

Exotic fruit – a highlight at POS

Consumption and trends



Freshfel Europe

Fruit Logistica

Berlin, 5 February 2015

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About Freshfel Europe

- European association
 - Voice for the sector in EU lobbying representing fresh fruit and vegetable sector, based in Brussels
 - Platform for the EU sector
 - Valuable source of information on business and regulatory development
- Large, diversified and representative membership:
 - Associations and Companies
 - Across the supply chain (production, import, wholesale and export trade, logistic and retail)
 - Many associated members also from around the world
- About our Mission: Stimulate consumption of fresh fruit & vegetables
 - Improve the efficiency and competitiveness of the sector
 - Facilitate international fresh produce trade
 - Assist the sector to comply with the highest safety rules
 - Provide a favourable environment to promote the benefits of fresh produce
 - Lobby of the sector

More information and the latest activity report at: www.freshfel.org



Exotic fruits

- Exotics are something different for everyone, making a definition difficult
- For the purpose of this presentation:
 - Avocados
 - Guavas, mango & mangosteen
 - Papaya
 - Pineapple
 - Persimmons
 - Durians
 - If possible also including: Tamarinds, cashew apples, jackfruit, lychees, sapodillo plums, passion fruit, carambola, pitahaya, and others
- Kiwifruit often considered exotic, but has become quite mainstream.
- Similar evolution happening with avocado, but not as mainstream yet.
- *Note: Categories might vary, depending on the data available.*

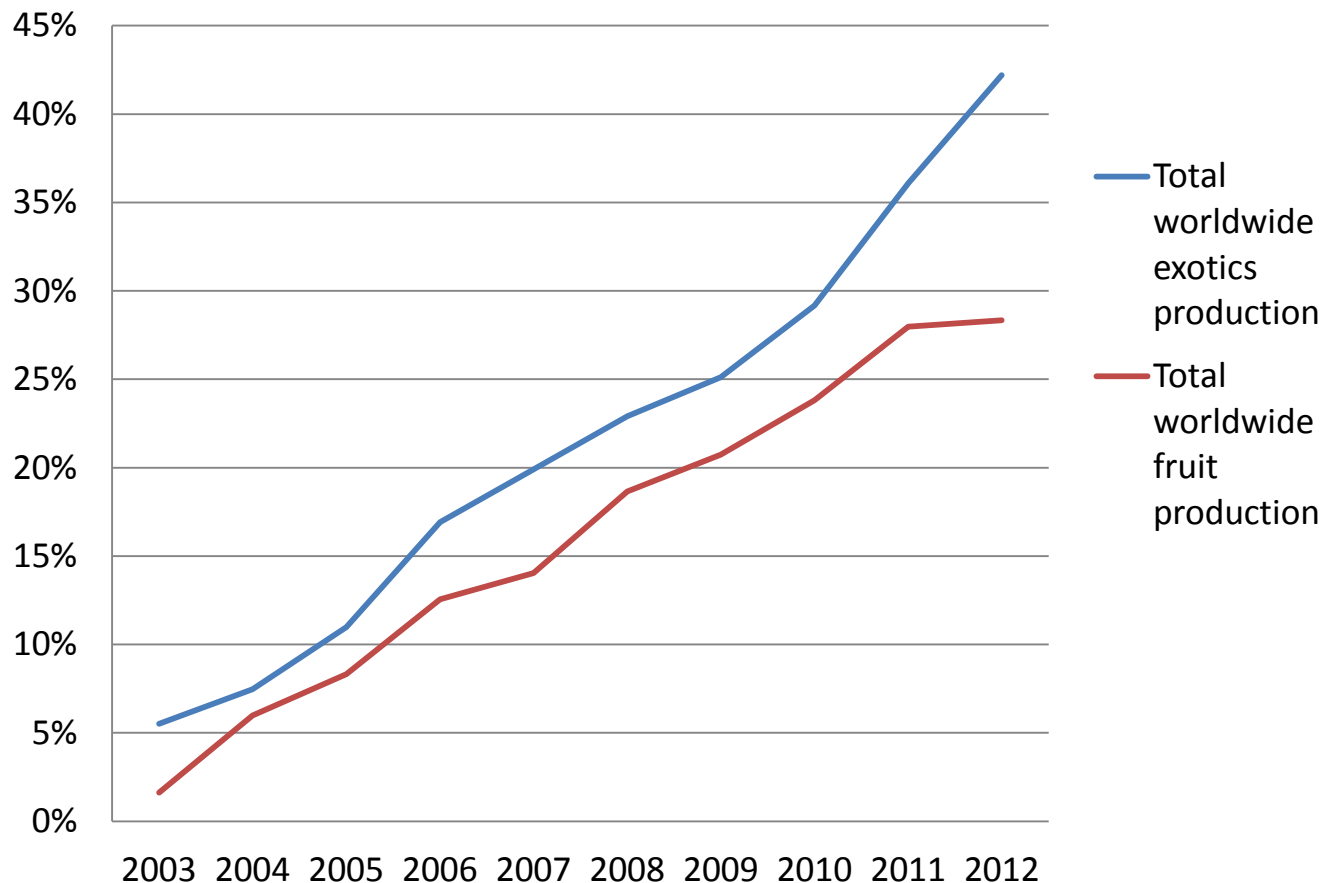


Production trends



World production trends

Growth in fruit and exotics production (volume in T)



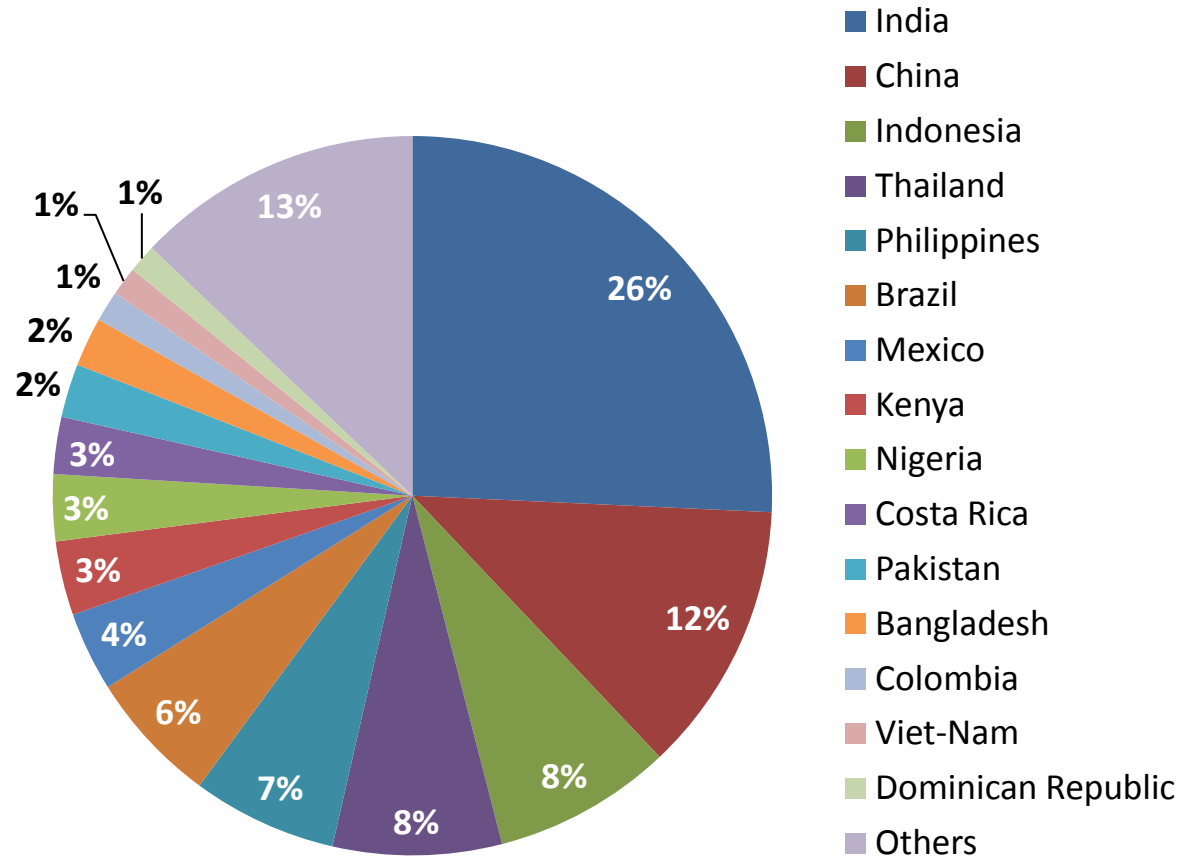
Worldwide production of exotics has risen with **48%** in the last ten years.

Worldwide production of total fruits rose with **28%**.



