



# FRUIT MARKETS IN EASTERN EUROPE

A report by  
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In 2004, many international operators thought that the addition of eight Eastern European countries to the European Union and the resulting improved standard of living would trigger the rapid growth of imported fresh fruit markets. It is clear in 2010 that the trend for fruit imports to increase has been much weaker than forecast. **Fruitrop** examines the causes of this lack of dynamism and the factors that slow imports in Eastern Europe.



## The fruit markets in Eastern Europe

An eldorado that has not come up to expectations ... yet

Eastern Europe stretches from the Bohemian forests to the Urals and groups some twenty countries strongly marked by the birth of the USSR in 1922 and its dissolution in 1991. Subsequently, many of these countries, released from the soviet model sought to quickly adopt the western capitalist model and the state enterprises were privatised. Eight countries joined the European Union

in 2004: Estonia, Hungary, Latvia, Lithuania, Poland, the Czech Republic, Slovakia and Slovenia. They were followed by Bulgaria and Romania in 2007. In addition to the ten EU members, the countries with substantial weight as regards population and influence on the fruit markets in Eastern Europe are Belarus, Croatia, Russia and Ukraine. Even if only the European part of Russia is taken into

account, Eastern Europe covers a vast 6.2 million km<sup>2</sup> in comparison with Western Europe's 3.6 million. The climate is continental with hard winters and hot summers, making the central part suitable for apple growing. The population of the 14 countries totals about 300 million, with a fairly rapid improvement of the standard of living and a westernisation of consumer habits.



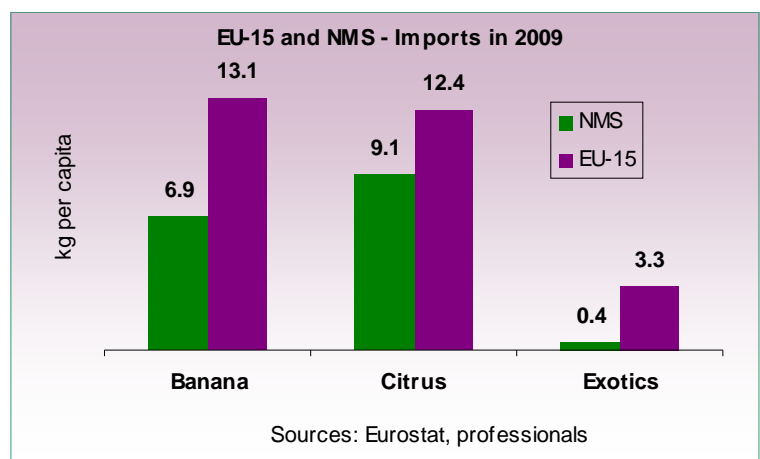
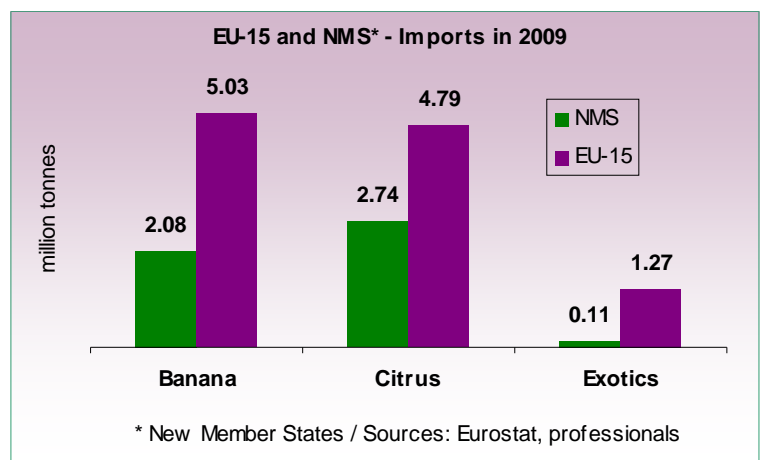
### Geography little suited to direct imports

Eastern Europe has a fairly limited coastline, with access only via the Black Sea and the Baltic. The ports are therefore of moderate size in comparison with those on the Mediterranean and Atlantic coasts and the main ones are Constanza, Novorossisk and Odessa on the Black Sea and Gdansk, St Petersburg, Tallin and Ventspils on the Baltic. Novorossisk and St Petersburg, both in Russia, are the main points of entry. St Petersburg handles 80% of the fruits arriving for the Russian market but ice makes access difficult in the winter and specialised ships must be used. Romania provides good access via the port of Constanza. Although Ukraine and Poland have extensive coasts sea traffic is fairly small. Fruits for Eastern Europe arrive mainly in Rotterdam and Antwerp and are then forwarded to the various countries by road. The state of the road system is determinant is satisfactory transport of goods.

### A strongly growing economy

The dissolution of the Soviet Union and the successive independence of the different Eastern European countries have changed the economy in the region. Western style consumer society became a development model, with an opening to capitalism and accelerated growth. Massive investment by Western European companies attracted by inexpensive labour led to the development of industry with excellent performance and growth rates in the 2000s have been much higher than those observed in Western Europe. The economies of most Eastern European countries are based on the manufacturing sector, contributing 34% of the GDP on average, with strong focus on the car industry and machine tools. However, the bursting of the US real estate bubble in 2008 and the effects of the world financial downturn and the resulting decrease in consumer spending hit these countries particularly hard. First, their currencies slid considerably against the euro: the Hungarian forint lost 28% between August 2008 and March 2009 and the Polish zloty lost 35% against the euro during the same period. This resulted in price increases for goods from the euro zone—the case of most imported fruits—further slowing consumption.

However that may be, the profiles of the countries in Eastern Europe and particularly those of central Europe have changed completely in





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twenty years as regards purchasing power, consumption patterns, diet and distribution channels.

### Small fruit consumption

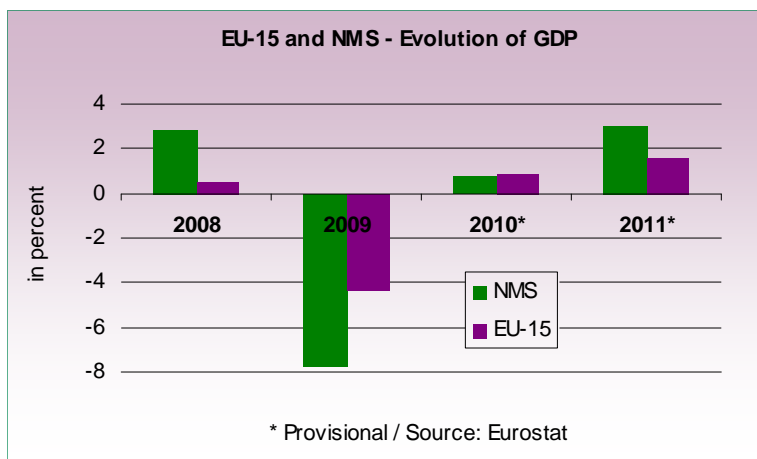
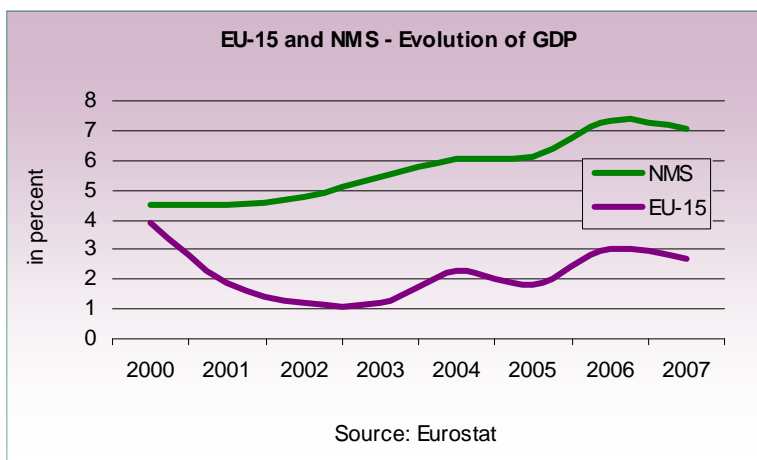
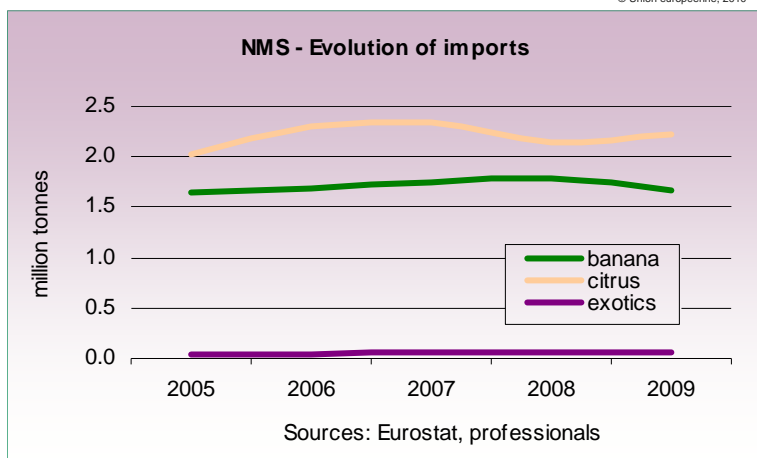
However, fruit consumption differs considerably between Eastern and Western Europe. Apparent average consumption in the east is some 54 kg per person per year (18 kg citrus and tropical fruits and 36 kg temperate fruits) in comparison with 92 kg per person per year (42 kg citrus and tropical fruits and 50 kg temperate fruits) in EU-15.

The difference in consumption is greater for citrus and tropical fruits than for temperate produce. The gap is largest for oranges at 15 kg per person per year in EU-15 and 3.5 kg in Eastern Europe where this fruit is strongly seasonal, with 60% of the volumes sold during the four winter months.

These figures show first of all that the Eastern European countries display general underconsumption of citrus and tropical fruits. Joining the EU was followed by a decrease in fruit consumption, mainly caused by the decrease in volumes of bananas, the leading imported fruit. Indeed, EU membership meant that these countries had to accept the common market organisation of bananas and this set new constraints in the form of import quotas and customs dues of EUR 75 per tonne on bananas from the South American countries that are practically the sole suppliers of Eastern Europe. Annual consumption in Poland, the leading banana importer among the new members, decreased from 7.4 kg per person per year in 1998 to 5.5 kg in 2009.

The market regulations for imports of other fruits—mainly citrus—did not change but imports have decreased too. International operators had great expectations and thought that EU membership of the Eastern countries would increase the volume of the fruit trade and consumption, in particular as a result of increased purchasing power.

The Eastern European countries nevertheless have substantial development potential. The population of 300 million means substantial scope for consumption. In addition, economic dynamism has been strong in spite of the downturn and purchasing power is increasing steadily. Finally, the large difference of fruit consumption between East and West leads to considering that there is considerable room for progress.



### What slows the consumption of citrus and tropical fruits in the East?

The first factor is the low level of purchasing power in the East. Per capita GDP was EUR 10 300 in 2009 (CIA World Factbook), 57% less than EU-15 (EUR 24 000) and very variable from one country to another—EUR 4 600 in Ukraine to EUR 20 100 in Slovenia.

