

# DOING BUSINESS WITH FRUIT AND VEGETABLES SECTOR

## LEVERAGE ON SKYMINDER SOLUTIONS

JUNE 2024 SKYMINDER NEWSLETTER



## Fruit and Vegetable Sector Overview

FAO defines fruit and vegetables as the “edible parts of plants (e.g. seed-bearing structures, flowers, buds, leaves, stems, shoots and roots), either cultivated or harvested wild, in their raw state or in a minimally processed form”.

Excluded are:

- starchy roots and tubers such as cassava, potato, sweet potato and yams (although the leaves of these plants are consumed as vegetables);
- dry grain legumes (pulses); cereals including corn;
- nuts, seeds and oilseeds such as coconuts, walnuts, sunflower seeds;
- medicinal, herbal plants and spices, unless used as vegetables;
- stimulants such as tea, cacao, coffee;
- and processed and ultra-processed products made from fruit and vegetables such as alcoholic beverages (wine, spirits), plant-based meat or meat substitutes, or fruit and vegetable products with added ingredients (packed fruit juices, ketchup).

The precise botanical definition of the word “fruit” is the seedbearing structure (or, more accurately, the ripened ovary as not all fruit have seeds) in flowering plants. The word “vegetable” is not a botanical term. For consumers, and the purposes of this document, fruit and vegetables are distinguished by their culinary uses and their taste: a fruit is commonly the sweet or sour part of a plant, and a vegetable is a savoury part.

SOURCE: FAO



## Facts and Figures

The EU’s fruit and vegetables market management scheme promotes product quality by supporting operational measures such as investments and research. Through measures aimed at improving the planning of production and boosting the commercial value of produce, producer organisations contribute to a more competitive and market-oriented sector. Operational programmes also help farmers switch to more environment-friendly cultivation and production techniques.

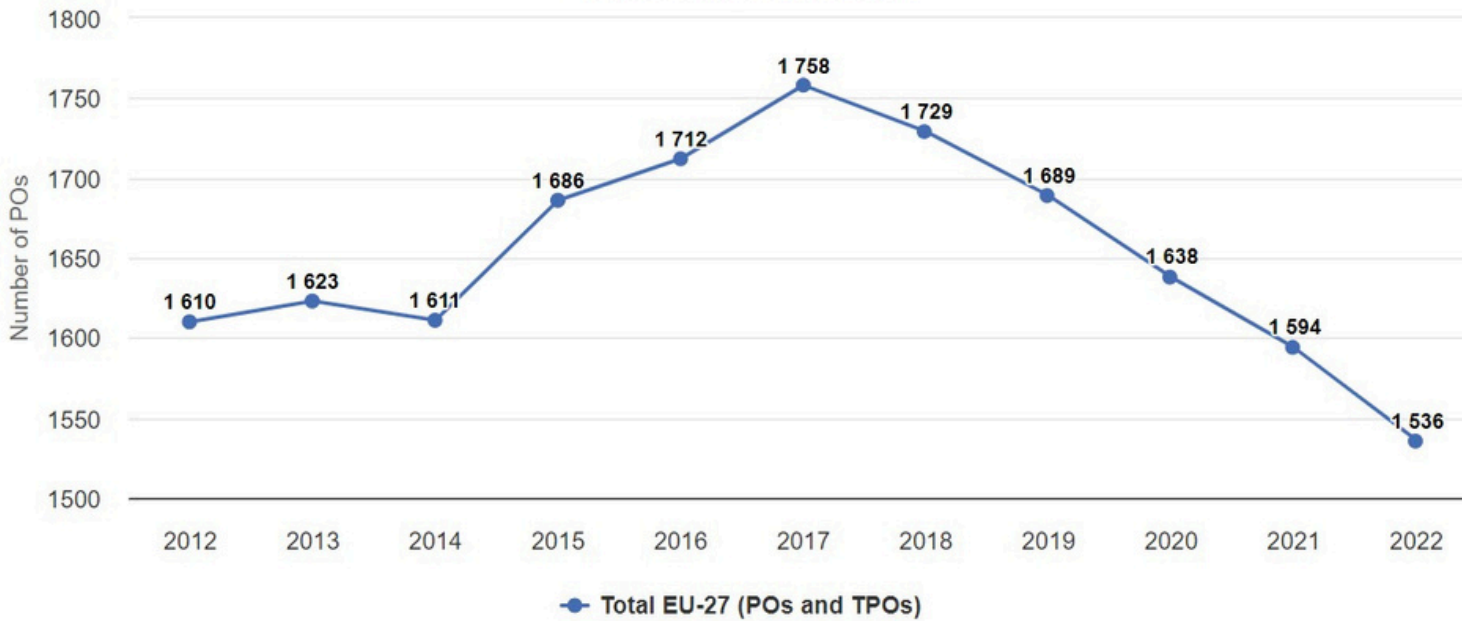
EU countries provide the Commission with yearly statistical data related to fruit and vegetables producer organisations (POs), associations of POs (APOs), transnational POs (TPOs) and transnational association of POs (TAPOs). The annual reports containing this data include the number of organisations and their production and expenditure under operational programs co-financed by the European Union.