Worldwide production

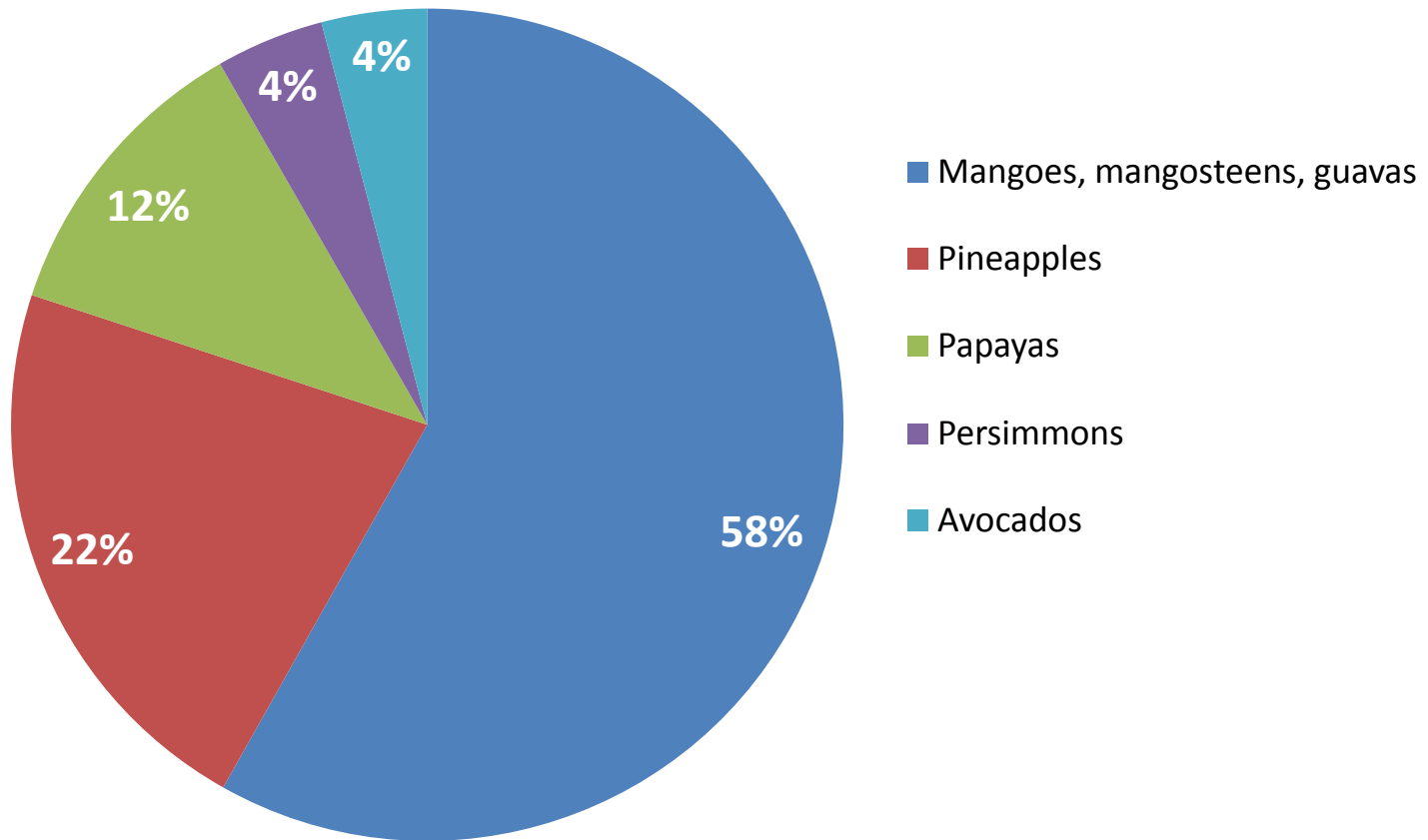
Top 15 worldwide producers overall*	
India	26.249.390
China	12.450.458
Indonesia	8.211.028
Thailand	7.740.347
Philippines	6.645.674
Brazil	6.105.947
Mexico	3.630.308
Kenya	3.401.511
Nigeria	3.055.000
Costa Rica	2.616.097
Pakistan	2.454.965
Bangladesh	2.250.642
Colombia	1.413.153
Viet-Nam	1.315.942
Dominican Republic	1.305.931
Total worldwide	102.012.468



* Only for mango/guava, pineapples, papaya, avocado and persimmons

Worldwide production

Differences between commodities produced (2012)



Worldwide production

Top 10 avocado producers

Mexico	1.316.104
Indonesia	294.200
Dominican Rep.	290.011
United States	245.000
Colombia	219.352
Peru	215.000
Kenya	186.292
Chile	160.000
Brazil	159.903
Rwanda	145.000
Total	4.356.322

Top 10 persimmons producers

China	3.386.000
Rep. of Korea	401.049
Japan	253.800
Brazil	158.241
Azerbaijan	140.082
Spain	152.000
Italy	47.000
Uzbekistan	42.500
Israel	31.292
Nepal	2.806
Total	4.468.955

Top 10 pineapple producers

Thailand	2.650.000
Costa Rica	2.484.729
Brazil	2.478.178
Philippines	2.397.628
Indonesia	1.780.889
India	1.456.000
Nigeria	1.420.000
China	1.392.211
Mexico	759.976
Colombia	551.133
Total	23.288.499

Top 10 mango, mangosteen, guavas producers

India	19.633.000
China	7.418.247
Indonesia	5.523.827
Thailand	4.875.347
Philippines	4.083.225
Kenya	2.817.670
Pakistan	2.446.965
Mexico	2.157.171
Brazil	1.951.832
Bangladesh	1.950.059
Total	61.856.148

Top 10 papaya producers

India	5.160.390
Brazil	1.517.696
Indonesia	906.312
Dominican Rep.	815.499
Nigeria	775.000
Mexico	712.917
China	254.000
Dem. Rep. Congo	230.000
Thailand	215.000
Guatemala	206.500
Total	12.398.866

Major differences between commodities and the biggest producers!



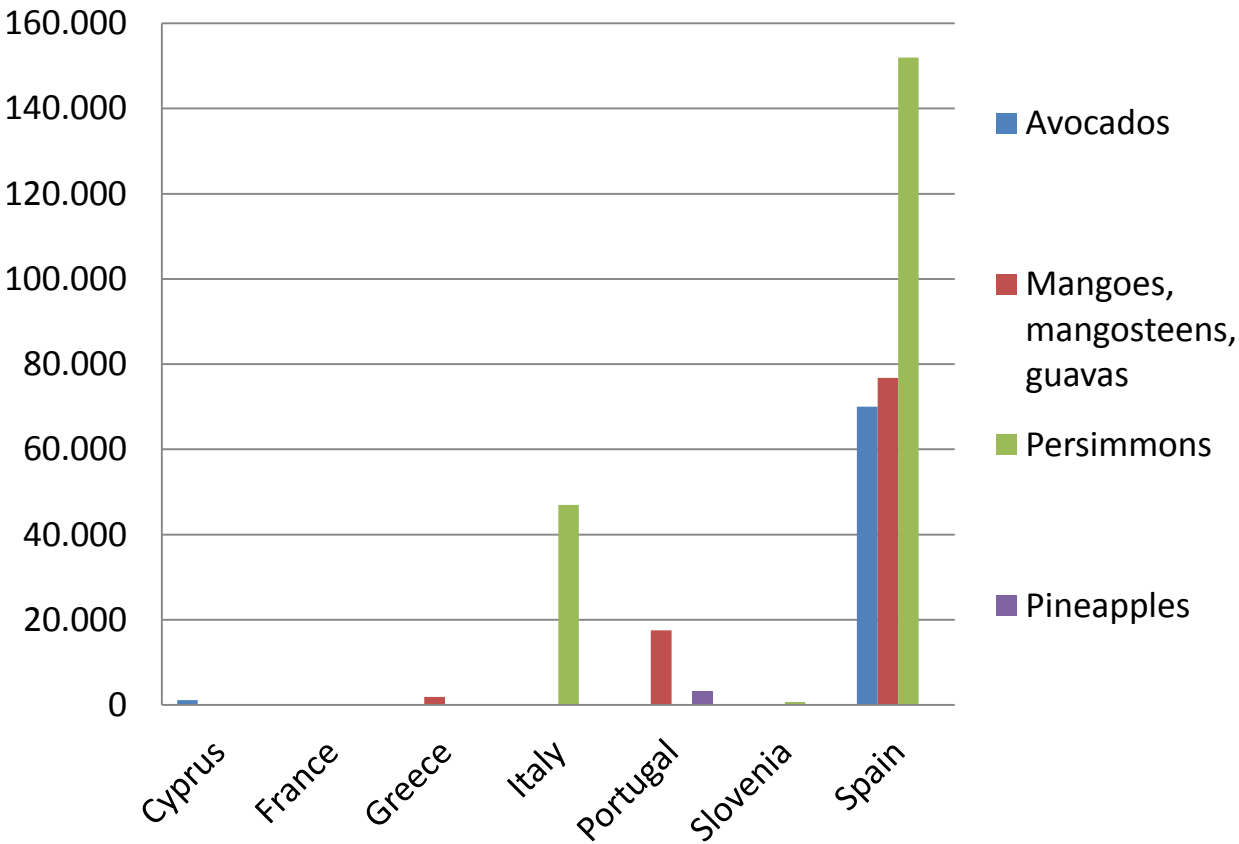
World production trends

Production increases between 2002 and 2012 clearly show growing interest for exotic fruit, in all categories

- Avocados
 - 2002 – 2012: increase of 48%
 - 2007 – 2012: increase of 19%
- Papayas
 - 2002 – 2012: increase of 47%
 - 2007 – 2012: increase of 28%
- Permissons
 - 2002 – 2012: increase of 67%
 - 2007 – 2012: increase of 22%
- Mango, Mangosteen and Guavas
 - 2002 – 2012: increase of 48%
 - 2007 – 2012: increase of 18%
- Pineapples
 - 2002 – 2012: increase of 47%
 - 2007 – 2012: increase of 17%

EU production

EU production 2012 in exotics



EU production is limited, but EU demand is high.

EU is still one of the main importers of exotic fruits worldwide, together with the United States.