However, GDP in the zone increased strongly from 2000 to 2008, averaging + 5.7% per year in comparison with + 2.1% in EU-15. In spite of the impact of the downturn in 2009-10, the Eastern European countries should achieve faster growth than that of EU-15 in 2011 at an average of + 3% against + 1.4% (Eurostat estimate).

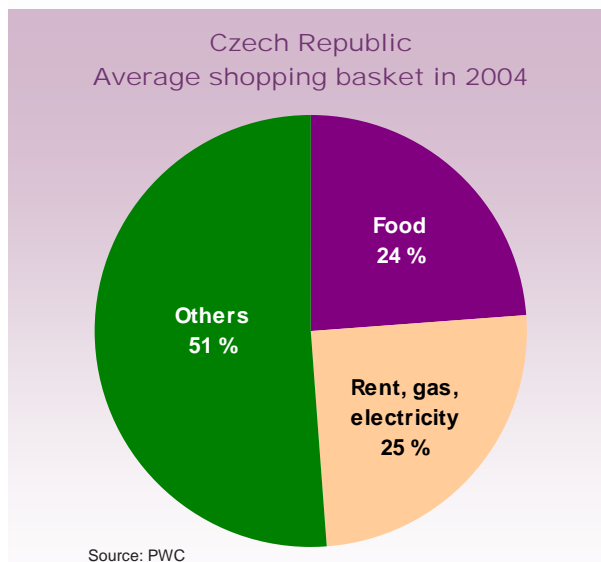
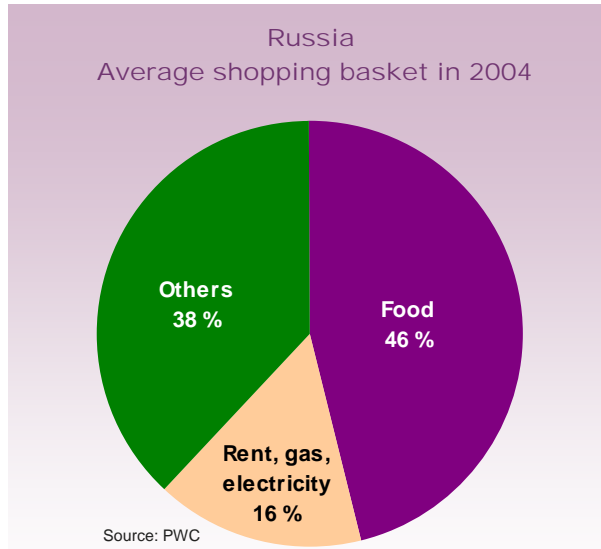
These countries form three zones as regards GDP. The 'richest' one consists of the countries more to the west, from Poland to Croatia. Per capita GDP averages some EUR 15 000, similar to that of Portugal (EUR 15 800) the poorest of the EU-15 countries. The northern zone consisting of the Baltic region and Russia has an average per capita GDP of EUR 10 800. Although it was harder hit by the downturn, it had also displayed the strongest growth prior to the slump. The southern zone runs from Belarus to Bulgaria and the per capita GDP is a third of that of EU-15.

### Local fruits versus imported fruits

The standard of living of the population of a country does not necessarily explain fruit import volumes. Indeed, although they have a fairly similar GDP, the Czech Republic imports twice the quantity of fruits (26 kg per person per year) as Hungary (11.5 kg per person per year). A second factor—the production of competing fruits—should be considered. This means temperate fruits grown locally and these are in three categories: pip fruits (apples and pears), stone fruits (peaches, apricots and cherries) and berries (mainly strawberries). Pip fruits are generally cheaper and available on the market at competitive prices for about nine

Comparison Poland-Slovakia		
	Poland	Slovakia
Population	38 millions	5.5 millions
Apple production	2 500 000 t	29 700 t
processed apples	1 300 000 t	-
Stone fruit production	350 000 t	5 100 t
Berry production	270 000 t	650 t

Source: official statistics



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months, from August to April. Berries and stone fruits are cropped from May to August but their prices are usually higher. Fruit production varies considerably within Eastern Europe. Bulgarian production is only 12 kg per person per year while the figure in Hungary is about 53 kg. Apples are the main domestically grown fruit in the zone, with intensive production in central Europe. Poland is the leading producer country in Europe with an annual crop of 2.5 million tonnes. It is followed by Belarus and Hungary.

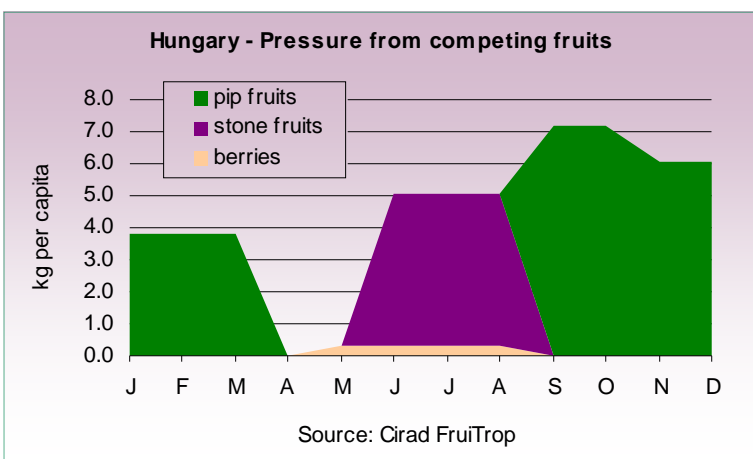
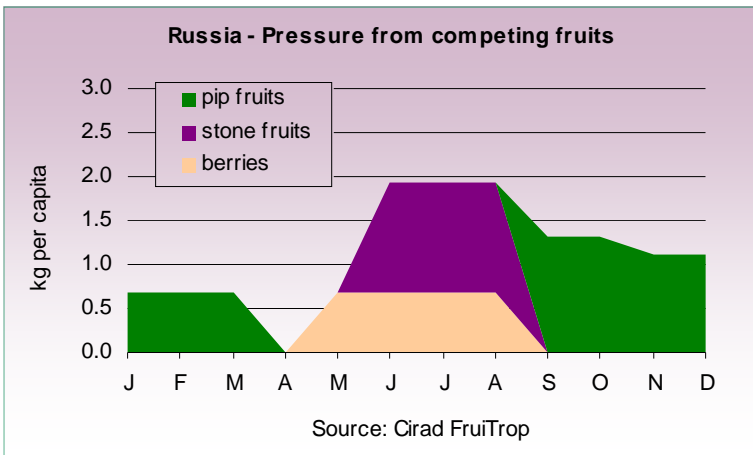
Consumption figures are for fresh fruits after deduction of the quantities processed. However, the latter should be taken into account as they form a source of cheap fruits that can be sold on the fresh fruit market if conditions are favourable.

Home and on-farm consumption is also a factor to be examined but it is difficult to estimate. It concerns vegetables above all in Eastern Europe and home-grown fruits can be ignored for most households.

Locally grown fruits have a strong effect on purchases of imported fruits. The former are more readily available and do not require complicated logistics. They also have a 'local produce' image that has been much emphasised in recent years. The most important point is that prices are much lower than those of imported fruits.

### Disparity in prices and distribution modes

The retail price is the main criterion in fruit purchase decisions in Eastern European countries. The price of a fruit depends first of all on whether it is an import or domestic production. The prices of common fruits in producer countries like Poland and Hungary are much lower than those of imported produce. The average price of apples was less than 50% of that of bananas. It will thus be difficult to sell imported fruits—especially citrus and tropical fruits—in these countries, especially during harvest periods. In comparison, the prices of the main fruits (apples, bananas and oranges) purchased in Eastern European countries that depend almost entirely on imports, such as Russia and the Czech Republic, are more similar. Some tropical fruits like banana may even be cheaper than temperate fruits, as in Russia for example where bananas were 28% cheaper than apples in 2009.



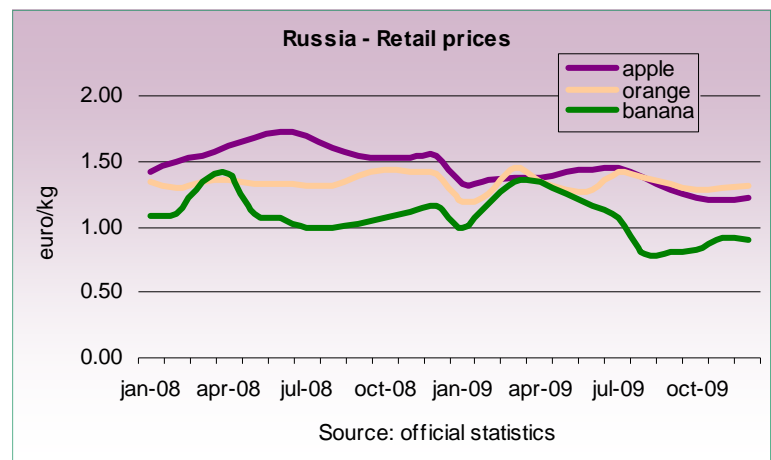
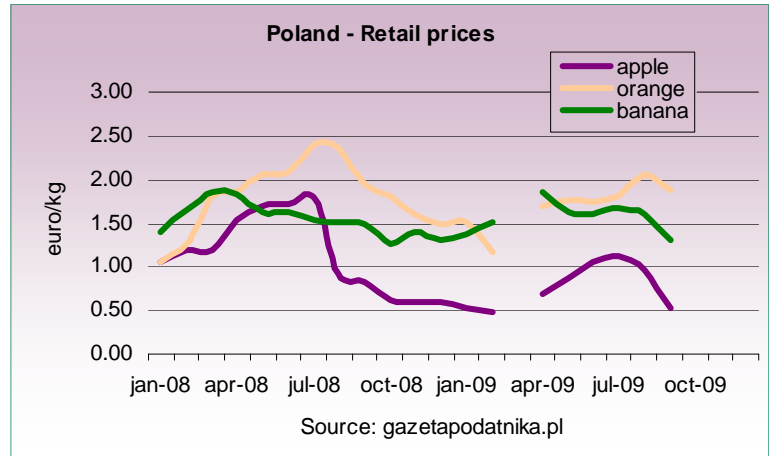
Distribution in Eastern Europe is fairly broad-ranged according to the type and size of shops.