### Producer organisations annual reports

There were 1 573 POs and 31 TPOs in the EU-27 in 2020. The following graph displays the evolution of the total number of POs and TPOs from 2012 to 2022 in EU countries:

## Number of POs (including TPOs) in the EU

Source: European Commission

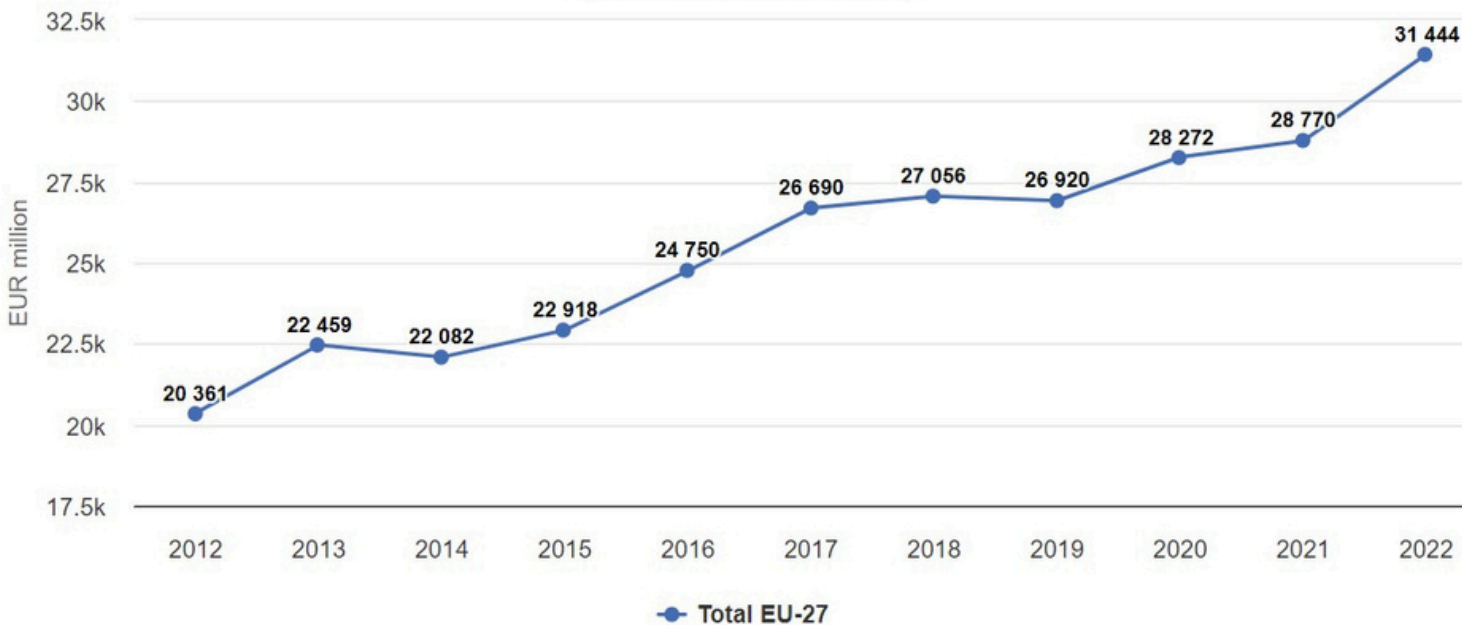


## Value of marketed production annual reports

Value of marketed production of TPOs and POs represented respectively 11% and 89% in 2020 (EU-27). The following graph displays the evolution in millions of euro of the value of marketed production (POs and TPOs) from 2012 to 2022 in EU countries:

## Value of production marketed in fresh and processed (POs and TPOs)

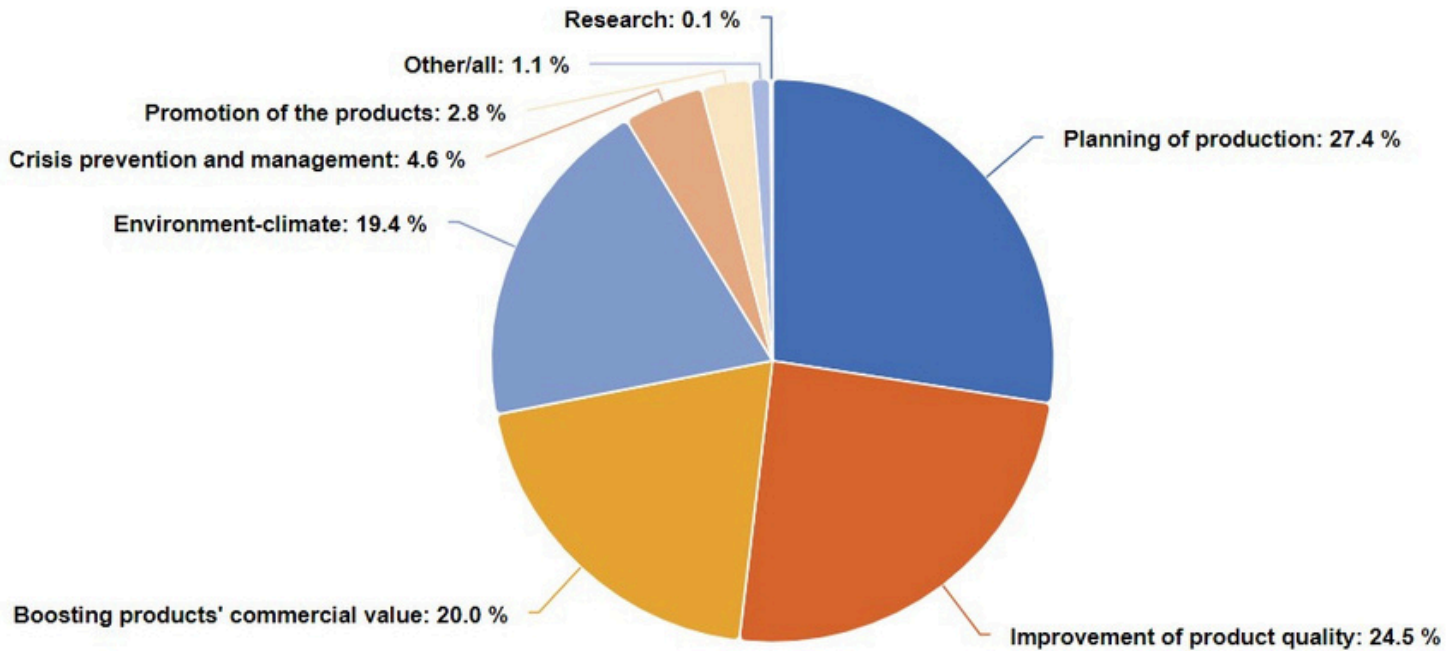
Source: European Commission



The EU fruit and vegetables regime supports POs for implementing operational programmes with funding contributions. The following diagram indicates the share of operational programmes per objective:

### Operational programmes per objective, EU-27, 2022

Source: European Commission



SOURCE: European Union

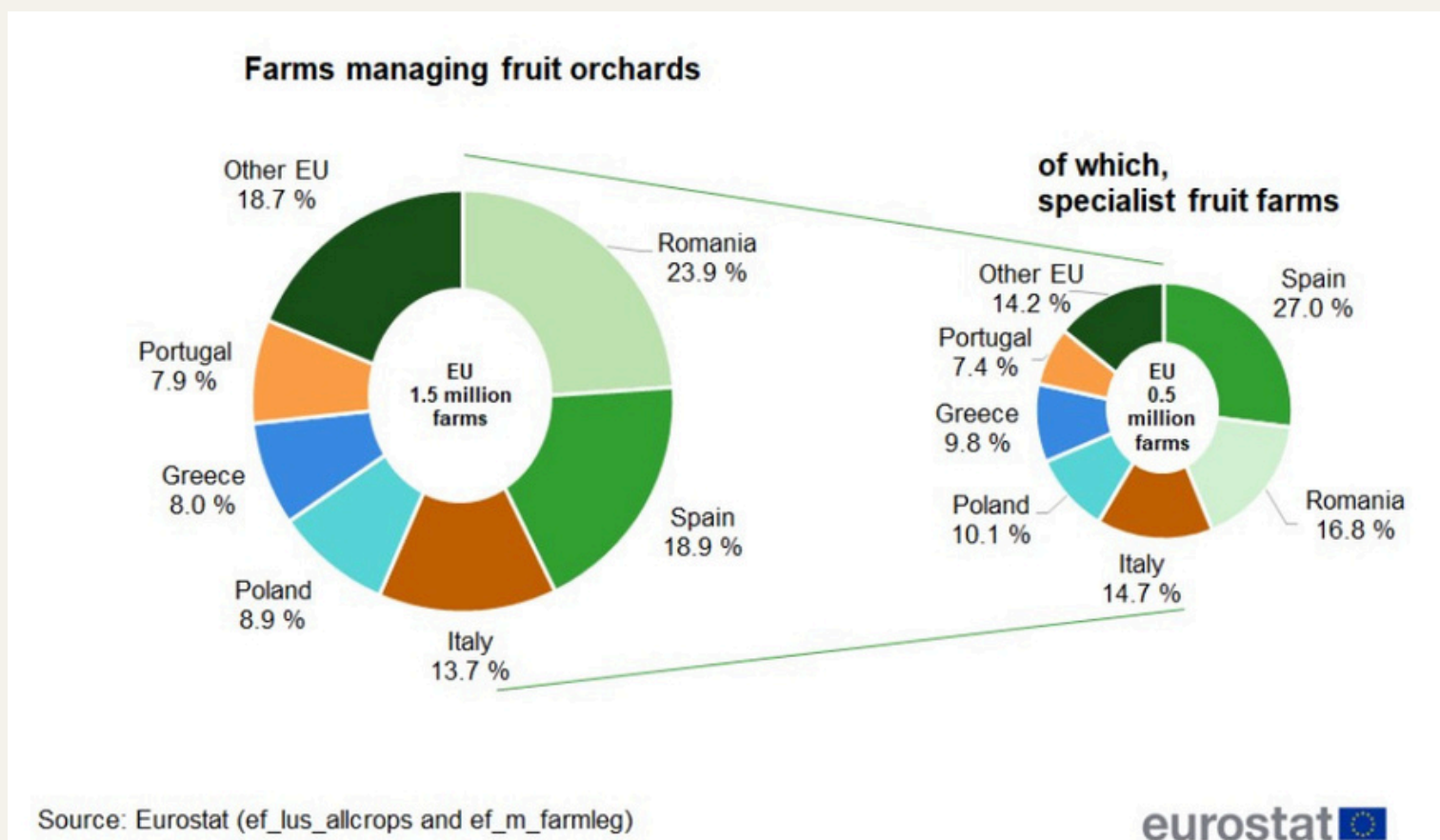


About 1.5 million holdings (hereafter termed 'farms') in the European Union (EU) managed fruit orchards and about 0.7 million farms cultivated fresh vegetables