Trade trends



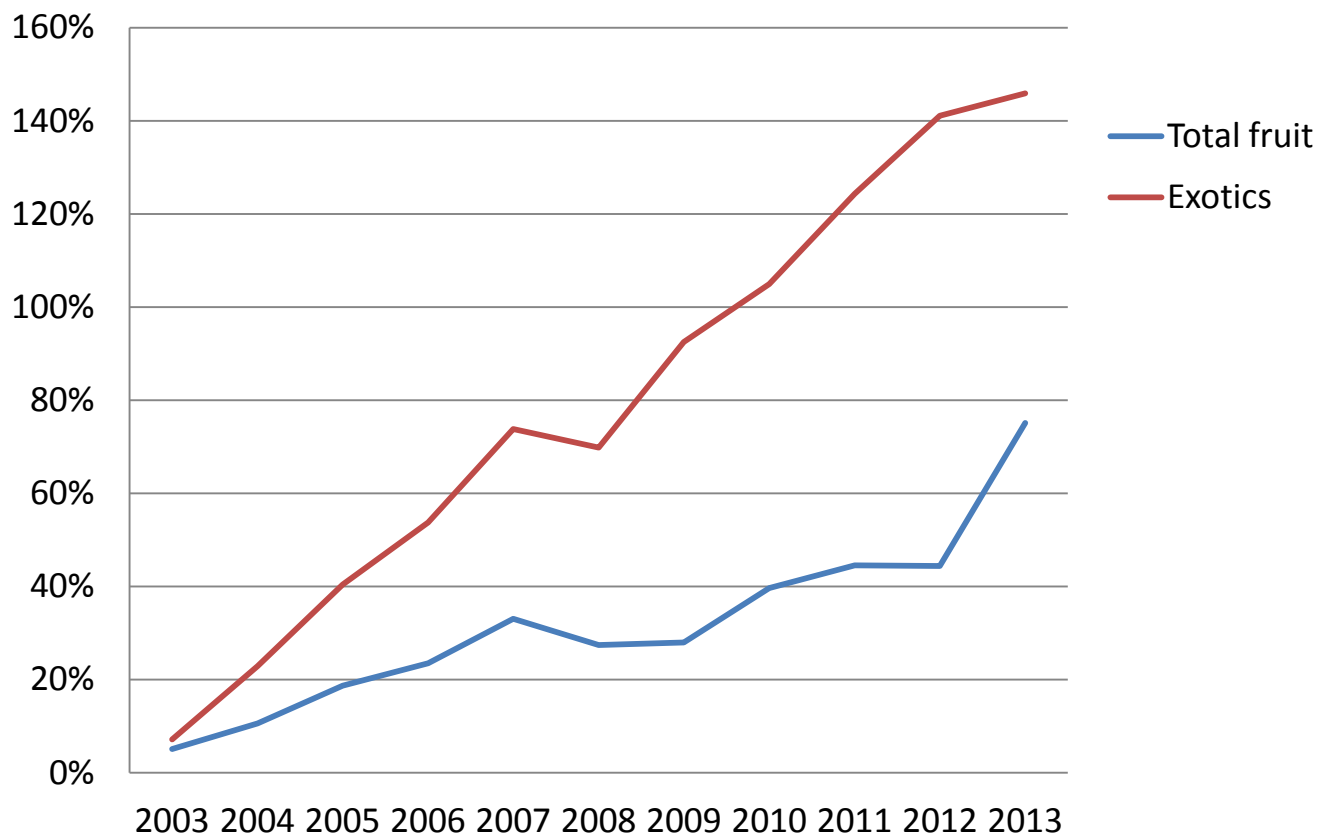
World trade

- Total worldwide exotic trade accounts for:
 - A volume of approx. **8.7 million T**
 - With an approx. value of **10.4 billion EUR**
- The US imports **2.2 million T**
- The EU imports **1.5 million T**



World trade

Worldwide trade increase 2003-2013



Worldwide imports show an increase of exotic fruit trade of 146% compared to 2002.

For total fruit trade, this was only half, 75%, in 2013.





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World exports

Worldwide largest producers of exotics (in 2012, volume in t)	
India	26.249.390
China	12.560.458
Indonesia	8.505.228
Thailand	7.740.347
Philippines	6.666.567
Brazil	6.265.850
Mexico	4.946.412
Kenya	3.587.803
Nigeria	3.055.000
Costa Rica	2.643.097

Worldwide largest exporters in exotics (in 2013, volume in t)	
Costa Rica	1.973.376
Mexico	1.100.351
Thailand	1.093.613
Spain	559.001
Philippines	495.495
Netherlands	450.174
India	338.761
Peru	247.638
United States	243.333
Belgium	199.314

Worldwide largest receivers of exotics (in 2013, volume in t)	
United States	2.217.082
EU (top in EU are NL, Germany, UK, France, Italy and Spain)	1.425.775
China	544.772
Canada	301.262
Hong Kong	299.209
Viet-Nam	287.238
Japan	280.195
Russia	270.116

Production is roughly 102 million T and trade is only 8.7 million T

Also: clear difference between the top producers and the top exporters



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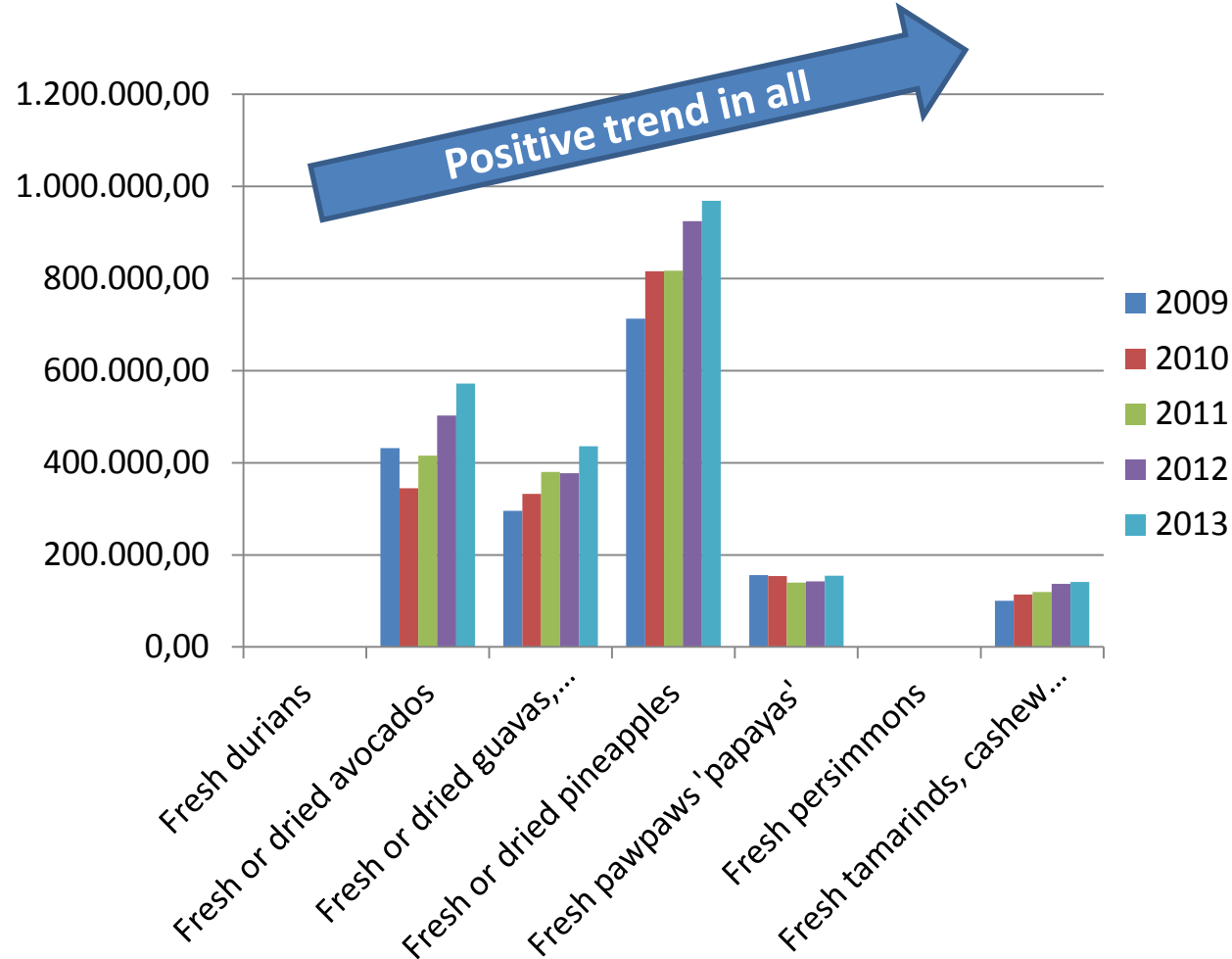
US imports

US imports of exotics 2013 (volume in t)

Costa Rica	993.782
Mexico	928.238
Sub total	1.922.020
Others	295.062
Total	2.217.082

United States is the first importer of exotic fruits. The US are for 87% depending on the imports from only Costa Rica and Mexico (2013).

US imports 2009-2013 (volume in t)



EU imports

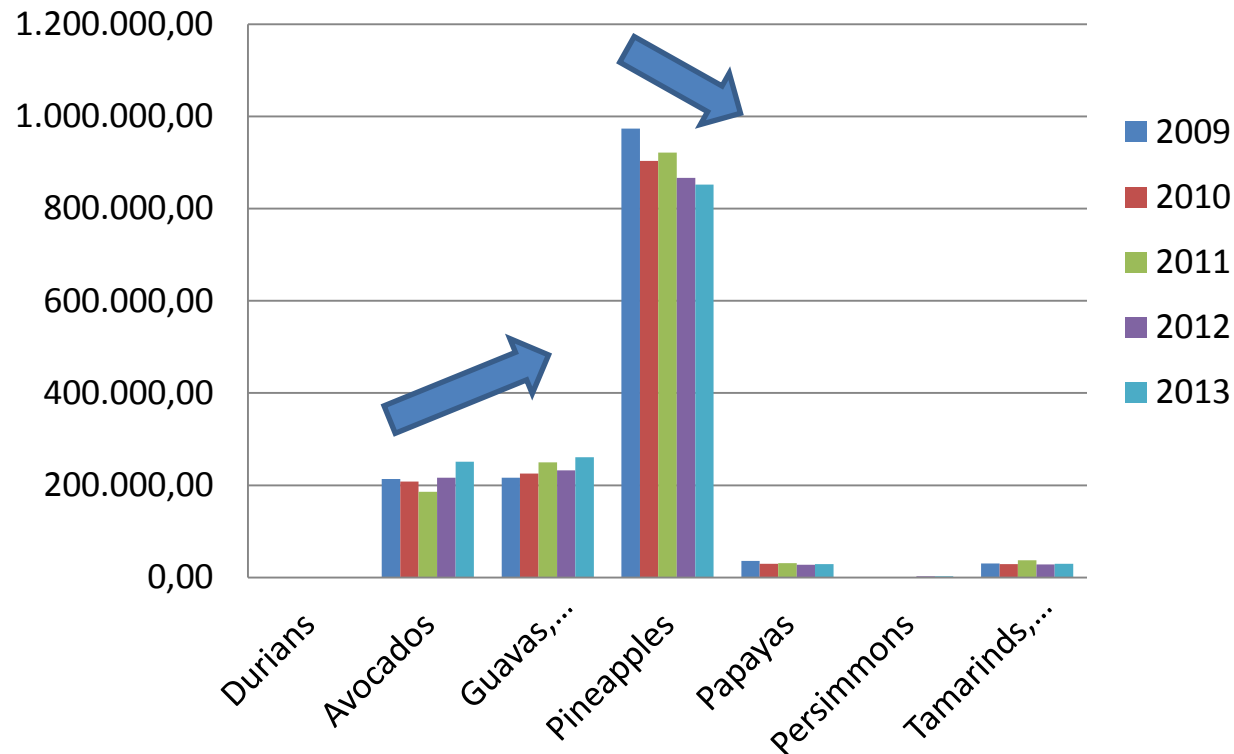
On average the EU has decreased imports by 8% between 2009-2013 by the EU.

