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World Fruit Map 2018

Global Trade Still Fruitful

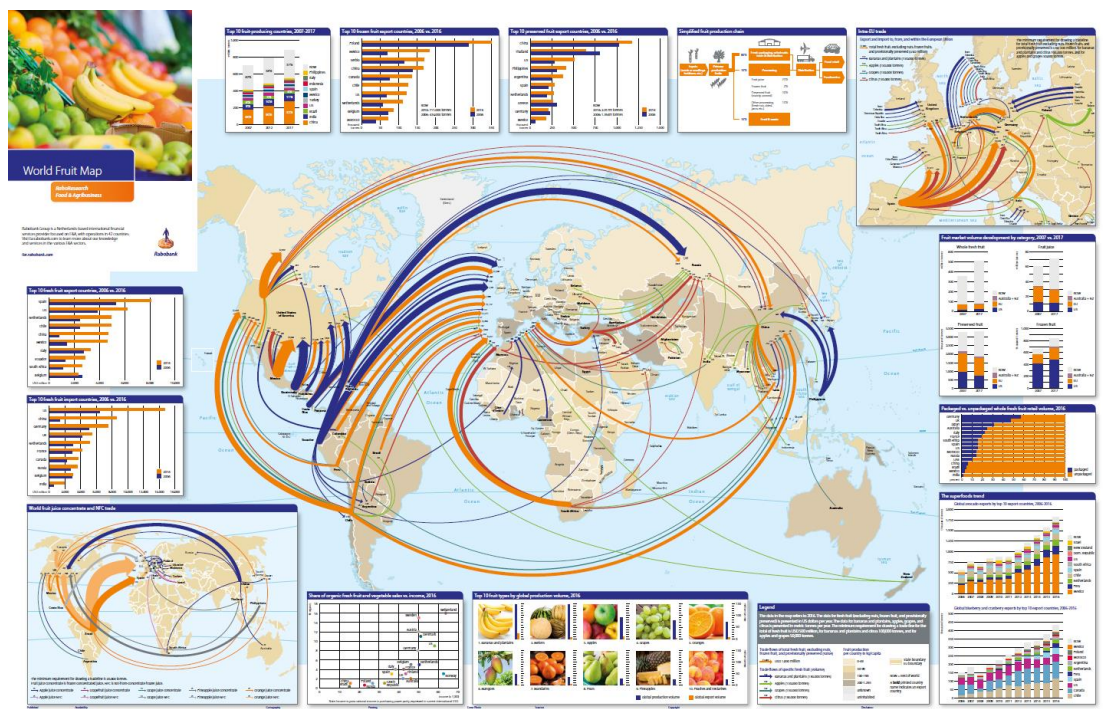
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The 2018 World Fruit Map shows essential fresh fruit and fruit juice trade flows and highlights some key global trends in the fruit sector. These highlights include the growing global popularity of frozen fruit, tripling trade in avocados and blueberries, and the significant rise in China's fresh fruit imports.



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Poster versions of the World Fruit Map are exclusively available to Rabobank clients. To receive one, please contact your relationship manager.

Map summary: Globalisation Goes on

The fruit market is much more of a global market than the vegetable market. About 9% of all fruits grown are traded internationally, and that share is still increasing. Bananas, apples, citrus fruits and grapes are traded worldwide, with Latin America as a dominant global export force and China as a giant and increasing import market. The fruit market also differs from the vegetable market in that a large share of fruit is processed, with juice being a major industry. However, consumption of juices as well as canned fruit is under pressure in mature markets like the US, Europe, and Oceania.

Frozen and fresh fruit are gaining ground

An estimated 80% of all fruits grown globally are sold as whole fresh fruit¹. That fresh fruit market is still growing, mainly outside of the US and the EU. In mature markets, consumer preferences seem to be shifting towards fruit with a more natural and fresh image, including frozen fruit. This is at the expense of shelf-stable products like juice and canned fruits. In the last decade, global demand for frozen fruit has increased by 5% a year. The popularity of berries, one of the main frozen fruit products, has definitely supported this trend. At the same time, global demand for preserved fruit (in cans, pouches, and bottles) has remained flat on a global basis and decreased by over 1% a year in Europe, Australia, and the US.