About 1.5 million farms in the EU managed fruit orchards in 2020, which was equivalent to about one in every six (16.4 %) of all the EU's farms. A small majority of the EU's farms that had fruit orchards were in three Member States: Romania (23.9 % of the EU total), Spain (18.9 %) and Italy (13.7 %). A further one-quarter were in Poland (8.9 %), Greece (8.0 %) and Portugal (7.9 %) combined.

However, only about one-third (34.3 %) of the EU's farms that managed fruit orchards in 2020 were specialised in fruit and citrus cultivation (some 509 000 farms). The remaining one million or so farms on which fruit orchards were managed were either crop specialists, livestock specialists or mixed farms (mixed crop and livestock or mixed cropping).

Farms specialising in fruit and citrus fruit production represented 5.6 % of all the EU's farms in 2020. A little more than three-quarters of these specialist fruit farms were located in five Member States; these were Spain (28.3 %), Italy (15.7 %), Romania (12.6 %) Greece (10.9 %) and Poland (10.5 %).

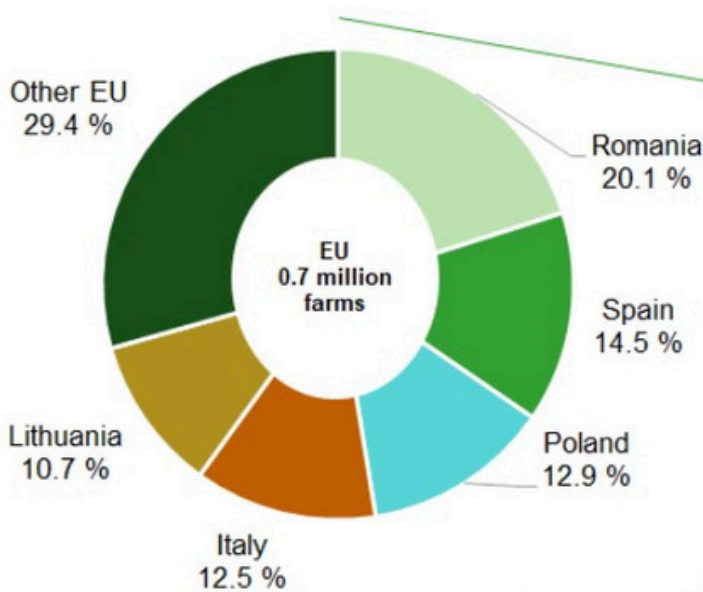


About 709 000 farms in the EU cultivated fresh vegetables in 2020, which was equivalent to about one in every thirteen (7.8 %) of all the EU's farms. Seven in every ten of the farms cultivating fresh vegetables were in just five Member States: Romania (20.1 % of the EU total), Spain (14.5 %), Poland (12.9 %), Italy (12.5 %), and Lithuania (10.7 %).

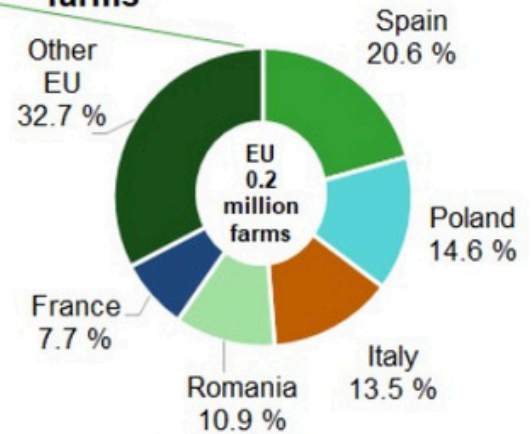
Specialisation in fresh vegetable production is less widespread than it is for fruit. Bearing in mind that the classification for specialist horticultural farms also includes farms that produce flowers and ornamental plants in addition to fresh vegetables, there were only 206 000 farms in the EU that were classified as specialist horticulture holdings[3]. About seven in every ten of these specialist horticultural farms were in just five Member States: Spain (20.6 % of the EU total), Poland (14.6 %), Italy (13.5 %), Romania (10.9 %) and France (7.7 %).