Compared to the US, in the EU only avocados and guavas/mangos are on the rise.

Difference 2009-2013

Durians	- 52%
Avocados	18%
Guavas, Mango, etc.	20%
Pineapples	- 12%
Papayas	- 20%
Persimmons	- 7%
Rest exotics	- 2%

EU imports 2009-2013 (volume in t)





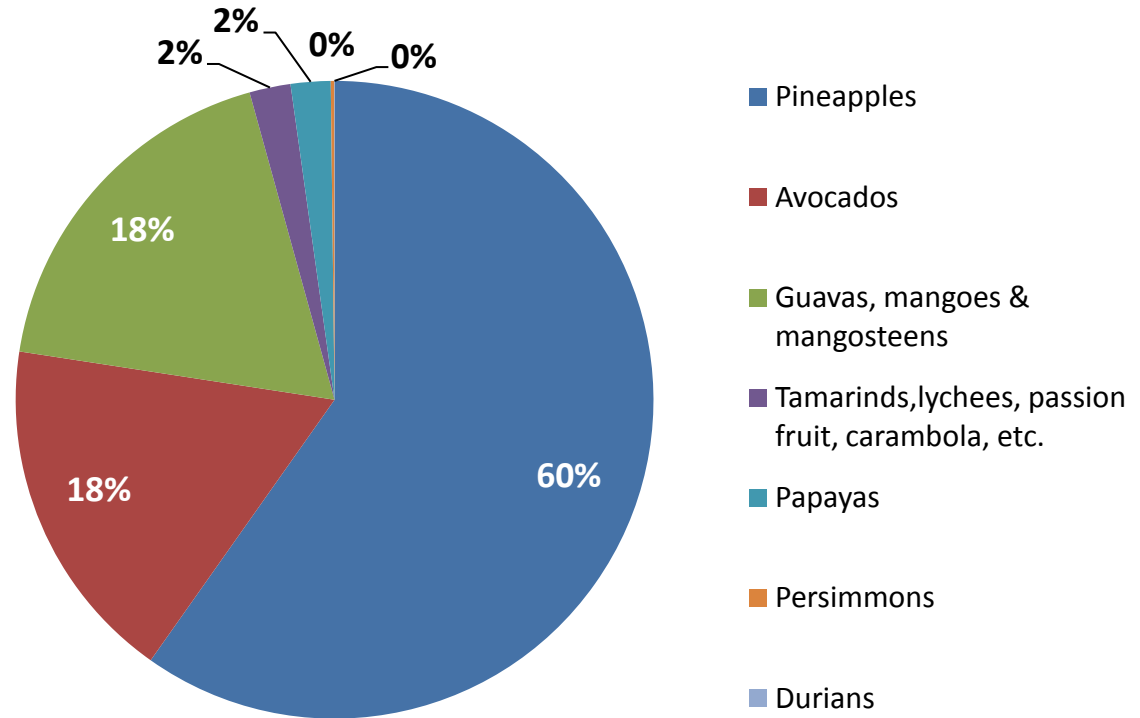
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EU imports

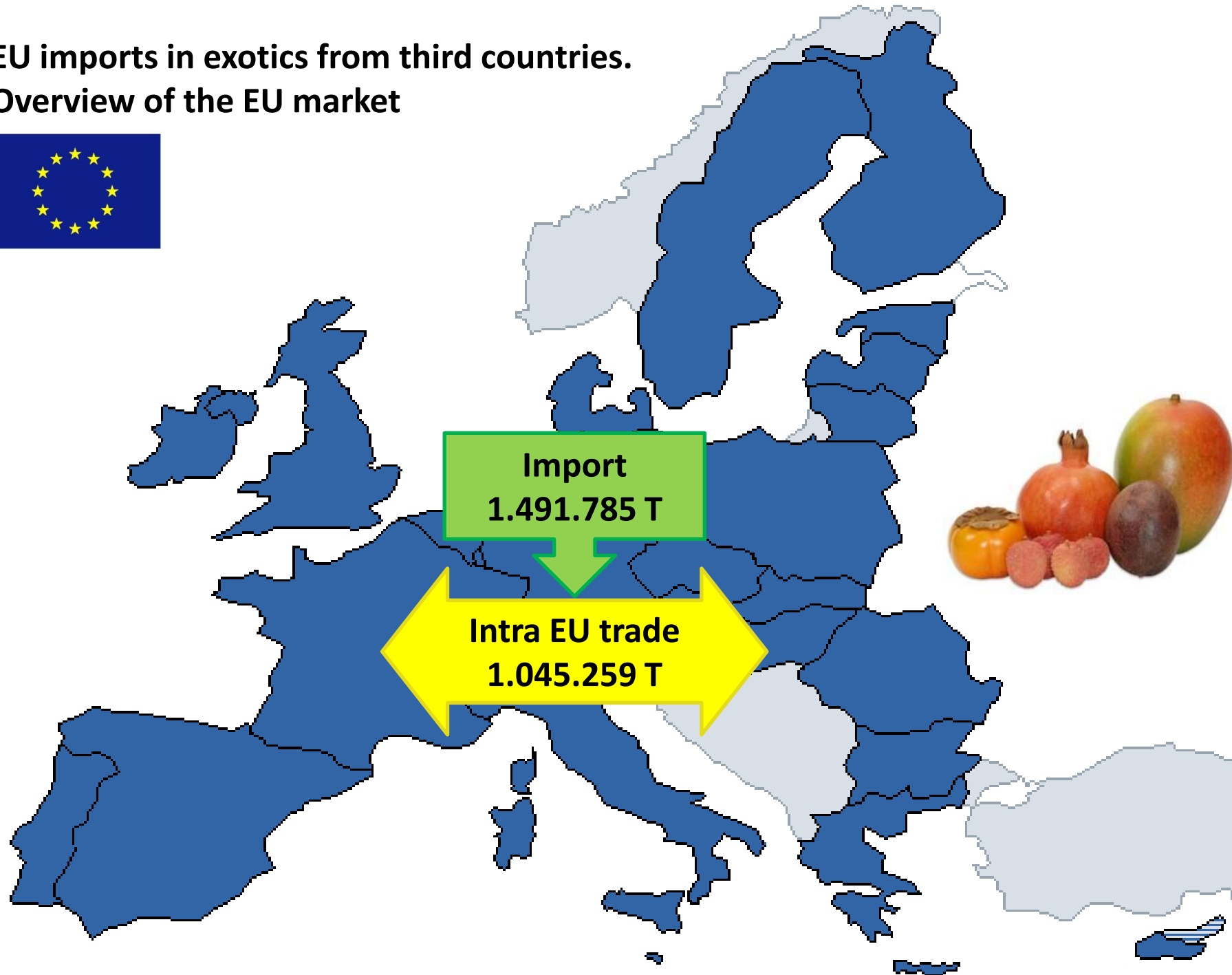
EU Imports in exotics (volume in T)

Year	2013
Costa Rica	707.811
Peru	177.984
Brazil	117.072
Chile	50.746
South Africa	50.442
Israel	50.145
Cote D'Ivoire	41.988
Panama	35.200
Ghana	34.236
Ecuador	22.455
Kenya	13.889
Sub-total	1.301.967
Others	123.808
Total	1.425.775



The EU is the second largest importer of exotic fruit. The EU is also heavily depended on Costa Rica as a trading partner, although only for 50% (2013)