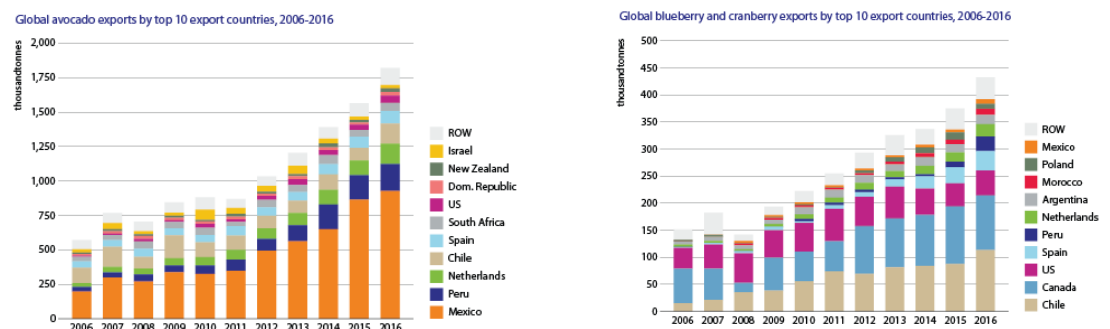
Organic fruit is more than just a luxury item

Organic fruit is another category profiting from changing consumer preferences. Organic foods are gaining market share around the world. In general, the market share of organic fruit is higher in the more affluent countries compared to emerging economies. But income is not the only determinant for buying organic, as the share of organic produce in total produce purchases is varying strongly per country, from 2% in Australia and 5% in the Netherlands to 9% in the US and 15% in Sweden. The reasons behind this variation are likely to do with supermarkets' decisions on the category, price availability, and quality of conventional vegetables, as well as cultural factors. Anyway, organic products fill a certain gap in the market for consumers who want to make conscious food choices, regardless of the evidence.

Superfood trend boosts global fruit trade

Social media seems to play an increasingly important role in fruit consumption trends. In particular the so-called superfoods that are perceived to be extra healthy are on the up. In order to have blueberries, avocados, and other popular fruit types available year-round, most countries in the world have to import them, at least for part of the year. As a result, trade in these products has risen steadily (see Figure 1).

Figure 1: Rising trade in 'superfoods'



Source: UN-Comtrade, 2018

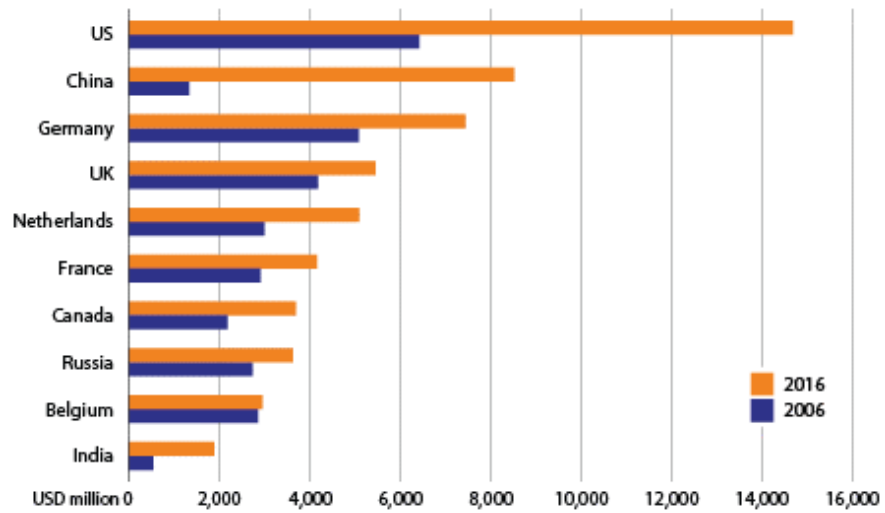
China is setting its stamp on the global fruit market

Most of the increase in international fresh fruit exports, nearly 7% a year over the last decade, has been absorbed by the main import markets: the US, China, and Germany (see Figure 2). But in relative terms, emerging markets like China and India are becoming more important in the global fruit market. China is the world's number one producer, but has also rapidly expanded its imports and exports of fresh and processed fruits.

¹ Fruit processing for alcoholic beverages like cider, wine, and spirits is excluded from our analysis.

Different factors are driving growth in fresh fruit trade, for the world as a whole, and for China in particular: improved market access, changing consumer preferences, a more professional retail environment, increasing purchasing power and last-but-not least the combination of improved logistics, (controlled-atmosphere) storage and cold-chain facilities. Many fruits can be shipped over long distances by transportation by sea. For Latin American countries like Chile, Peru, Ecuador, and Brazil in particular this has opened up a world of opportunities.

Figure 2: Top 10 fresh fruit import countries, 2006 vs. 2016



Source: UN-Comtrade, 2018

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