**Share of EU farms growing fresh vegetables and of the EU's specialist horticultural farms (% , 2020)**

**Farms cultivating fresh vegetables**



**of which, specialist horticultural farms**



Source: Eurostat (ef\_lus\_allcrops and ef\_m\_farmleg)

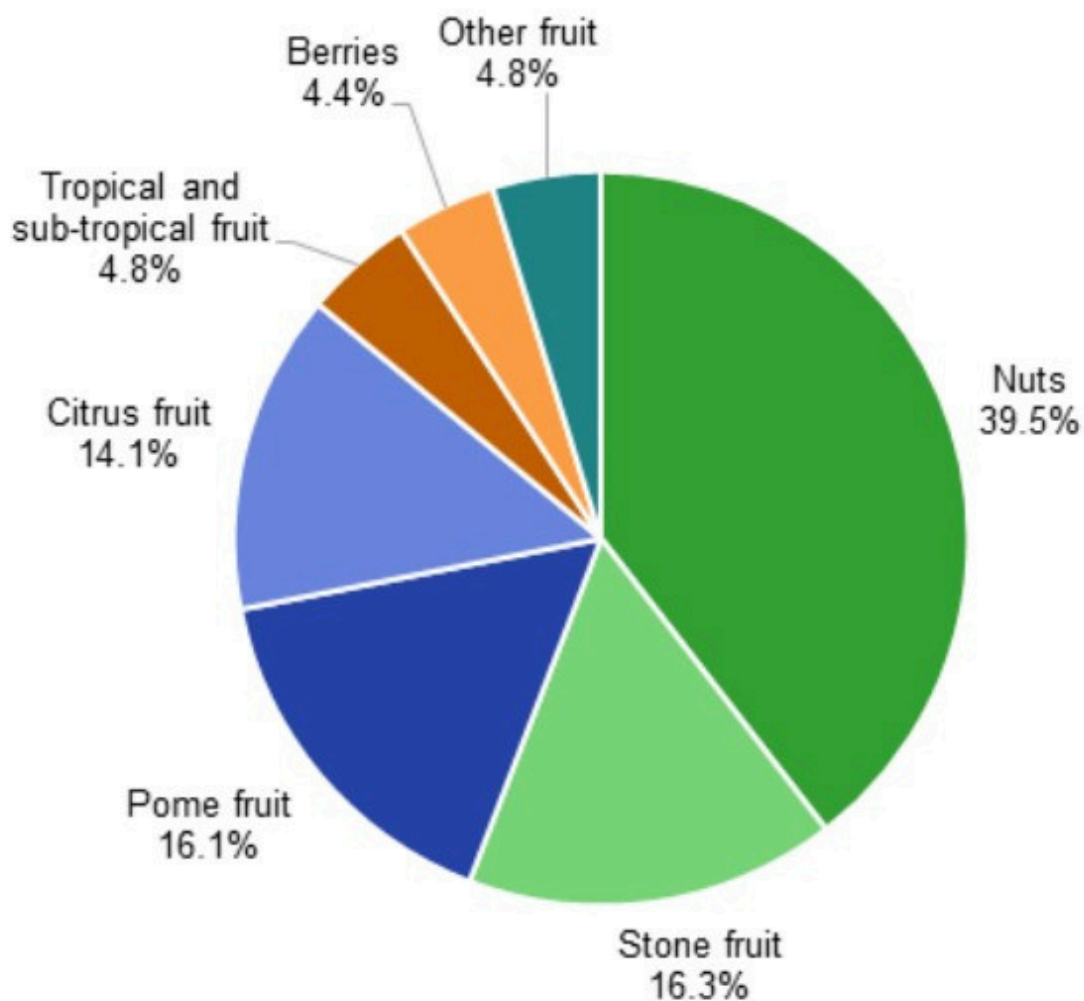


## 3.7 million hectares in the EU are dedicated to growing fruit – two-fifths in Spain – with almond trees and apple trees the most widely cultivated

Almost 3.7 million hectares of land were planted to fruit in the EU in 2022, representing an estimated 2 % of all utilised agricultural land. Nut orchards accounted for about 40 % of the total area of fruit, stone fruit orchards about 16 %, pome fruit orchards (apples and pears) another 16 % and citrus fruit orchards 14 %. The remaining area planted for fruit was split between tropical and sub-tropical fruit (about 5 % of the total area of fruit), berries (about 4 %) and other fruit like table grapes.

### Share of EU fruit area

(%, type of fruit, 2022)



Source: Eurostat (online data code: apro\_cpsh1)