EU imports in exotics from third countries. Overview of the EU market



EU imports in exotics from third countries. Main points of entry



Into the UK:
194.016 T



Into Belgium:
170.838 T



Into the NLs:
518.502 T

Into Spain:
141.833 T



Into Italy:
125.181 T

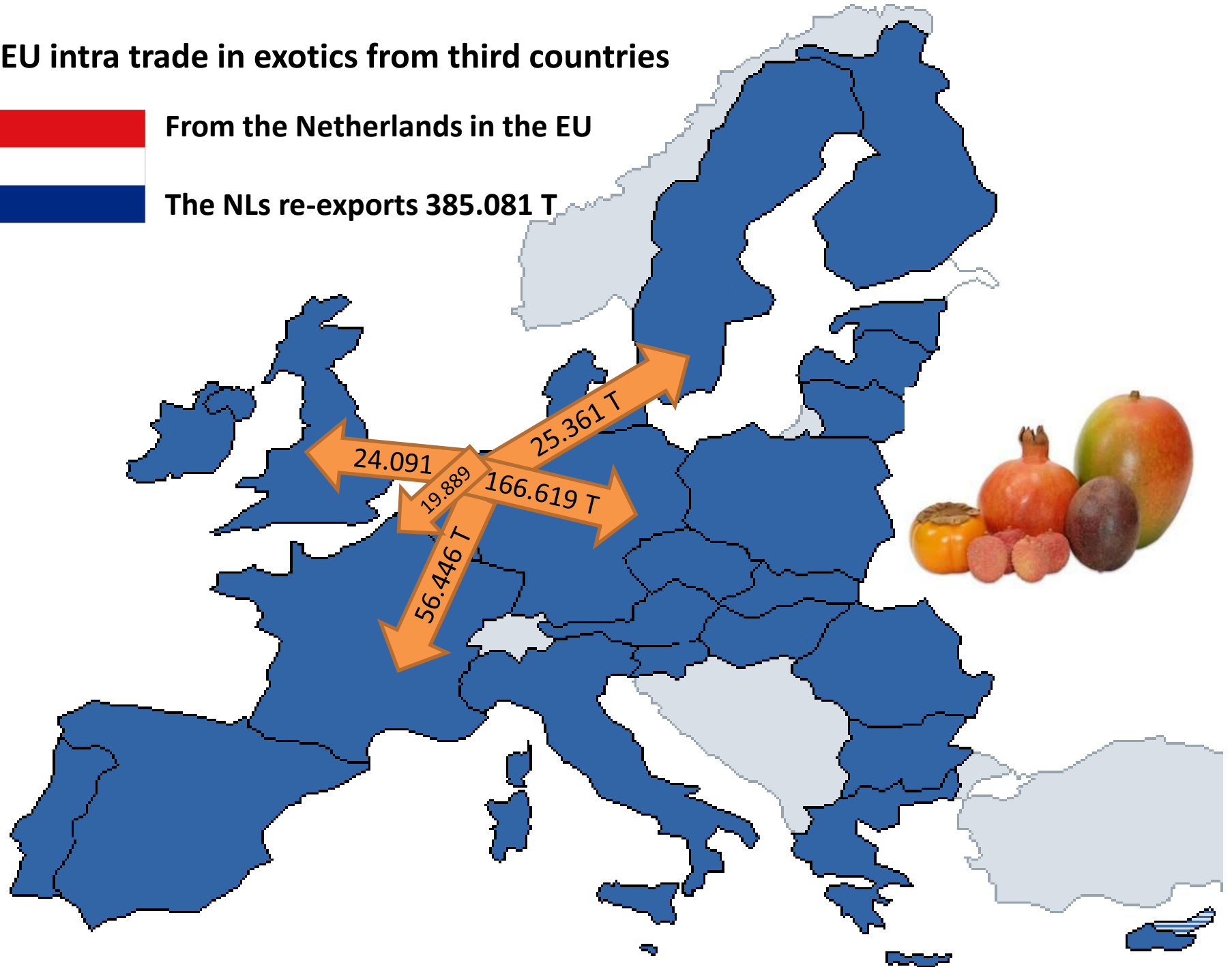


EU intra trade in exotics from third countries



From the Netherlands in the EU

The NLs re-exports 385.081 T



EU imports in exotics from third countries.

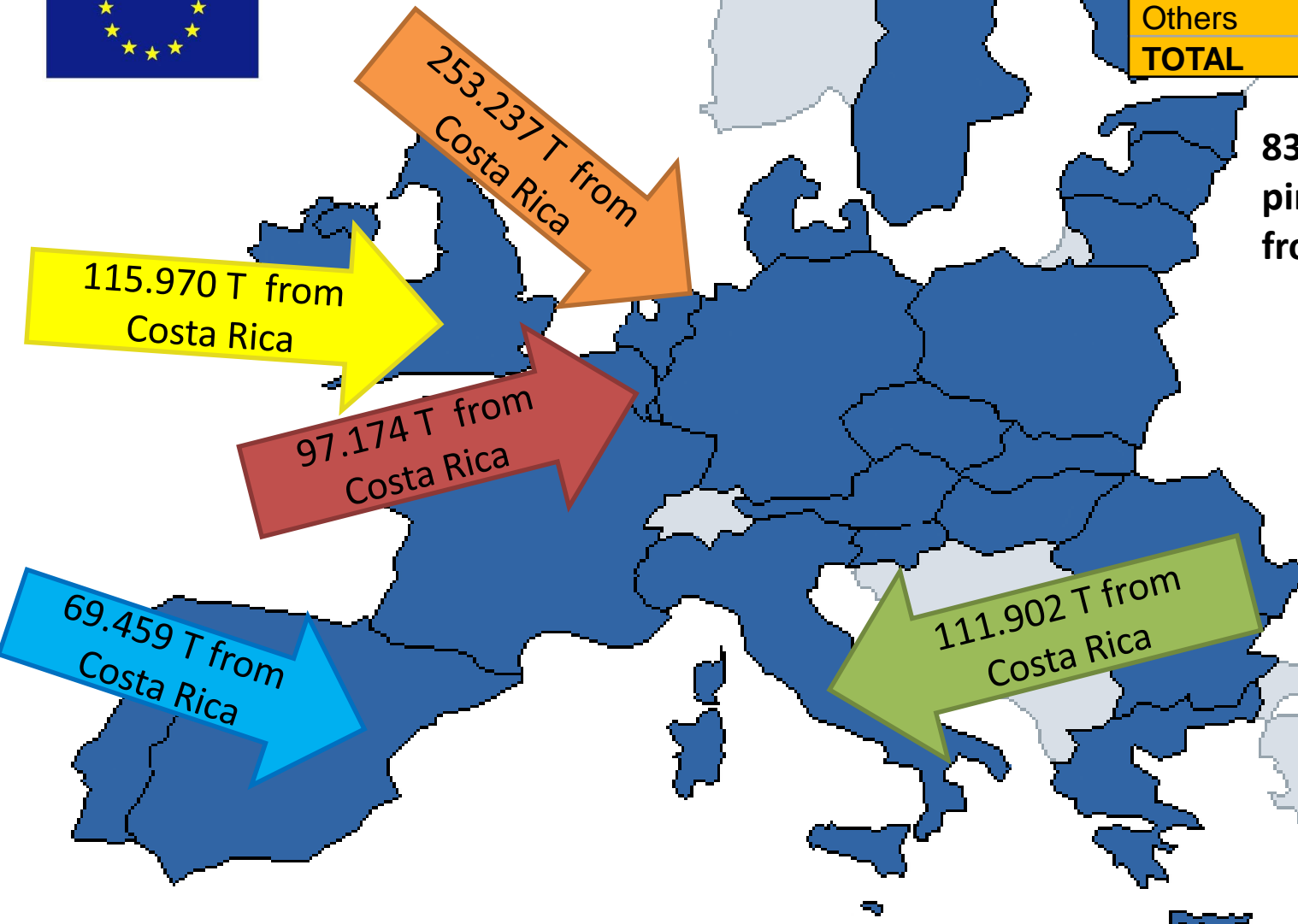
Overview of the EU market

Pineapples 2013



Pineapples, main exporter	
Costa Rica	703.661
Panama	35.162
Ghana	31.323
Cote D'Ivoire	25.435
Peru	23.010
Others	33.785
TOTAL	852.376

83% of all pineapples come from Costa Rica



EU imports in exotics from third countries.

Overview of the EU market

Guavas, Mango and Mangosteen 2013



Guavas & mango main exporter	
Brazil	89.884
Peru	68.689
Cote D'Ivoire	16.553
Pakistan	12.295
Others	73.265
Total	260.686

11.000 T from Peru,
9.000 T from Pakistan
and 5.000 T from Brazil

78.000 T from Brazil,
64.000 T from Peru and
7.500 from Cote D'Ivoire

61% of all
Guavas, Mangos
and Mangosteens
come from Brazil
and Peru

17.000 T from
Brazil and 5.000
from Peru



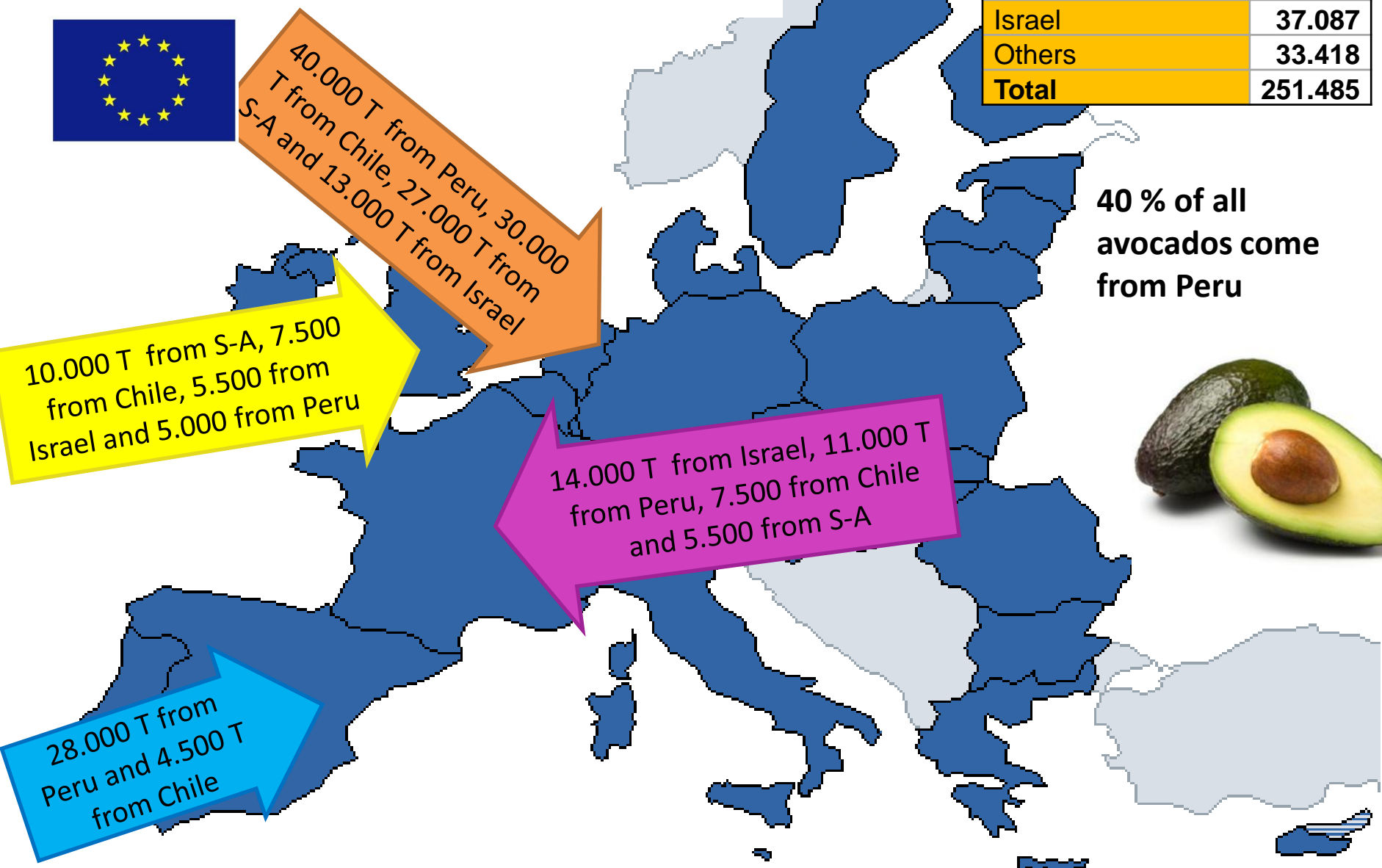
EU imports in exotics from third countries.