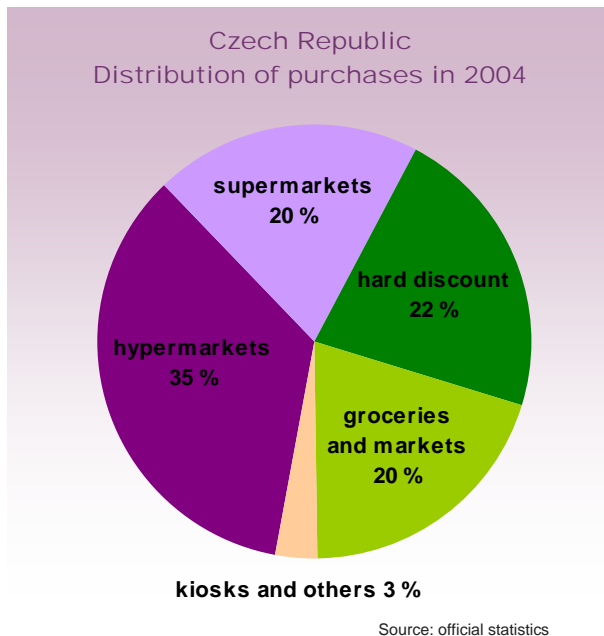
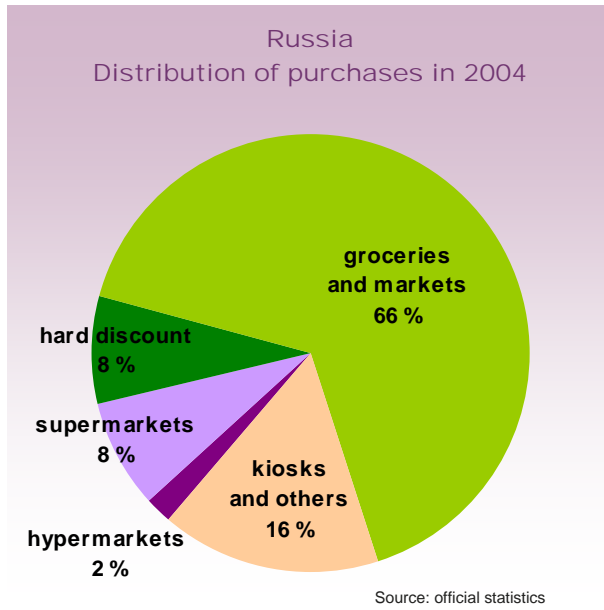
The closer the distribution system in a country to a modern western type system, the easier it will be for an exporter to penetrate the market using the supply system set up by supermarkets. With their purchase centre system, supermarkets enable importers to limit the number of clients while increasing the number of retail clients reached. Traditional markets tend to sell local produce while supermarkets cater for a category of customers more likely to be interested in imported fruits. They also have more facilities for communication and the presentation of new products through promotion operations and advertising campaigns. Retail distribution in some countries such as the Czech Republic and Hungary is very similar to the western model, dominated by large retail outlets (supermarkets, superstores and discount stores) often funded by western capital. This has modelled the habits of purchasers, most of whom shop once a week in centres at urban peripheries.

Other countries have traditional retail structures that hinder the setting up of fruit import chains. Markets and kiosks are dominant in retailing in Belarus and Ukraine and people buy food five or six times a week. Distribution is becoming westernised rapidly in Poland and Russia with the establishment of large international groups (Tesco, Lidl, Carrefour, Metro, etc.) in large urban centres. Here, there are great differences in behaviour between city-dwellers and country people as the latter have hardly changed their shopping habits.

### A non-negligible 'country' risk

Failure to pay is an inherent risk in any commercial transaction. The risk is higher when a country is unstable politically and economically. The risk may be a serious obstacle to the establishment of a trade chain in a given country as the establishment of medium term prospects is impossible. Companies cannot obtain insurance cover in what are considered to be high-risk countries. Some exporting countries are not developing shipments to the Eastern European markets because of the risk of bad debts. On this point it is interesting to note the organisation of Turkish exporting companies, especially in Russia. Indeed, their family structure and strong downstream integration makes it possible to ensure payment on these markets where debt recovery is still a major problem. In spite of the efforts made for several years, corruption problems are still





seen in certain countries such as Romania, Bulgaria and Ukraine. Belarus is somewhat special with a very high 'country' risk for short and medium term investments as the regime is not democratic, making it difficult to set up a fruit import chain. Every sector must adapt its sales method in order to limit risks.

### An eldorado all the same

In spite of all the obstacles resulting from low GDPs, competing fruits and the type of retail distribution, the strong economic dynamics of the Eastern European countries and the scope for increasing fresh fruit consumption make these markets excellent targets for fruit exporters in the future. However, supply should be segmented to match the specific requirements of markets that are in fact very varied. Their expectations in terms of range breadth and depth and prices must be examined very precisely. The more interesting markets have vast sales potential and moderate pressure from local fruits. This is the case of Russia which has enormous potential for increasing per capita consumption as the population is 142 million and fruits supplies—both temperate and tropical—are mainly imported as local supply is small. Retail prices for the main fruits purchased are therefore comparable and so sales of some tropical fruits such as bananas have increased rapidly. Oranges and easy peelers might be the next fruits to benefit from the Russians love of fruit.

Other markets like Belarus and Romania have large populations and considerable scope for growth but limits might be set by their low GDP and the very strong impact of locally grown fruits sold at low prices.



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In spite of a fairly high standard of living, certain markets have limited growth potential as their populations are small (the Baltic countries, Slovenia and Croatia).

The graph below shows which countries have the best potential for imports of tropical fruits (bananas and exotic fruits) and citrus. The vertical axis represents fruit production in the country and the higher it is the more difficult it would be to import fruits. The horizontal axis represents per capita GDP. The higher the GDP the faster the development of imports. The size of each circle represents potential consumption calculated by multiplying the population of the country by the difference between its consumption and that of EU-15. For example, the difference in consumption

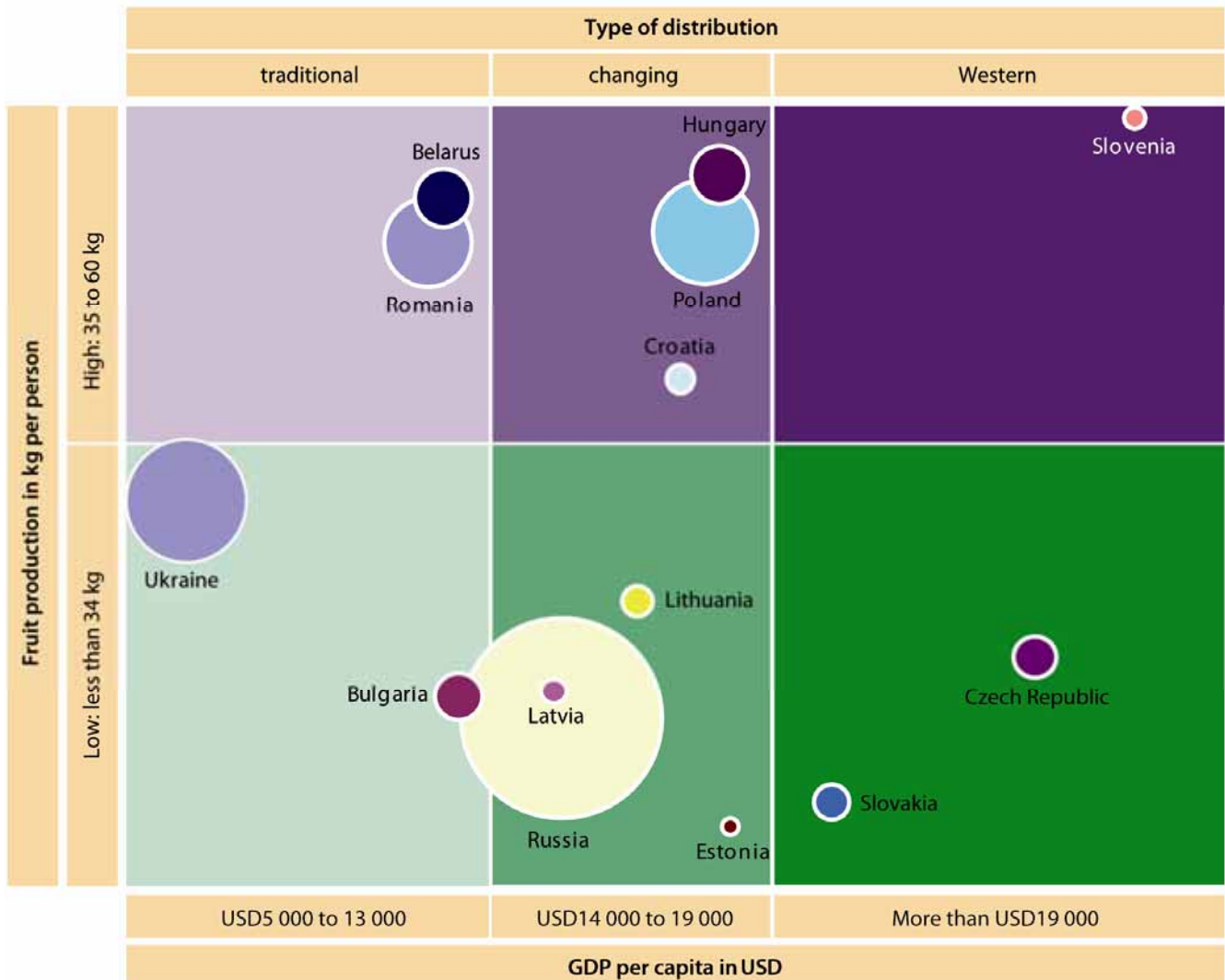
between Russia and EU-15 is 16 kg per person per year. Given its population, the scope for increase in sales in Russia is 3.6 million tonnes.

Per capita GDP is strongly correlated with the type of retail distribution. The higher the GDP, the more western the style of distribution. This also means that a high GDP makes possible a broad range of produce and with price being less of a primordial factor.

Production sources should therefore match quality, range and price to each type of market ■

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### Eastern Europe - Estimated potential consumption of citrus and tropical fruits (banana and exotics) by country



Note: the size of each circle represents the potential consumption in each country. It was calculated by multiplying the population by the difference between its consumption and that of EU-15. Sources: Eurostat, official statistics / Processing: CIRAD-Fruitrop / Graphics: Chez Vincent

# EASTERN EUROPE MARKET SHEETS

# BALTIC

The three Baltic countries **Estonia**, **Latvia** and **Lithuania** have the same profile: a fairly small population and small fruit production for reasons of unfavourable climate. The development of supermarkets is lagging behind that in other countries as the small populations make these markets less attractive to multinationals. Exotic fruit imports per capita is smaller than the average for Eastern Europe.



The retail system consists mainly of small neighbourhood shops although supermarkets are becoming established little by little.

**Population (2009):** 6.8 million  
**Area:** 175 000 km<sup>2</sup>  
**Capitals:** Tallinn (Estonia), Riga (Latvia), Vilnius (Lithuania)  
**Population trend from 2000 to 2008:** - 4.67‰  
**Per capita GDP (2009):** EUR 12 000  
**GDP/PPP (purchasing power parity):** 62.2 (base 100: EU)



Baltic countries — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 7.77	+ 9.27	+ 10.00	+ 9.00	- 1.80	- 15.70

Baltic countries — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Distribution being modernised rapidly. Small competing fruit production.	Comparatively small population.
<b>External</b>	Seaboard.	