eurostat 

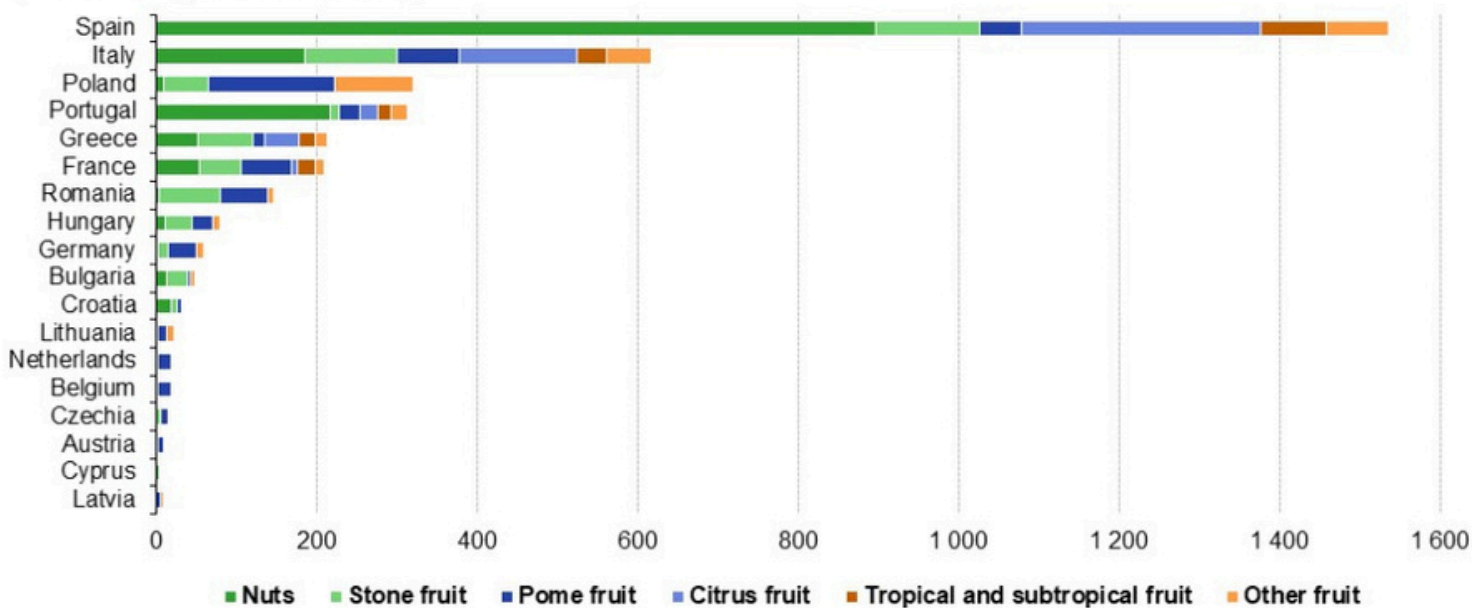
Spain used 1.5 million hectares of land for fruit production in 2022, almost 60 % of which was for nut production (particularly almonds) and about 20 % for citrus fruit production. Spain accounted, therefore, for about two-fifths of all the EU's fruit production area. The next highest share was in Italy (about 17 %), followed by Poland (about 9 %) and Portugal (about 8 %).

Almond orchards were the single species occupying the largest fruit area in the EU in 2022: 0.9 million hectares (about 25 % of the EU fruit area), of which Spain accounted for about 85 %. Spain was the second largest almond producer in the world after the United States of America, ahead of Australia.

Apple orchards were the second most common single species, covering 0.5 million hectares and accounting for about 13 % of the total fruit area of the EU. Apples were grown in every Member State. Nearly one-third (about 32 %) of the EU's apple orchards were in Poland, a Member State where apples accounted for almost one-half (47 %) of its total fruit area. A further one-third of the EU's apple orchards were shared between Romania, France, and Italy (all 11 % of the EU total).

### Fruit area

(1 000 ha, type of fruit, 2022)



Note: Areas of fruit in Slovakia, Slovenia, Denmark, Estonia, Finland, Sweden, Ireland, Malta and Luxembourg not shown as less than 5 000 ha.

Source: Eurostat (online data code: apro\_cpsh1)

eurostat



The share of apple orchard area in Romania was much higher than its equivalent share (4.3 %) of the European apple harvest. A majority of the EU's apple production of 12.6 million tonnes in 2022 came from Poland (34.0 %), Italy (18.0 %) and France (14.2 %).

### Average area of fruit orchards and fresh vegetables per farm is relatively low, particularly in Romania

The average area of fruit production on the 1.5 million farms managing the EU's orchards was 2.5 hectares in 2020. Whilst Romania had the highest number of farms managing orchards, they were generally very small (an average 0.4 hectares). By comparison, the average in Spain was 5.3 hectares, with the highest averages in the Netherlands (7.1 hectares) and Belgium (11.1 hectares).

Likewise, although Romania had the highest number of farms growing fresh vegetables, they were generally much smaller than the EU average (0.7 hectares compared with 2.7 hectares). The average area of fresh vegetables on farms growing fresh vegetables was highest in Ireland (13.1 hectares, although there were only 330 farms growing fresh vegetables) and was also more than 10 hectares in the Netherlands, Denmark and Germany.

### 2.0 million hectares in the EU dedicated to growing fresh vegetables, just over one-half of which was in Italy, Spain and France combined