Overview of the EU market

Avocado's 2013



Avocados, main exporter	
Peru	86.249
Chile	50.658
South Africa	44.073
Israel	37.087
Others	33.418
Total	251.485



40 % of all avocados come from Peru



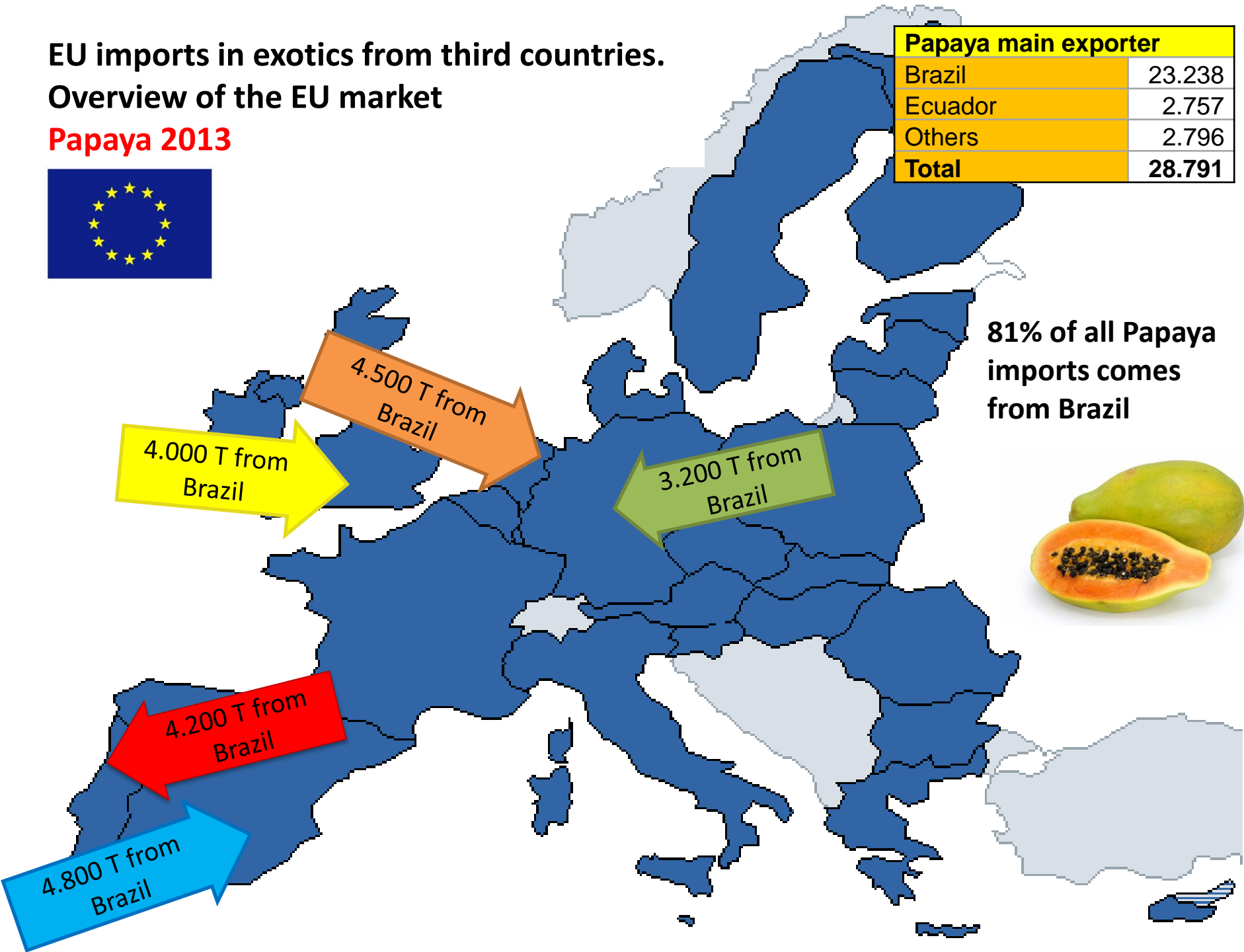
EU imports in exotics from third countries.

Overview of the EU market

Papaya 2013



Papaya main exporter	
Brazil	23.238
Ecuador	2.757
Others	2.796
Total	28.791



81% of all Papaya imports comes from Brazil



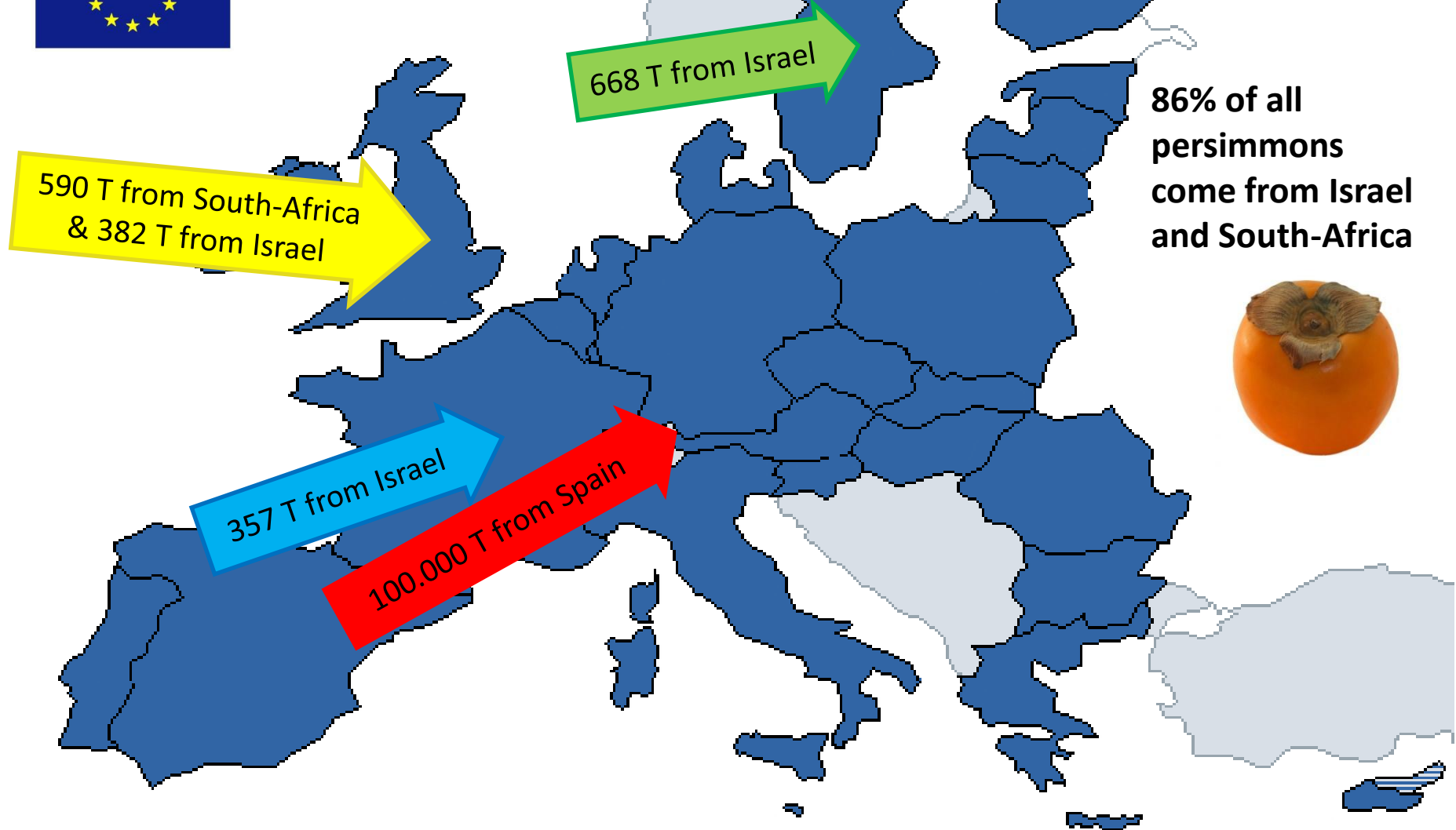
EU imports in exotics from third countries.