Baltic countries — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Baltic States kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	54 483	4 045	+ 63	+ 173	13 071	+ 153	6.68	11.67	Germany France Belgium	Finland
Orange	-	-	15 539	23 401	- 59	+ 830	13 467	+ 66 525	3.75	15.01	Spain Egypt	Finland Belarus
Easy peelers	-	-	40 258	3 988	+ 77	+ 30 937	20 700	+ 548	3.46	6.20	Spain Italy	Russia
Lemon	-	-	11 250	4 199	+ 121	+ 228	5 628	+ 8 023	1.44	3.14	Netherlands Turkey Spain	Finland Russia
Grapefruit	-	-	7 714	7 554	+ 140	+ 11 315	4 583	+ 5 934	1.57	0.87	Netherlands Israel	Finland Russia
<b>Total citrus</b>	-	-	<b>74 761</b>	<b>39 142</b>	<b>+ 65</b>	<b>+ 6 306</b>	<b>44 378</b>	<b>+ 36 710</b>	<b>10.22</b>	<b>25.21</b>	<b>Netherlands Spain Italy</b>	<b>Finland Russia</b>
Pineapple	-	-	9 056	154	+ 263	+ 609	5 404	+ 2 139	0.56	1.90	Netherlands Belgium	Finland Russia
Mango	-	-	1 611	2	+ 22	-	1 275	+ 378	0.05	0.47	Netherlands	Russia
Avocado	-	-	2 582	-	+ 442	-	1 354	+ 698	0.18	0.76	Netherlands	Russia
<b>Total exotics</b>	-	-	<b>13 249</b>	<b>156</b>	<b>+ 242</b>	<b>-</b>	<b>8 032</b>	<b>+ 1 072</b>	<b>0.79</b>	<b>3.13</b>	<b>Italy Netherlands</b>	<b>Russia</b>
Kiwi	-	-	16 047	251	+ 125	-	11 744	+ 918	0.67	1.82	Netherlands Italy	Finland Russia
Apple	91 223	35 016	107 951	287	- 22	+ 1 095	81 967	- 202	12.09	20.37	Poland Netherlands	Russia
Pear	-	-	19 244	801	+ 39	+ 647	11 386	+ 139	1.27	6.41	Netherlands	Russia
Berries	14 894	-	9 137	565	+ 18	-	3 518	- 58	3.10	2.65	Poland Netherlands	Russia
Stone fruits	3 089	-	40 555	229	+ 31	-	27 330	+ 14	2.43	13.34	Spain	Finland Russia
Grapes	-	-	30 022	3 867	- 10	+ 34	18 180	+ 216	2.31	7.17	Netherlands Italy	Russia

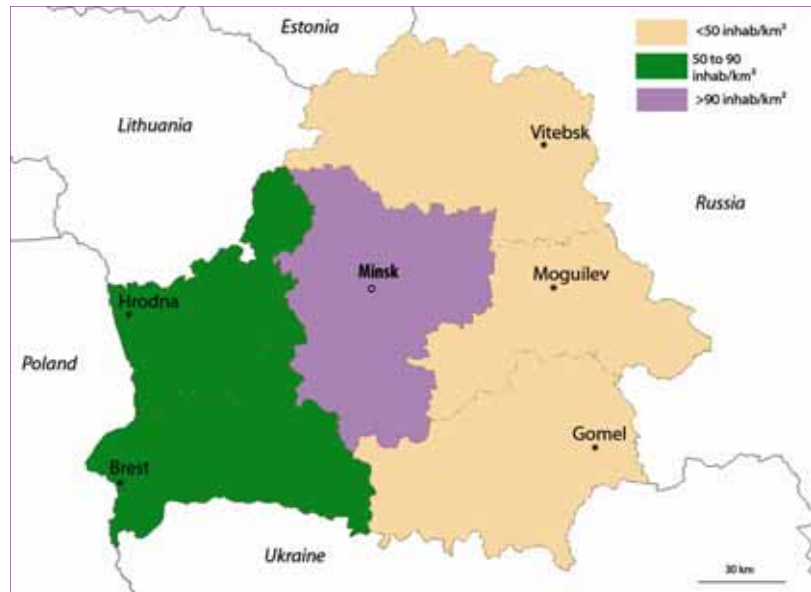
Source: EUROSTAT, FAO, professionals

# BELARUS

Belarus features a low standard of living, large pip fruit production and practically no supermarkets. Sales of imported fruits are fairly unlikely to increase in the short term. The notion of price is the main criterion of choice as regards food. It is very difficult for foreign companies to set up in Belarus.



There is no modern distribution system. Practically all food purchases are in neighbourhood shops or state stores.



**Population (2009):** 9.5 million  
**Area:** 200 000 km<sup>2</sup>  
**Capital:** Minsk (1.7 million)  
**Population trend:** + 0.4‰ in 2008  
**Per capita GDP (2009):** EUR 8 800  
**GDP/PPP (purchasing power parity):** 32.2 (base 100: EU)

Belarus — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Average consumption potential.	Large competing fruit production. Low GDP.
<b>External</b>		Non-democratic state. High risk of bad debts. No seaboard.

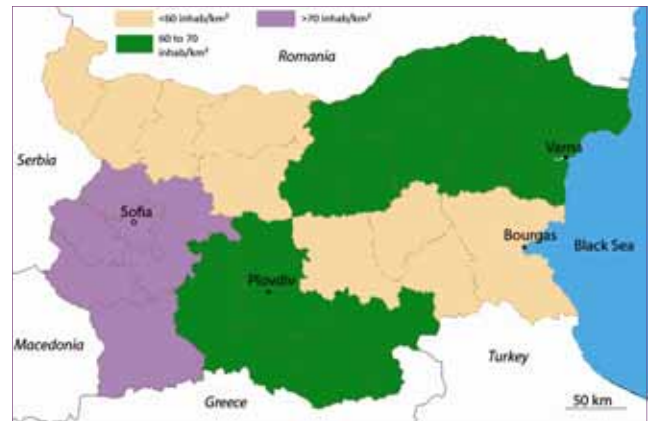
Belarus — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 12.00	+ 2.60	+ 7.10	+ 7.30	+ 2.10	-

Belarus — Fruit market panorama											
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers	
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Belarus kg/cap/year	EU-15 kg/cap/year			
<b>Banana</b>	-	-	28 097	+ 89.3	-	-	2.96	11.67	Ecuador	-	
Orange	-	-	53 159	+ 58.5	-	-	5.60	15.01	Morocco	-	
Easy peelers	-	-	0	-	-	-	0.00	6.20	-	-	
Lemon	-	-	7 934	+ 63.3	-	-	0.84	3.14	Turkey	-	
Grapefruit	-	-	4 675	+ 185.8	-	-	0.49	0.87	Turkey	-	
<b>Total citrus</b>	-	-	<b>65 768</b>	<b>+ 68.1</b>	-	-	<b>6.92</b>	<b>25.21</b>	<b>Morocco</b>	-	
Pineapple	-	-	1 249	+ 85.9	-	-	0.13	1.90	Côte d'Ivoire	-	
Mango	-	-	70	+ 20.7	-	-	0.01	0.47	Brazil	-	
Avocado	-	-	91	+ 203.3	-	-	0.01	0.76	Israel	-	
<b>Total exotics</b>	-	-	<b>1 410</b>	<b>+ 103.3</b>	-	-	<b>0.15</b>	<b>3.13</b>	<b>Italy</b>	-	
Kiwi	-	-	3 653	+ 70.9	-	-	0.38	1.82	-	-	
<b>Apple</b>	<b>321 369</b>	-	<b>89 989</b>	<b>+ 38.1</b>	<b>3 672</b>	<b>- 50.5</b>	<b>42.91</b>	<b>20.37</b>	<b>Moldavia</b>	<b>Russia</b>	
Pear	48 283	-	8 660	+ 132.4	30	- 71.7	5.99	6.41	Netherlands	Russia	
<b>Berries</b>	<b>46 100</b>	-	<b>322</b>	<b>- 63.8</b>	<b>13</b>	<b>+ 44.4</b>	<b>4.89</b>	<b>2.65</b>	<b>Poland</b>	<b>Russia</b>	
<b>Stone fruits</b>	<b>87 040</b>	-	<b>14 455</b>	<b>- 4.8</b>	<b>19</b>	<b>- 95.0</b>	<b>10.68</b>	<b>13.34</b>	<b>Moldavia</b>	<b>Russia</b>	
Grapes	-	-	19 129	+ 84.7	-	- 100.0	2.01	7.17	Moldavia	-	

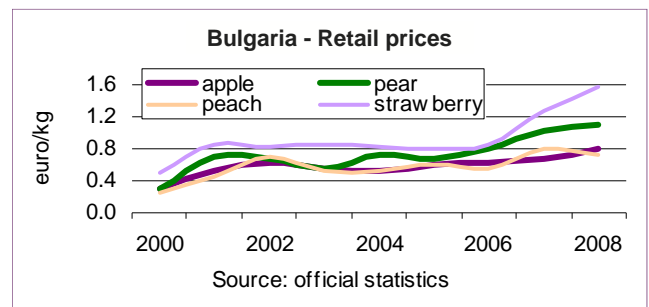
Source: EUROSTAT, FAO, professionals

# BULGARIA

Bulgarian fruit production and imports are modest, running below the per capita average for Eastern Europe. Apparent consumption of fruits is therefore small, leading to considering that there is distinct scope for improvement as regards imported fruits. Supermarkets are little developed.



**Population (2009):** 7.2 million  
**Area:** 111 000 km<sup>2</sup>  
**Capital:** Sofia (1.2 million)  
**Population trend from 2000 to 2008:** - 8.73%  
**Per capita GDP (2009):** EUR 9 000  
**GDP/PPP (purchasing power parity):** 41.3 (base 100: EU)



Bulgaria — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 6.60	+ 6.20	+ 6.30	+ 6.20	+ 6.00	- 5.00

Bulgaria — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Small production of competing fruits.	Low GDP. Traditional distribution. Moderate scope for increased consumption.
<b>External</b>	Access by sea.	Ports little developed.

Bulgaria — Retail Sales distribution in 2006 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
0.3	18.4	0.1	61.7	19.5

Bulgaria — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Bulgaria kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
<b>Banana</b>	-	-	22 776	14 817	-	-70	276	+ 1 098	5.2	11.7	Ecuador Italy Greece	Greece Romania
Orange	-	-	11 016	7 385	- 37	+ 18	2 136	+ 9 395	2.3	15.0	Greece Turkey	Romania Lithuania
Easy peelers	-	-	9 804	9 153	+ 21	0	1 550	+ 26 626	2.4	6.2	Turkey Grece	Romania Russia
Lemon	-	-	1 694	20 505	+ 513	+ 84	3 686	+ 18 330	2.6	3.1	Turkey	Romania Lithuania
Grapefruit	-	-	842	11 528	+ 2 076	+ 109	2 269	+ 34 271	1.4	0.9	Turkey	Romania
<b>Total citrus</b>	-	-	<b>23 356</b>	<b>48 570</b>	<b>+ 104</b>	<b>+ 64</b>	<b>9 641</b>	<b>+ 21 435</b>	<b>8.7</b>	<b>25.2</b>	<b>Turkey</b>	<b>Romania</b>
Pineapple	-	-	625	9	-	- 98	1	- 87	0.1	1.9	Netherlands	Romania
Mango	-	-	51	0	+ 745	-	5	+ 160	0.0	0.5	Netherlands	Italy
Avocado	-	-	101	0	+ 332	-	0	-	0.0	0.8	Netherlands	-
<b>Total exotics</b>	-	-	<b>777</b>	<b>9</b>	<b>+ 539</b>	<b>- 98</b>	<b>6</b>	<b>+ 36</b>	<b>0.1</b>	<b>1.8</b>	-	-
Kiwi	-	-	3 983	0	0	-	2 228	+ 556	0.2	1.8	Greece	Russia
<b>Apple</b>	<b>24 833</b>	<b>16 135</b>	<b>7 377</b>	<b>10 621</b>	<b>- 55</b>	<b>- 48</b>	<b>336</b>	<b>+ 537</b>	<b>3.7</b>	<b>20.4</b>	<b>Macedonia</b>	<b>Poland Greece</b>
Pear	983	-	1 018	247	+ 2	- 48	10	+ 5	0.3	6.4	Greece	-
<b>Berries</b>	<b>10 993</b>	-	<b>1 393</b>	<b>390</b>	<b>+ 770</b>	<b>+ 2 414</b>	<b>1 573</b>	<b>+ 3 065</b>	<b>1.6</b>	<b>2.7</b>	<b>Greece</b>	<b>Russia Greece</b>
<b>Stone fruits</b>	<b>69 373</b>	-	<b>2 767</b>	<b>2 823</b>	<b>- 43</b>	<b>+ 39</b>	<b>2 437</b>	<b>+ 521</b>	<b>10.1</b>	<b>13.3</b>	<b>Greece</b>	<b>Russia Ukraine</b>
Grapes	15 750	-	2 038	1 120	- 14	- 82	698	+ 10 477	2.5	7.2	Greece	Lithuania

Source: EUROSTAT, FAO, professionals

# CROATIA

Croatia is a small country but a large fruit producer. Thanks to its position and history, it has many trade links with the other former Yugoslav countries. Strong pressure from competing fruits and a medium GDP indicate that there is little potential for the development of imported fruits.