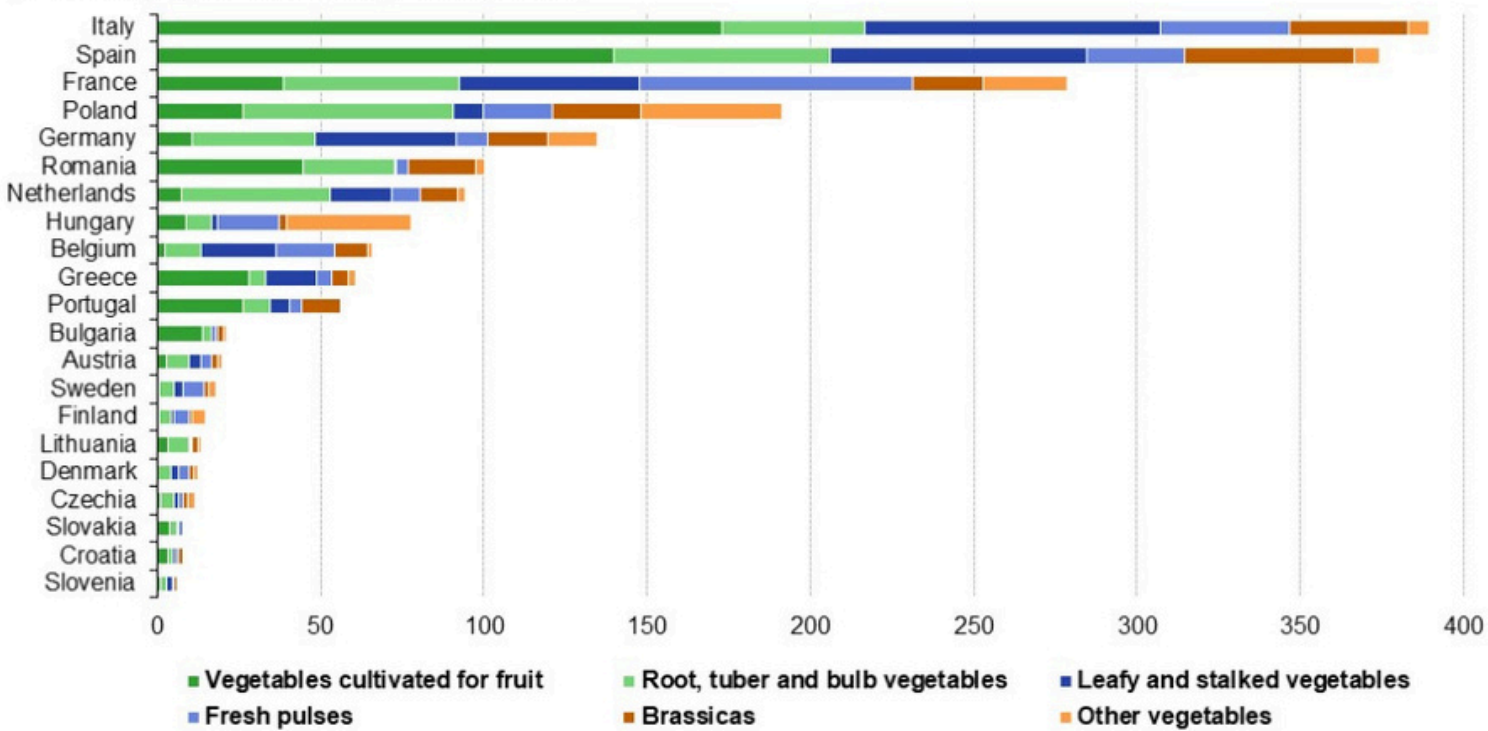
About 2.0 million hectares of land in the EU was used to produce fresh vegetables in 2022, representing an estimated 1 % of the EU's total utilised agricultural area, on which 59.8 million tonnes of crop were produced. Note that the areas for melon and strawberry production are included in these figures. For more details on vegetable production, please refer to the Key Figures on the European food chain.

The group of fresh vegetables that comprises tomatoes, peppers, aubergines, melons, courgettes, cucumbers and gherkins (i.e. vegetables cultivated for fruits) accounted for a little over one-quarter (27.2 %) of this total area. Root, tuber and bulb vegetables, such as carrots, radishes, onions, shallots and garlic accounted for a further one-fifth (an estimated 21.1 %) of the total, followed closely (18.2 %) by the diverse group of leafy and stalked vegetables (such as lettuce, spinach, chicory, endives, asparagus, artichokes etc.). Among other key vegetable groups, fresh pulses (mainly peas and beans) were produced on 13.4 % of the EU's fresh vegetables area in 2022, with brassicas grown on a further 11.8 %.

The areas planted to fresh vegetables in Italy (19.7 % of the EU total), Spain (19.0 %) and France (14.1 %) were considerably more than other EU countries and together represented a majority of the area planted to fresh vegetables in the EU in 2022.

### Vegetable area

(1 000 ha, type of fresh vegetable, 2022)



Note: Areas of fresh vegetables in Ireland, Latvia, Cyprus, Estonia, Malta and Luxembourg not shown as less than 5 000 ha.

Source: Eurostat (online data code: apro\_cpsh1)

