, the period covered is 2012–19. (Source: COLEACP from Eurostat)



Taux de croissance annuels ramenés à la taille du segment de marché

Theoretical attractiveness of the EU market for imported fruit and vegetables from the ACP. Based on the CAGR between 2009 and 2019 of imports from the ACP. Volume of imports from the ACP in 2019. (Source: COLEACP from Eurostat)



EU market segments for ACP F & V

Segments de marché pour les F & L ACP

Level 1: Major developing European market segments

- Hass avocado
- Banana (organic)
- Yam*
- Lime
- Sweetcorn
- Mango (Amélie, Keitt, Kent)
- Cassava*
- Melon
- Papaya
- Coconut
- Watermelon
- Sweet potato
- Chilli
- Pea
- Taro*
- Cherry tomato
- Jerusalem artichoke*

Level 3: Major stable or mature European market segments

- Pineapple (MD2)
- Banana
- Plantain*
- Green bean
- Lychee
- Orange

Niveau 1 : Principaux segments de marché européens en développement

- Avocat Hass
- Banane (bio)
- Igname*
- Lime
- Maïs doux,
- Mangue (Amélie, Keitt Kent)
- Manioc*
- Melon
- Papaye
- Noix de coco
- Pastèque
- Patate douce
- Piment
- Pois
- Taro*
- Tomate cerise
- Topinambour*

Niveau 3 : Principaux segments de marché européens stables ou à maturité

- Ananas MD2
- Banane
- Banane plantain*
- Haricot vert
- Litchi
- Orange

Level 2: Niches with high development potential

- Pineapple (Sugarloaf, Smooth Cayenne)
- Greenskin avocado
- Exotic berries
- Snow peas

Niveau 2 : Niches à fort potentiel de développement

- Ananas Pain de sucre et Smooth cayenne*
- Avocat Greenskin*
- Petits fruits exotiques
- Pois mange-tout

CONCLUSION

The European market is demanding, evolving, highly competitive but the European market remains attractive in particular for ACP fruit and vegetables.

Le marché européen est exigeant, évolutif, hautement compétitif mais le marché européen reste attractif en particulier pour les fruits et légumes ACP.



This market study has been achieved by the
COLEACP Market Intelligence department.



Cette étude de marché a été réalisée par le *service Informations sur les marchés* du COLEACP



More information?

Please do not hesitate to contact me

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Plus d'informations?

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THANK YOU

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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).