Modern retail distribution is fairly well developed and Konzum, a Croatian chain, dominates the market. The rest of modern retailing consists of cash & carry outlets and discount stores.

**Population (2009):** 4.5 million  
**Area:** 57 000 km<sup>2</sup>  
**Capital:** Zagreb (0.8 million)  
**Population trend from 2000 to 2008:** - 9.53‰  
**Per capita GDP (2009):** EUR 12 700  
**GDP/PPP (purchasing power parity):** 67.2 (base 100: EU)



Croatia — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 4.20	+ 4.20	+ 4.70	+ 5.50	+ 2.40	- 5.80

Croatia — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Medium GDP and retail distribution modernising rapidly.	Small consumption resources. Large production of competing fruits.
<b>External</b>	Good access by sea.	

Croatia — Fruit market panorama											
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers	
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Croatia kg/cap/year	EU-15 kg/cap/year			
Banana	-	-	54 737	+ 7.5	20	- 80.4	12.16	11.67	Ecuador	Switzerland	
Orange	555	-	35 433	+ 29.9	20 465	+ 51.0	3.45	15.01	Greece	Slovenia	
Easy peelers	43 000	-	0	-	0	-	9.56	6.20	-	-	
Lemon	1 000	-	12 161	+ 2.2	56	+ 273.3	2.91	3.14	Spain	Slovenia	
Grapefruit	0	-	3 087	+ 47.2	0	-	0.69	0.87	Turkey	-	
<b>Total citrus</b>	<b>44 555</b>	<b>-</b>	<b>50 681</b>	<b>+ 24.3</b>	<b>20 521</b>	<b>+ 51.6</b>	<b>16.60</b>	<b>25.21</b>	<b>Spain</b>	<b>Slovenia</b>	
Pineapple	-	-	1 633	+ 171.3	0	- 100.0	0.36	1.90	Costa Rica	-	
Mango	-	-	86	+ 62.3	0	-	0.02	0.47	Brazil	-	
Avocado	-	-	53	+ 55.9	0	-	0.01	0.76	South Africa	-	
<b>Total exotics</b>	<b>-</b>	<b>-</b>	<b>1 772</b>	<b>+ 96.5</b>	<b>3</b>	<b>- 70.0</b>	<b>0.39</b>	<b>3.13</b>	<b>Italy</b>	<b>-</b>	
Kiwi	-	-	3 412	+ 64.1	3	- 1	0.76	1.82	-	-	
<b>Apple</b>	<b>76 587</b>	<b>-</b>	<b>14 392</b>	<b>- 32.4</b>	<b>20 684</b>	<b>+ 617.2</b>	<b>15.62</b>	<b>20.37</b>	<b>Slovenia</b>	<b>Bosnia</b>	
Pear	8 636	-	7 820	+ 51.7	0	- 100.0	3.66	6.41	Italy	-	
<b>Berries</b>	<b>3 918</b>	<b>-</b>	<b>746</b>	<b>- 1.5</b>	<b>7</b>	<b>+ 16.7</b>	<b>1.03</b>	<b>2.65</b>	<b>Bosnia</b>	<b>-</b>	
<b>Stone fruits</b>	<b>86 421</b>	<b>-</b>	<b>12 877</b>	<b>- 4.9</b>	<b>163</b>	<b>+ 129.6</b>	<b>22.03</b>	<b>13.34</b>	<b>Italy</b>	<b>Slovenia</b>	
Grapes	-	-	10 614	- 3.5	0	- 100.0	2.36	7.17	Italy	-	

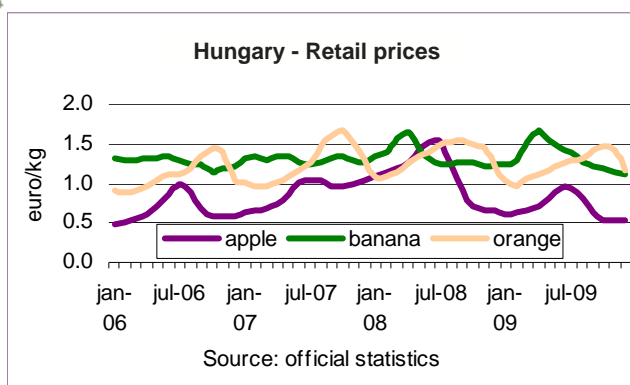
Source: EUROSTAT, FAO, professionals

# HUNGARY

Hungary is a large temperate fruit producer and a central position among the Eastern European countries. Fruit imports are difficult as the produce is more expensive than local production and not competitive. Per capita imports of citrus and bananas are among the smallest of the Eastern European countries, leading to supposing that there is considerable scope for progress. Furthermore, retailing is becoming increasingly west-ernised and concentrated and the standard of living is rising. Growth should be substantial in the imported fruits sector.



**Population (2009):** 10.0 million  
**Area:** 93 000 km<sup>2</sup>  
**Capital:** Budapest (1.7 million)  
**Population trend from 2000 to 2008:** - 2.10‰  
**Per capita GDP (2009):** EUR 13 300  
**GDP/PPP (purchasing power parity):** 64.4 (base 100: EU)



Hungary — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 4.90	+ 3.50	+ 4.00	+ 1.00	+ 0.60	- 6.30

Hungary — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
27	14	24	28	7

Hungary — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Small consumption of imported fruits. Modern distribution structure.	Competing fruits at competitive prices.
<b>External</b>		No ports. Fruit must be carried by road.

Hungary — Fruit market panorama													
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers	
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Hungary kg/cap/year	EU-15 kg/cap/year			
			intra	extra	intra	extra							
<b>Banana</b>	-	-	89 145	0	+ 55	- 100	37 493	+ 23 949	5.2	11.7	Belgium Germany	Romania Slovakia	
Orange	-	-	26 728	1 034	- 8	+ 1	2 131	-	2.6	15.0	Greece Spain	Slovakia Romania	
Easy peelers	-	-	12 783	1 763	- 49	- 9	542	- 43	1.4	6.2	Spain Germany	Slovakia	
Lemon	-	-	8 076	5 660	- 25	- 15	2 306	-	1.1	3.1	Italy	Germany	
Grapefruit	-	-	1 641	3 133	+ 24	- 39	0	- 100	0.5	0.9	Turkey	-	
<b>Total citrus</b>	-	-	<b>49 228</b>	<b>11 589</b>	<b>- 20</b>	<b>- 19</b>	<b>4 978</b>	<b>-</b>	<b>5.6</b>	<b>25.2</b>	<b>Spain</b>	<b>Slovakia</b>	
Pineapple	-	-	3 399	6	+ 64	- 76	6	- 86	0.3	1.9	Czech Rep. France	-	
Mango	-	-	517	2	+ 6	- 70	0	- 100	0.1	0.5	Netherlands	-	
Avocado	-	-	250	0	- 17	-	0	-	0.0	0.8	Spain	-	
<b>Total exotics</b>	-	-	<b>4 165</b>	<b>8</b>	<b>+ 17</b>	<b>- 73</b>	<b>6</b>	<b>- 93</b>	<b>0.4</b>	<b>1.8</b>	<b>-</b>	<b>-</b>	
Kiwi	-	-	3 473	0	0	-	0	- 1	0.3	1.8	Italy	-	
<b>Apple</b>	<b>553 300</b>	<b>191 134</b>	<b>8 664</b>	<b>130</b>	<b>-</b>	<b>-</b>	<b>23 085</b>	<b>- 51</b>	<b>34.8</b>	<b>20.4</b>	<b>Austria</b>	<b>Austria</b>	
Pear	16 900	0	2 136	-	- 62	-	215	- 56	1.9	6.4	Netherlands	Finland	
<b>Berries</b>	<b>11 889</b>	<b>-</b>	<b>1 082</b>	<b>183</b>	<b>-</b>	<b>-</b>	<b>531</b>	<b>- 22</b>	<b>1.3</b>	<b>2.7</b>	<b>Austria</b> <b>Netherlands</b>	<b>Austria</b>	
<b>Stone fruits</b>	<b>142 469</b>	<b>0</b>	<b>6 284</b>	<b>718</b>	<b>- 45</b>	<b>-</b>	<b>29 541</b>	<b>+ 36</b>	<b>12.0</b>	<b>13.3</b>	<b>Italy</b>	<b>Austria</b>	
Grapes	13 850	-	4 550	59	- 52	- 89	685	- 85	1.8	7.2	Italy	Czech Rep.	

Source: EUROSTAT, FAO, professionals

# POLAND



Europe's leading apple producer, Poland is also an important player in apple processing and exports. Poland is the largest importer of fruits in the eastern part of the EU and the third largest market after Russia and Ukraine. The standard of living is higher, giving the market strong potential for fruit imports. Food retailing is changing rapidly and many supermarkets are being opened (+ 15 % from 2006 to 2007).

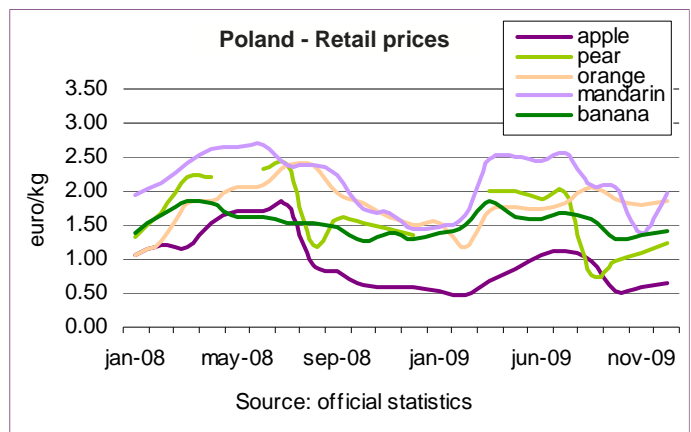
**Population (2009):** 38.0 million  
**Area:** 312 000 km<sup>2</sup>  
**Capital:** Warsaw (1.7 million)  
**Population trend from 2000 to 2008:** - 1.56‰  
**Per capita GDP (2009):** EUR 13 800  
**GDP/PPP (purchasing power parity):** 56.4 (base 100: EU)



Poland — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 5.30	+ 3.60	+ 6.20	+ 6.80	+ 5.00	+ 1.70

Poland — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
20	17	17	37	9

Poland — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Large consumption potential. Retail distribution being modernised.	Very large production of fruits sold at low prices.
<b>External</b>	Seaboard. Developed ports.	