Overview of the EU market

Persimmons 2012



Persimmons main exporter	
Israel	1.510
South-Africa	610
Others	354
Total	2.474



86% of all persimmons come from Israel and South-Africa



Consumption trends

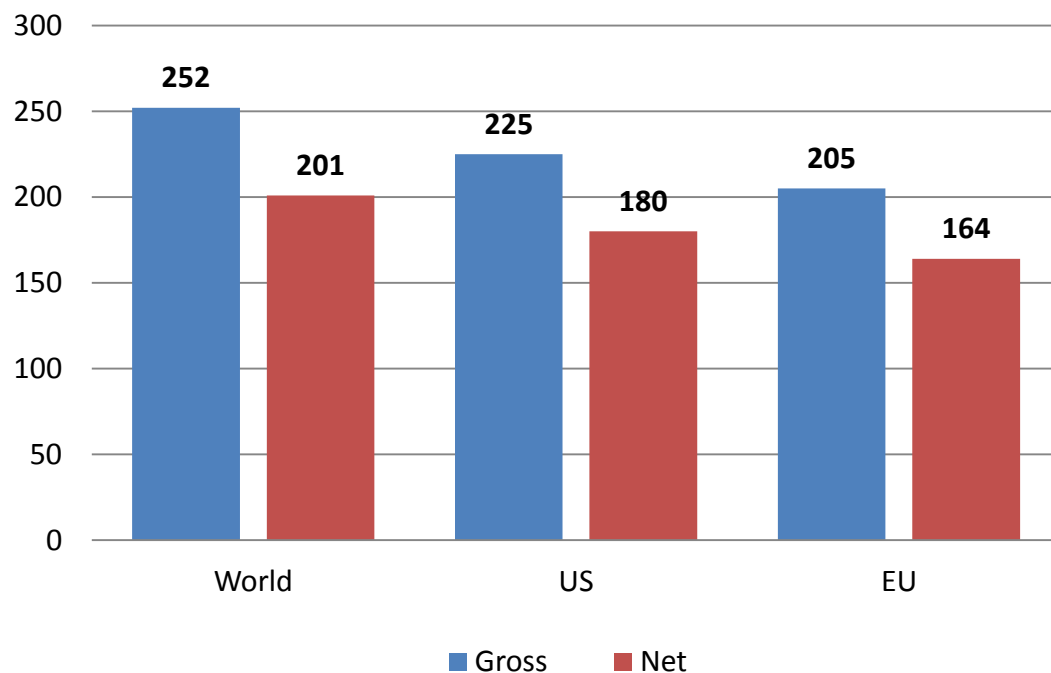


Consumption in total fruit 2012

Consumption gr./capita/day

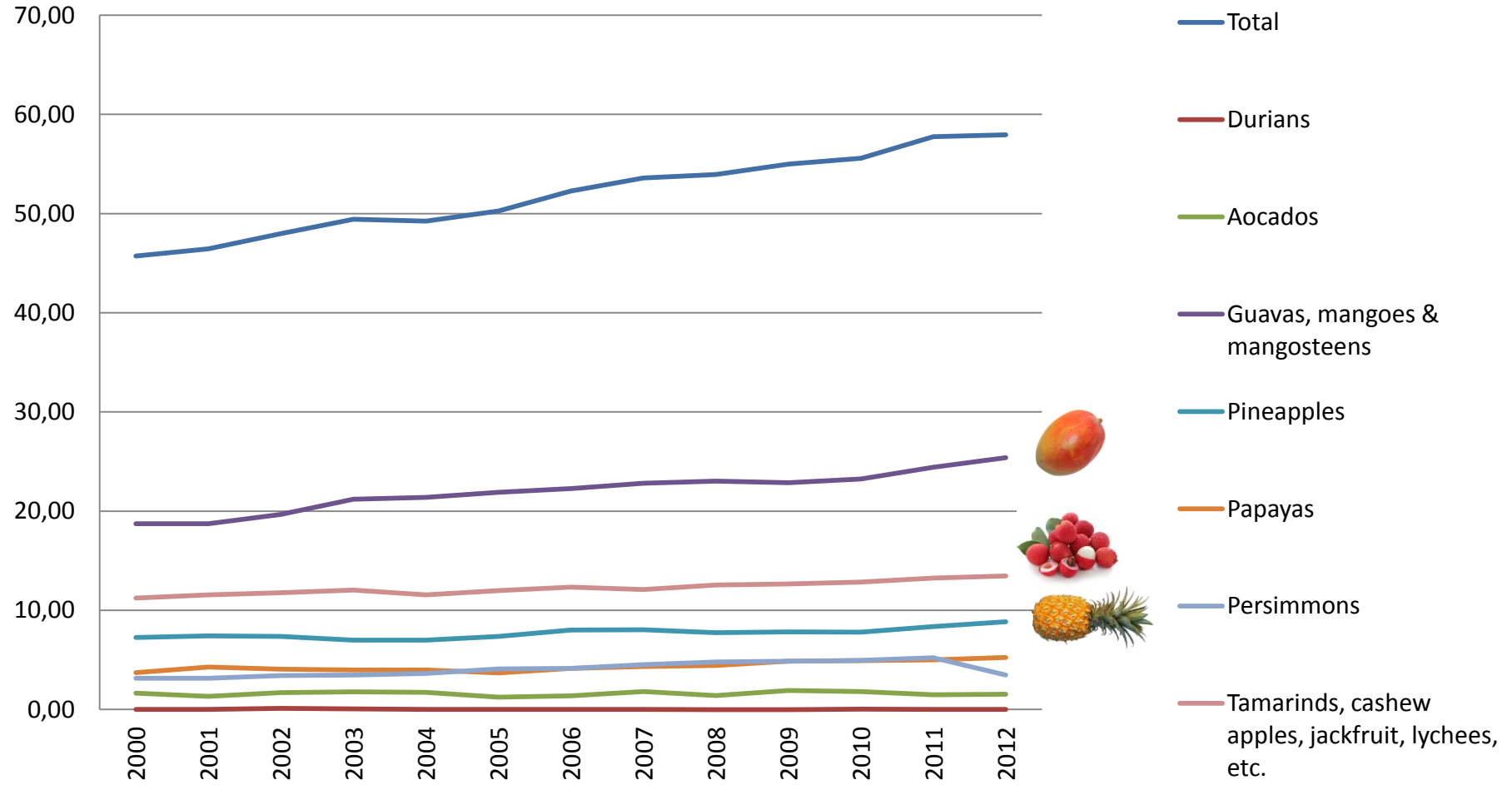
- Worldwide average gross: 252 gr.
- Worldwide average net: 201 gr.
- US average gross: 225 gr.
- US average net: 180 gr.
- EU average gross: 205 gr.
- EU average net: 164 gr.

Comparison consumption world, US, EU - 2012



Gross world consumption

Gross RoW Consumption 2000 - 2012 in exotics (gr./capita/day)



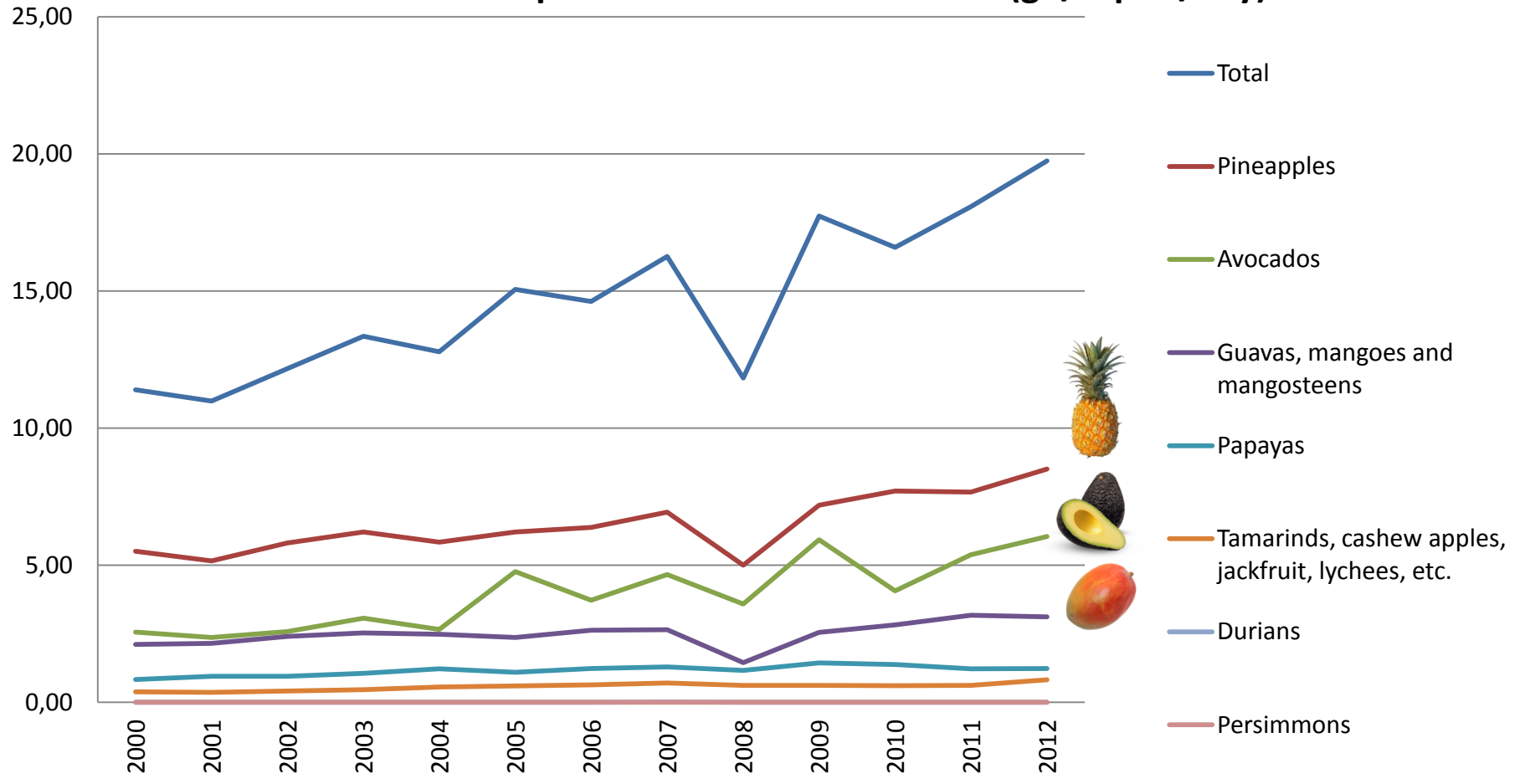
RoW Consumption 2012

- Approximately **23%** of the world consumer fruit basket is exotics fruit.
- However there are obviously large differences between countries. The countries with high levels of exotic production also often had higher levels of exotic consumption
 - Especially in S-America, Caribbean and parts of Asia and Africa