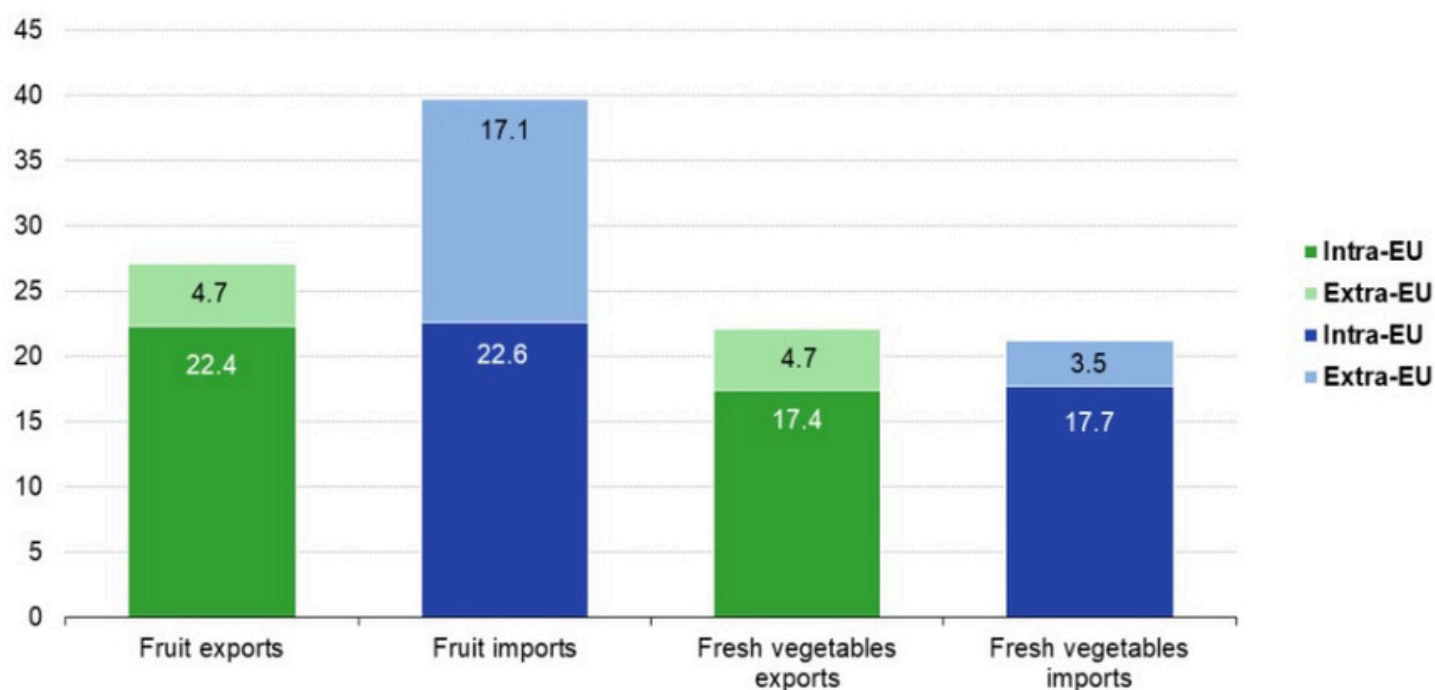
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## EU net importer of fruits and fresh vegetables

The EU is traditionally a net importer of fruits and fresh vegetables[7]. In 2022, the value of the EU's imports of fruits and fresh vegetables from non-EU countries was EUR 20.6 billion. This was considerably more than the EU's exports of fruits and fresh vegetables (EUR 9.4 billion), resulting in a trade deficit of EUR 11.2 billion in these products.

The intra-EU trade in fruit accounted for 56.2 % of the total value of the internal trade in fruits and fresh vegetables in 2022. Among fruit, the value of the intra-EU trade in citrus fruit as a whole was highest (representing 12.3 % of the total value of fruits and fresh vegetables in 2022). Among the fresh vegetables, the value of the intra-EU trade in the grouping of crops within 'other vegetables' was highest (representing 14.4 % of the total value of fruits and fresh vegetables). In terms of a single crop, rather than a grouping of crops, the value of the intra-EU trade in tomatoes was highest in 2022 (accounting for 9.1 % of the total value of fruits and fresh vegetables).

**Intra- and extra-EU trade in fruit and fresh vegetables**  
(€ billion, EU, 2022)



Source: Eurostat (online data code: DS-016894, DS-016890)

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# SKYMINDER AT A GLANCE FOR FRUIT AND VEGETABLE SECTOR

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SkyMinder is the worldwide CRIF platform helping you to take decisions based on high-quality information. If you are required to evaluate a business partner in the Fruit and Vegetables Sector, a customer or a supplier, in a risk evaluation process or for compliance requirements or a cyber risk assessment, SkyMinder is the right

Requirement	SkyMinder Solution	Description
Know business partners and risk level <ul style="list-style-type: none"> <li>- have on board new suppliers</li> <li>- understand in depth customers creditworthiness</li> </ul>	<b>Full Report, Slim Report, Quick Report</b>	Information, with different level of details, related to all companies in the world, including firmographics, credit limit, risk indicator, management, shareholders, negative events etc.
Receive immediate notification with related details if a change affects a company	<b>Full Monitoring</b>	Detailed information about changes affecting a company as soon as happened. Combined possibility to request for free updated report.
Be alerted if there is change in company's information	<b>Alert</b>	Information related to the area involved by a change as soon as an event happened.
Periodically checks if there are changes involving companies	<b>Planned Revision</b>	Scheduled revision with updated report including company's changes if applicable
Obtain documents from Official Registry and LEI repository	<b>Official Registry and LEI</b>	Product range including documents coming from public sources or from LEI Registry
Company ownership overview	<b>Verification Report</b>	List of shareholders to understand company's structure
Compliance requirements and fraud checks	<b>Compliance Report and Extended Check Report</b>	Anti-Bribery and Money Laundering lists checks related to financial crimes.
Risk of Cyber attack	<b>Cyber Risk Report</b>	Assess the level of risk related to a business partner in being involved in a cyber attack
Understand overall value of intangible assets of a company	<b>Patent Due Diligence Report</b>	Patent Asset Overview with geographical coverage, remaining life of active patent assets, high-value patent assets, technology and patent deployment, technology timeline, peer comparison, key inventors.