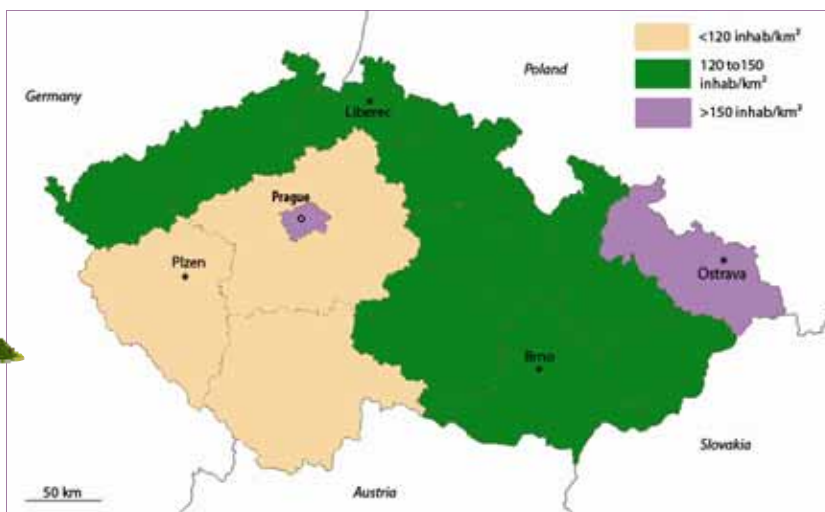
Poland — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Poland kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
<b>Banana</b>	-	-	185 656	34 382	+ 8	- 44	10 310	- 54	5.5	11.7	Belgium Germany	Germany
Orange	-	-	116 210	1 972	+ 21	+ 53	6 338	- 7	2.9	15.0	Spain	Ukraine
Easy peelers	-	-	138 206	4 083	- 10	+ 11	22 430	+ 97	3.2	6.2	Spain	Ukraine
Lemon	-	-	82 679	21 929	+ 2	+ 9	8 410	+ 62	2.5	3.1	Spain	Ukraine
Grapefruit	-	-	32 911	10 382	+ 108	- 29	1 367	+ 251	1.1	0.9	Netherlands Germany	Belarus
<b>Total citrus</b>	-	-	<b>370 006</b>	<b>38 366</b>	<b>+ 13</b>	<b>+ 1</b>	<b>38 545</b>	<b>+ 78</b>	<b>9.7</b>	<b>25.2</b>	<b>Spain</b>	<b>Ukraine</b>
Pineapple	-	-	9 549	131	+ 6	- 55	2 445	- 19	0.2	1.9	Netherlands	Ukraine
Mango	-	-	1 839	4	- 28	- 32	287	+ 132	0.0	0.5	Netherlands	Ukraine
Avocado	-	-	2 114	-	+ 39	-	294	+ 302	0.0	0.8	Netherlands	Ukraine
<b>Total exotics</b>	-	-	<b>13 502</b>	<b>135</b>	<b>+ 6</b>	<b>- 44</b>	<b>3 026</b>	<b>+ 138</b>	<b>0.3</b>	<b>1.8</b>	-	-
Kiwi	-	-	32 995	94	0	- 1	9 739	0	0.6	1.8	Italy	Ukraine
<b>Apple</b>	<b>2 567 881</b>	<b>1 344 000</b>	<b>20 923</b>	<b>79</b>	<b>- 2</b>	<b>- 59</b>	<b>747 774</b>	<b>+ 88</b>	<b>13.1</b>	<b>20.4</b>	<b>Netherlands</b>	<b>Russia Ukraine</b>
Pear	66 055	0	14 496	117	+ 17	- 49	19 292	+ 485	1.6	6.4	Netherlands	Russia Ukraine
<b>Berries</b>	<b>270 640</b>	<b>0</b>	<b>3 860</b>	<b>1 645</b>	<b>- 33</b>	<b>-</b>	<b>48 756</b>	<b>+ 1</b>	<b>6.0</b>	<b>2.7</b>	<b>Spain</b>	<b>Germany Russia</b>
<b>Stone fruits</b>	<b>353 587</b>	<b>0</b>	<b>98 730</b>	<b>388</b>	<b>+ 24</b>	<b>-</b>	<b>65 134</b>	<b>+ 43</b>	<b>10.2</b>	<b>13.3</b>	<b>Spain</b>	<b>Russia Ukraine</b>
Grapes	-	-	101 891	3 781	+ 6	- 40	9 154	- 27	2.5	7.2	Italy	Ukraine

Source: EUROSTAT, FAO, professionals

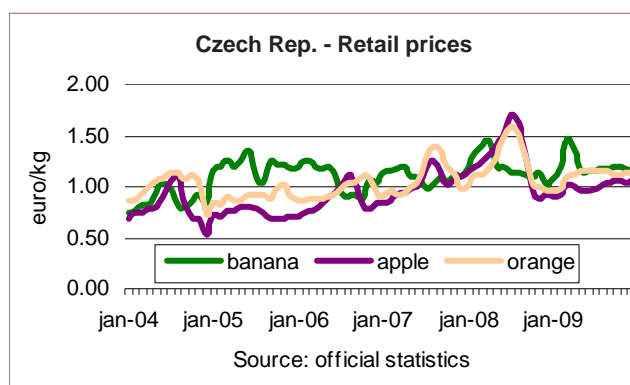


# CZECH REP.

The Czech market is very similar to that of Western European countries. Small fruit production and a comparatively high standard of living make it an attractive market for imported temperate and tropical fruits. Food distribution is by a fairly dense western style network of superstores and supermarkets. The Czech Republic is a centre for imported fruits re-shipped throughout Eastern Europe.



**Population (2009):** 10.0 million  
**Area:** 78 000 km<sup>2</sup>  
**Capital:** Prague (1.3 million)  
**Population trend from 2000 to 2008:** + 2.38%  
**Per capita GDP (2009):** EUR 18 500  
**GDP/PPP (purchasing power parity):** 80.4 (base 100: EU)



Czech Republic — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 1.90	+ 3.60	+ 6.80	+ 6.10	+ 2.50	- 4.80

Czech Republic — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
34	16	22	23	6

Czech Republic — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Modern retail distribution. High GDP. Moderate fruit production.	Moderate scope for consumption. Large imports.
<b>External</b>		No seaboard.

Czech Republic — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Czech Rep. kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
<b>Banana</b>	-	-	155 054	2 491	+ 39	- 58	34 698	+ 58	12.3	11.7	France Germany	Slovakia Romania
Orange	-	-	53 990	1 284	- 7	+ 89	7 988	- 15	4.7	15.0	Spain Greece	Slovakia
Easy peelers	-	-	44 587	3 175	- 27	- 25	7 981	- 13	4.0	6.2	Spain	Slovakia
Lemon	-	-	19 687	7 796	- 20	+ 149	3 944	+ 9	2.4	3.1	Spain Turkey	Slovakia
Grapefruit	-	-	10 745	3 680	+ 39	- 14	2 403	- 31	1.2	0.9	Netherlands Turkey	Slovakia
<b>Total citrus</b>	-	-	<b>129 009</b>	<b>15 935</b>	<b>- 12</b>	<b>+ 72</b>	<b>22 316</b>	<b>- 12</b>	<b>12.3</b>	<b>25.2</b>	<b>Spain</b>	<b>Slovakia</b>
Pineapple	-	-	10 452	1	- 3	+ 1 200	1 690	+ 4	0.9	1.9	Netherlands	Slovakia
Mango	-	-	1 920	109	- 37	+ 166	236	- 42	0.2	0.5	Netherlands	Slovakia
Avocado	-	-	489	0	- 26	-	64	+ 18	0.0	0.8	Netherlands	Slovakia
<b>Total exotics</b>	-	-	<b>12 861</b>	<b>111</b>	<b>- 22</b>	<b>+ 683</b>	<b>1 989</b>	<b>- 6</b>	<b>1.1</b>	<b>1.8</b>	-	-
Kiwi	-	-	14 691	47	0	- 1	1 886	0	1.3	1.8	Netherlands	Slovakia
<b>Apple</b>	<b>135 438</b>	-	<b>60 308</b>	-	<b>- 24</b>	-	<b>46 058</b>	<b>- 39</b>	<b>15.0</b>	<b>20.4</b>	<b>Poland Italy</b>	<b>Germany Austria</b>
Pear	2 708	-	9 613	1	+ 28	- 95	1 787	+ 42	1.1	6.4	Netherlands Italy	Slovakia Austria
<b>Berries</b>	<b>15 349</b>	-	<b>8 544</b>	<b>75</b>	<b>+ 13</b>	<b>+ 2</b>	<b>389</b>	<b>- 10</b>	<b>2.4</b>	<b>2.7</b>	<b>Italy Germany</b>	<b>Slovakia</b>
<b>Stone fruits</b>	<b>23 361</b>	-	<b>44 666</b>	<b>962</b>	<b>- 3</b>	<b>- 3</b>	<b>8 730</b>	<b>- 6</b>	<b>5.9</b>	<b>13.3</b>	<b>Italy Netherlands</b>	<b>Slovakia</b>
Grapes	-	-	50 279	739	+ 3	+ 27	5 042	+ 56	4.6	7.2	Italy	Slovakia

Source: EUROSTAT, FAO, professionals

# ROMANIA

Romanian fruit production is very large but, unlike neighbouring countries, it is divided between stone and pip fruits and this modifies mechanisms and the sales calendar. Romania's per capita imports of citrus and tropical fruits are the lowest of the Eastern European countries.



The population is large and so potential for imported fruits is substantial, even if the low prices of local produce and the low standard of living are serious obstacles.



**Population (2009):** 21.5 million  
**Area:** 239 000 km<sup>2</sup>  
**Capital:** Bucarest (2.5 million)  
**Population trend from 2000 to 2008:** - 2.00‰  
**Per capita GDP (2009):** EUR 8 500  
**GDP/PPP (purchasing power parity):** 42 (base 100: EU)

Romania — Retail				
Sales distribution in 2008 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others (+ cash & carry)
4	16	2	61	17

Romania — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 8.50	+ 4.20	+ 7.90	+ 6.30	+ 7.30	- 7.10

Romania — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Large consumption potential. Moderate imports.	Large production of fruits sold at low prices.
<b>External</b>	Good access to the sea.	Medium risk of bad debts. It is difficult to fight corruption.