Gross US Consumption

Gross US Consumption 2000 – 2012 in exotics (gr./capita/day)



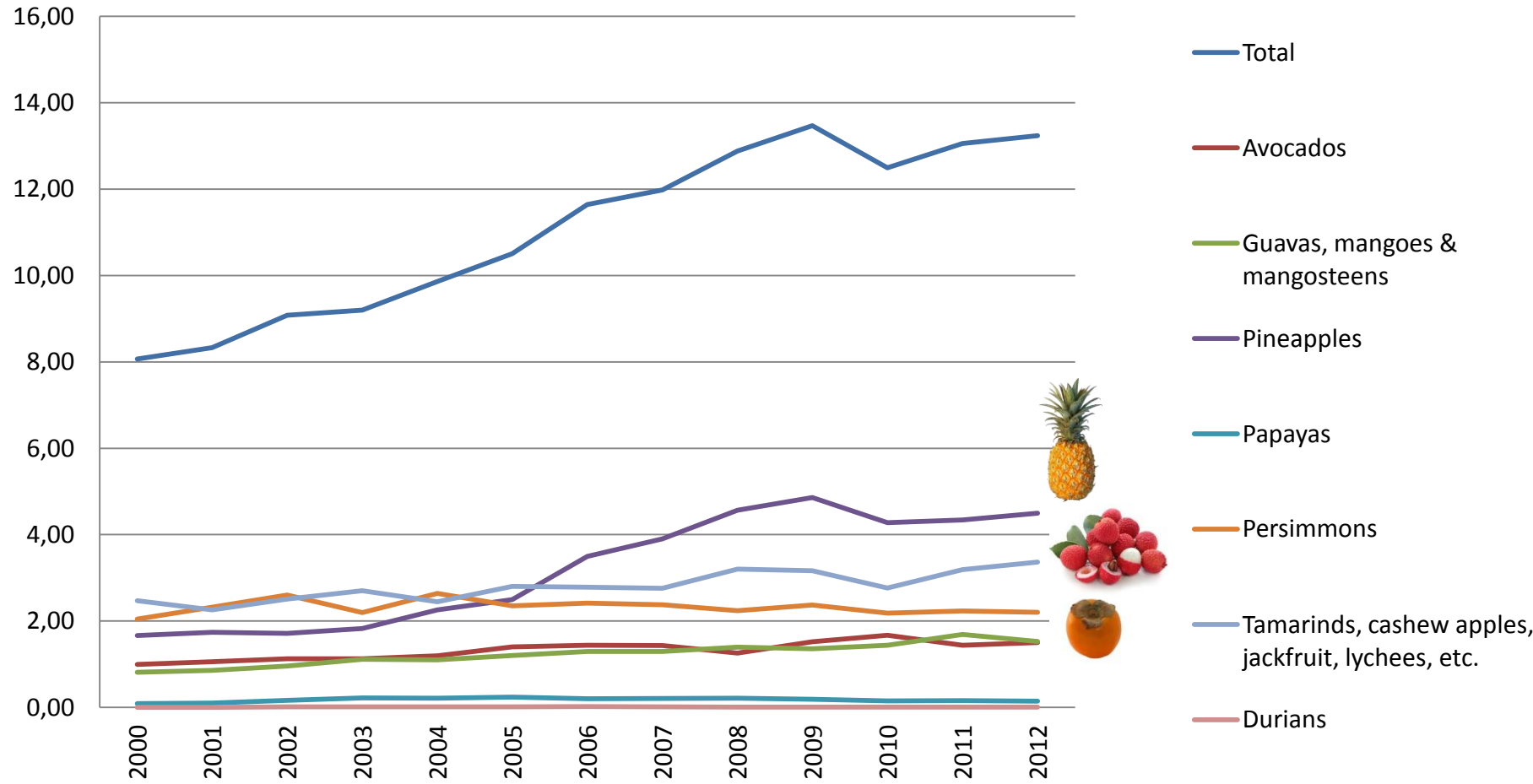
US Consumption 2012

- On average, **9%** of all the fruit consumed in the US is exotics.
- The majority of the exotics consumed are pineapples and avocados.
 - 19.71 gr./capita/day is consumed in exotics
 - 225.23 gr./capita/day is consumed in total fruit



Gross EU Consumption

Gross EU Consumption 2000-2012 in exotics (gr./capita/day)



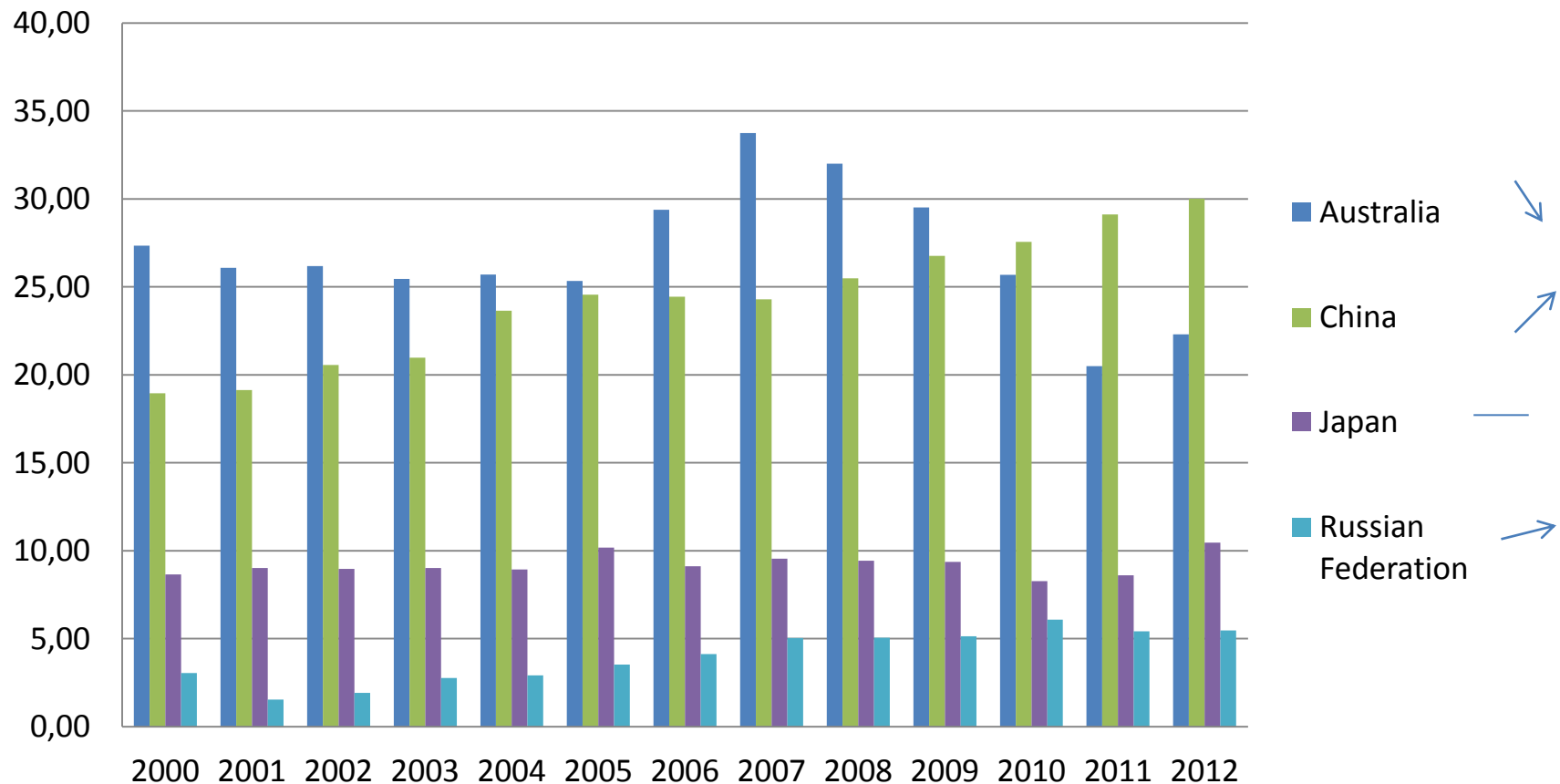
EU Consumption 2012

- On average, **5%** of all fruit consumption is exotics.
- Main consumption is for pineapples, but large differences.
 - Trend in North and Western Europe for avocados, mainly in DK, FR, LV, NL, SE
 - In Middle and Eastern Europe more consumption of other exotic fruits (i.e. tamarinds, jackfruit, lychee, etc.)
Mainly in BG, CY, CZ, HU, MT, PL, RO, SK but also in ES



Other consumption trends

Consumption of exotics (total) in Australia, China, Japan and Russia



Conclusions

- The biggest producers are not the biggest exporters.
- EU and US are heavily relying on Costa Rica as importing partner (mainly because of pineapples).
- Consumption of exotics is on the rise, although certain products rise faster than others (pineapple, mango and avocado).



Any questions?



Tank you for your attention!

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