Romania — Fruit market panorama													
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers	
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Romania kg/cap/year	EU-15 kg/cap/year			
			intra	extra	intra	extra							
Banana	-	-	22 958	60 022	+ 717	328	- 61	1 511	+ 6 145	3.8	11.7	Ecuador	Bulgaria
Orange	-	-	27 538	15 701	- 38	- 63	277	+ 298	2.0	15.0	Greece	Moldavia	
Easy peelers	-	-	8 539	21 683	+ 68	- 23	232	+ 160	1.4	6.2	Turkey	Bulgaria	
Lemon	-	-	4 069	18 249	+ 422	- 45	310	+ 634	1.0	3.1	Turkey	Bulgaria	
Grapefruit	-	-	3 318	24 909	+ 460	- 6	232	+ 718	1.3	0.9	Turkey	Bulgaria	
<b>Total citrus</b>	-	-	<b>43 464</b>	<b>80 541</b>	<b>+ 64</b>	<b>- 30</b>	<b>1 052</b>	<b>+ 459</b>	<b>5.7</b>	<b>25.2</b>	<b>Turkey</b>	<b>Bulgaria</b>	
Pineapple	-	-	2 075	1	+ 2 210	- 100	179	+ 4 053	0.1	1.9	Netherlands	Italy	
Mango	-	-	320	0	+ 29 000	- 100	6	+ 2 650	0.0	0.5	Netherlands	-	
Avocado	-	-	356	0	+ 1 517	-	6	+ 1 450	0.0	0.8	Netherlands	-	
<b>Total exotics</b>	-	-	<b>2 750</b>	<b>1</b>	<b>+ 10 909</b>	<b>- 100</b>	<b>190</b>	<b>+ 2 718</b>	<b>0.1</b>	<b>1.8</b>	<b>-</b>	<b>-</b>	
Kiwi	-	-	6 217	115	0	-	46	+ 2	0.3	1.8	Greece	Moldavia	
<b>Apple</b>	<b>467 193</b>	<b>96 402</b>	<b>29 429</b>	<b>2 509</b>	<b>- 41</b>	<b>- 91</b>	<b>4 759</b>	<b>+ 654</b>	<b>18.5</b>	<b>20.4</b>	<b>Poland</b>	<b>Italy</b> <b>Germany</b>	
Pear	57 714	0	4 521	2 478	- 42	+ 24	102	+ 898	3.0	6.4	Turkey	Italy	
<b>Berries</b>	<b>27 065</b>	<b>0</b>	<b>733</b>	<b>5 392</b>	<b>+ 88</b>	<b>-</b>	<b>114</b>	<b>- 87</b>	<b>1.5</b>	<b>2.7</b>	<b>Turkey</b>	<b>Germany</b>	
<b>Stone fruits</b>	<b>536 927</b>	<b>0</b>	<b>12 393</b>	<b>2 312</b>	<b>- 38</b>	<b>- 80</b>	<b>3 510</b>	<b>- 58</b>	<b>25.5</b>	<b>13.3</b>	<b>Greece</b>	<b>Moldavia</b>	
Grapes	72 000	-	9 144	4 816	- 21	- 39	147	+ 223	4.0	7.2	Italy	Italy	

Source: EUROSTAT, FAO, professionals

# RUSSIA



With a population of 142 million and continuously increasing fruit consumption, Russia is the leading market for imported fruits in terms of size and growth. Its comparatively small fruit production makes imports large, even of temperate fruits. In addition, the retail network is becoming modernised rapidly, with covered markets losing ground to supermarkets.

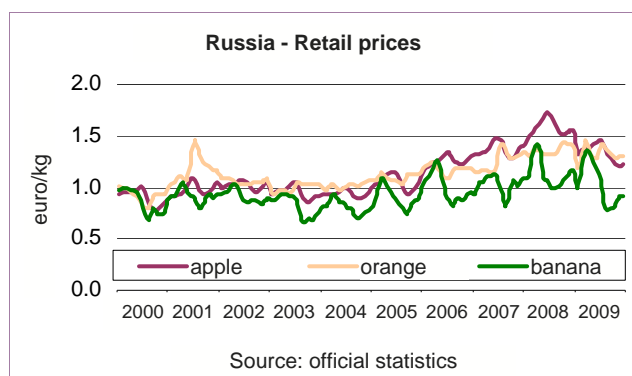
**Population (2009):** 142 million  
**Area:** 17 000 000 km<sup>2</sup>  
**Capital:** Moscow (14.4 million)  
**Population trend from 2000 to 2008:** - 4.08%  
**Per capita GDP (2009):** EUR 10 800  
**GDP/PPP (purchasing power parity):** 64.4 (base 100: EU)



Russia — GDP — in percent					
2004	2005	2006	2007	2008	2009
-	+ 6.40	+ 7.70	+ 8.10	+ 5.60	- 7.00

Russia — Retail Sales distribution in 2010 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Kiosks
12	15	21	40	12

Russia — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Very large potential consumption. Small production of competing fruits.	
<b>External</b>	Good access by sea.	Access to ports difficult in the winter.

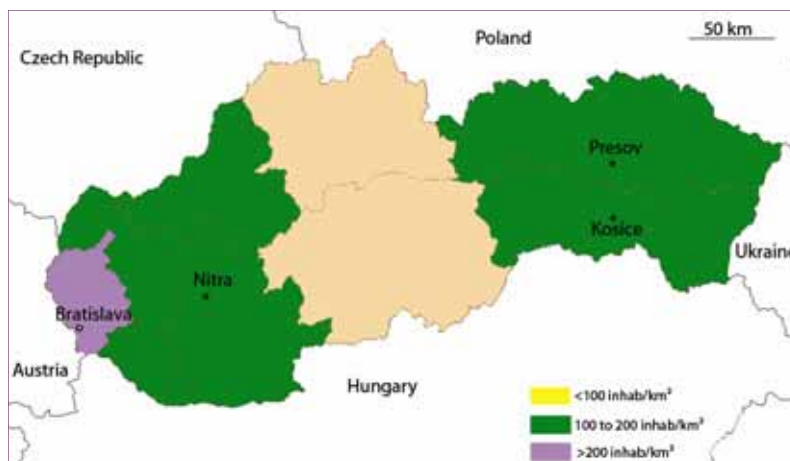


Russia — Fruit market panorama										
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Russia kg/cap/year	EU-15 kg/cap/year		
Banana	-	-	978 504	+ 14.0	19 008	+ 34.1	6.76	11.67	Ecuador	Kazakhstan
Orange	260	-	490 955	+ 23.1	15 511	+ 173.9	3.35	15.01	Egypt	Kazakhstan
Easy peelers	-	-	479 331	-	1 829	+ 894.0	3.36	6.20	Morocco	Kazakhstan
Lemon	-	-	203 911	+ 22.6	6 892	+ 162.7	1.39	3.14	Argentina	Kazakhstan
Grapefruit	-	-	84 174	+ 88.0	557	+ 596.3	0.59	0.87	Turkey	Kazakhstan
<b>Total citrus</b>	<b>260</b>	<b>-</b>	<b>1 258 371</b>	<b>+ 18.6</b>	<b>24 789</b>	<b>+ 233.4</b>	<b>8.69</b>	<b>25.21</b>	<b>Morocco</b>	<b>Kazakhstan</b>
Pineapple	-	-	33 431	+ 35.5	174	+ 176.2	0.23	1.90	Côte d'Ivoire	Georgia
Mango	-	-	4 517	+ 74.7	20	+ 566.7	0.03	0.47	Brazil	Ukraine
Avocado	-	-	4 392	+ 163.2	6	-	0.03	0.76	Israel	-
<b>Total exotics</b>	<b>-</b>	<b>-</b>	<b>42 340</b>	<b>+ 91.1</b>	<b>597</b>	<b>+ 1 256.8</b>	<b>0.30</b>	<b>3.13</b>	<b>Italy</b>	<b>Netherlands</b>
Kiwi	-	-	58 463	+ 55.2	597	+ 13.0	0.41	1.82	-	Netherlands
<b>Apple</b>	<b>1 900 000</b>	<b>1 000 000</b>	<b>931 232</b>	<b>+ 32.0</b>	<b>3 739</b>	<b>+ 62.8</b>	<b>12.87</b>	<b>20.37</b>	<b>Poland</b>	<b>Kazakhstan</b>
Pear	78 000	0	377 297	+ 46.7	2 136	+ 2 273.3	3.19	6.41	Argentina	Kazakhstan
<b>Berries</b>	<b>332 300</b>	<b>0</b>	<b>23 160</b>	<b>+ 202.7</b>	<b>116</b>	<b>- 93.1</b>	<b>2.50</b>	<b>2.65</b>	<b>Poland</b>	<b>-</b>
<b>Stone fruits</b>	<b>532 400</b>	<b>0</b>	<b>287 143</b>	<b>+ 55.4</b>	<b>77</b>	<b>+ 413.3</b>	<b>5.77</b>	<b>13.34</b>	<b>Greece</b>	<b>China</b>
Grapes	-	-	380 657	+ 47.8	460	+ 1 433.3	2.68	7.17	Turkey	Kazakhstan

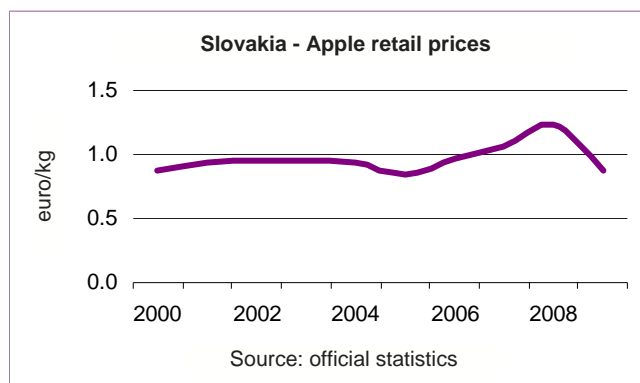
Source: EUROSTAT, FAO, professionals

# SLOVAKIA

Pressure from temperate fruits is among the weakest of Eastern Europe. Tropical fruit imports are thus quite large. As the population is small, potential for trade growth is fairly small.



**Population (2009):** 5.5 million  
**Area:** 49 000 km<sup>2</sup>  
**Capital:** Bratislava (0.4 million)  
**Population trend from 2000 to 2008:** + 0.08%  
**Per capita GDP (2009):** EUR 15 100  
**GDP/PPP (purchasing power parity):** 72.2 (base 100: EU)



Slovakia — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 5.00	+ 6.70	+ 8.50	+ 10.60	+ 6.20	- 4.70

Slovakia — Retail Sales distribution in 2007 — in percent				
Superstores	Supermarkets	Discount	Greengrocers, markets	Others
24	24	14	34	4

Slovakia — Advantages / Constraints		
	Positive	Negative
Internal	Few competing fruits. Modern retail distribution. High GDP.	Moderate consumption potential.
External	Small risk of bad debts.	No seaboard.

Slovakia — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Slovakia kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	63 733	41	+ 29	- 37	10 914	+ 25	9.6	11.7	Czech Rep. Belgium	Czech Rep
Orange	-	-	21 565	187	- 26	+ 105	2 185	- 82	3.6	15.0	Greece Czech Rep.	Hungary
Easy peelers	-	-	17 839	1 804	- 22	+ 109	2 878	- 22	3.0	6.2	Spain Czech Rep.	Hungary
Lemon	-	-	8 850	931	- 6	+ 53	1 640	- 1	1.5	3.1	Czech Rep. Spain	Hungary
Grapefruit	-	-	4 631	326	+ 10	- 63	467	- 33	0.8	0.9	Czech Rep.	Hungary
<b>Total citrus</b>	-	-	<b>52 885</b>	<b>3 248</b>	<b>- 18</b>	<b>+ 75</b>	<b>7 169</b>	<b>- 36</b>	<b>8.9</b>	<b>25.2</b>	<b>Czech Rep.</b>	<b>Hungary</b>
Pineapple	-	-	4 016	17	+ 62	- 52	142	- 63	0.7	1.9	Poland	Czech Rep
Mango	-	-	445	0	- 49	-	4	- 96	0.1	0.5	Germany	-
Avocado	-	-	229	0	- 46	-	12	- 40	0.0	0.8	Netherlands	-
<b>Total exotics</b>	-	-	<b>4 690</b>	<b>17</b>	<b>- 11</b>	<b>- 52</b>	<b>158</b>	<b>- 66</b>	<b>0.8</b>	<b>1.8</b>	-	-
Kiwi	-	-	6 024	0	0	-	974	- 1	0.9	1.8	Germany	Hungary
<b>Apple</b>	<b>29 764</b>	-	<b>37 255</b>	<b>nd</b>	<b>+ 12</b>	<b>-</b>	<b>11 188</b>	<b>- 22</b>	<b>10.2</b>	<b>20.4</b>	<b>Poland Czech Rep. Italy</b>	<b>Czech Rep.</b>
Pear	349	-	4 326	nd	+ 22	-	743	+ 11	0.7	6.4	Netherlands	Czech Rep
<b>Berries</b>	<b>656</b>	-	<b>7 589</b>	<b>0</b>	<b>+ 576</b>	<b>-</b>	<b>23</b>	<b>- 71</b>	<b>1.5</b>	<b>2.7</b>	<b>United Kingdom</b>	<b>Czech Rep.</b>
<b>Stone fruits</b>	<b>5 167</b>	-	<b>14 320</b>	<b>764</b>	<b>+ 45</b>	<b>-</b>	<b>2 811</b>	<b>- 10</b>	<b>3.2</b>	<b>13.3</b>	<b>Italy</b>	<b>Hungary</b>
Grapes	-	-	15 439	38	+ 2	+ 2	1 378	- 52	2.6	7.2	Italy	Hungary

Source: EUROSTAT, FAO, professionals

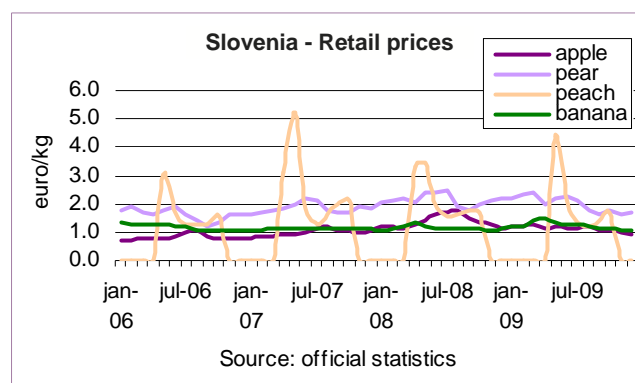
# SLOVENIA

Slovenia has a population of two million and very large fruit production. It is a centre for imported citrus and tropical fruits (bananas) that are then forwarded to Central Europe (Romania and former Yugoslavia). The retail distribution network is similar to the Western European model and development is fairly saturated. The import market is large and future growth seems improbable.



Modern retailing accounts for 67% of food sales. However, the small proportion of urbanisation (51%) limits the establishment of large supermarkets.

<b>Population (2009):</b> 2.0 million
<b>Area:</b> 20 000 km <sup>2</sup>
<b>Capital:</b> Ljubljana (0.3 million)
<b>Population trend from 2000 to 2008:</b> + 3.40‰
<b>Per capita GDP (2009):</b> EUR 20 000
<b>GDP/PPP (purchasing power parity):</b> 90.9 (base 100: EU)



Slovenia — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 4.30	+ 4.50	+ 5.80	+ 6.80	+ 3.50	- 7.80

Slovenia — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	High GDP. Modern retail distribution.	Strong competition from local produce Small consumption potential.
<b>External</b>		Limited access by sea.

Slovenia — Fruit market panorama												
	Production (2007-08 average) tonnes	Processing tonnes	Import				Export		Apparent consumption		Main suppliers	Main customers
			in 2009 tonnes		Evolution 2006-09 %		in 2009 tonnes	Evolution 2006-09 %	Slovenia kg/cap/year	EU-15 kg/cap/year		
			intra	extra	intra	extra						
Banana	-	-	1 192	69 872	- 83	+ 137	42 512	+ 332	14.3	11.7	Ecuador Colombia	Romania Italy
Orange	-	-	16 825	2 596	+ 20	- 43	10 571	+ 107	4.4	15.0	Greece Italy	Croatia Bosnia
Easy peelers	-	-	15 304	5 374	+ 53	- 34	12 473	+ 106	4.1	6.2	Italy Croatia	Bosnia
Lemon	-	-	5 554	3 090	+ 8	- 53	6 802	+ 11	0.9	3.1	Spain Turkey	Croatia Bosnia
Grapefruit	-	-	1 317	7 852	+ 22	+ 30	7 217	+ 25	1.0	0.9	Israel	Serbia
<b>Total citrus</b>	-	-	<b>38 999</b>	<b>18 913</b>	<b>+ 31</b>	<b>- 12</b>	<b>37 064</b>	<b>+ 73</b>	<b>10.4</b>	<b>25.2</b>	<b>Italy</b>	<b>Bosnia</b>
Pineapple	-	-	3 335	3	+ 42	- 87	2 078	+ 226	0.6	1.9	Italy	Croatia Bosnia
Mango	-	-	296	257	+ 8	+ 345	343	+ 273	0.1	0.5	Austria	Netherlands
Avocado	-	-	268	985	+ 94	+ 212	1 069	+ 229	0.1	0.8	Italy	Netherlands
<b>Total exotics</b>	<b>160</b>	-	<b>3 898</b>	<b>1 245</b>	<b>+ 48</b>	<b>+ 157</b>	<b>3 489</b>	<b>+ 243</b>	<b>0.8</b>	<b>1.8</b>	-	-
Kiwi	160	-	8 843	23	+ 1	-	8 833	+ 2	0.1	1.8	Italy	Serbia
<b>Apple</b>	<b>108 693</b>	-	<b>17 434</b>	<b>494</b>	<b>+ 99</b>	<b>+ 465</b>	<b>27 370</b>	<b>+ 24</b>	<b>49.6</b>	<b>20.4</b>	<b>Austria Hungary</b>	<b>Bosnia Croatia</b>
Pear	10 561	-	4 835	275	+ 7	+ 144	5 965	+ 39	4.9	6.4	Italy	Croatia Bosnia
<b>Berries</b>	<b>1 817</b>	-	<b>1 790</b>	<b>141</b>	<b>+ 26</b>	<b>+ 123</b>	<b>548</b>	<b>+ 235</b>	<b>1.6</b>	<b>2.7</b>	<b>Italy</b>	<b>Croatia</b>
<b>Stone fruits</b>	<b>17 074</b>	-	<b>15 217</b>	<b>1 446</b>	<b>+ 25</b>	<b>+ 34</b>	<b>8 042</b>	<b>+ 97</b>	<b>12.8</b>	<b>13.3</b>	<b>Italy Netherlands</b>	<b>Croatia Bosnia</b>
Grapes	-	-	9 538	793	+ 19	+ 1 239	9 010	+ 7	0.7	7.2	Italy	Bosnia Croatia

Source: EUROSTAT, FAO, professionals

# UKRAINE

Ukraine has the second largest population of the Eastern European countries. Large fruit production—mainly apples—makes it a small importer. The development of an import market is difficult there as per capita GDP is low (4 600 euros) and the retail distribution network is still very traditional, with supermarkets accounting for only 10% of sales.



**Population (2009):** 46 million  
**Area:** 600 000 km<sup>2</sup>  
**Capital:** Kiev (2.8 million)  
**Population trend from 2000 to 2008:** - 6.38‰  
**Per capita GDP (2009):** EUR 4 600  
**GDP/PPP (purchasing power parity):** 27.0 (base 100: EU)

Ukraine — Retail				
Sales distribution in 2002 — in percent				
Superstores	Supermarkets	Discount	Greengrocers	Markets
1	6	3	40	50

Ukraine — GDP — in percent					
2004	2005	2006	2007	2008	2009
+ 12.10	+ 2.70	+ 7.30	+ 7.90	+ 2.10	- 9.00

Ukraine — Advantages / Constraints		
	Positive	Negative
<b>Internal</b>	Large population. Moderate pressure from competing fruits.	Fairly traditional retail distribution. Very low GDP.
<b>External</b>	Extensive access by sea.	Ports little developed.

Ukraine — Fruit market panorama										
	Production (2007-08 average) tonnes	Processing tonnes	Import		Export		Apparent consumption		Main suppliers	Main customers
			in 2007 tonnes	Evolution 2004-07 %	in 2007 tonnes	Evolution 2004-07 %	Croatia kg/cap/year	EU-15 kg/cap/year		
<b>Banana</b>	-	-	236 985	+ 256.3	75	+ 3 650.0	5.15	11.67	Ecuador	Lithuania
Orange	-	-	102 707	+ 82.4	35	-	2.23	15.01	Egypt	-
Easy peelers	-	-	140 009	-	18	-	3.04	6.20	Turkey	Russia
Lemon	-	-	63 824	+ 74.9	5	-	1.39	3.14	Turkey	-
Grapefruit	-	-	18 143	+ 215.4	0	-	0.39	0.87	Turkey	-
<b>Total citrus</b>	-	-	<b>324 683</b>	<b>+ 52.8</b>	<b>58</b>	<b>-</b>	<b>7.06</b>	<b>25.21</b>	<b>Turkey</b>	<b>-</b>
Pineapple	-	-	5 247	+ 440.4	0	-	0.11	1.90	Costa Rica	-
Mango	-	-	0	-	0	-	0.00	0.47	-	-
Avocado	-	-	598	+ 2 200.0	0	-	0.01	0.76	Israel	-
<b>Total exotics</b>	-	-	<b>5 845</b>	<b>+ 1 320.2</b>	<b>0</b>	<b>-</b>	<b>0.13</b>	<b>3.13</b>	<b>Italy</b>	<b>-</b>
Kiwi	-	-	20 294	+ 25 267.5	0	-	0.44	1.82	-	-
<b>Apple</b>	<b>737 100</b>	<b>20 782</b>	<b>167 603</b>	<b>+ 27 286.1</b>	<b>52 049</b>	<b>+ 4 107.7</b>	<b>18.08</b>	<b>20.37</b>	<b>Moldavia</b>	<b>Russia</b>
Pear	132 900	-	4 868	+ 11 773.2	981	+ 1 157.7	2.97	6.41	Moldavia	Russia
<b>Berries</b>	<b>79 000</b>	<b>-</b>	<b>222</b>	<b>+ 4 340.0</b>	<b>2</b>	<b>- 99.9</b>	<b>1.72</b>	<b>2.65</b>	<b>Spain</b>	<b>-</b>
<b>Stone fruits</b>	<b>416 900</b>	<b>-</b>	<b>35 310</b>	<b>+ 1 765 400.0</b>	<b>3 981</b>	<b>+ 702.6</b>	<b>9.74</b>	<b>13.34</b>	<b>Greece</b>	<b>Russia</b>
Grapes	-	-	74 569	+ 22 428.4	483	+ 245.0	1.61	7.17	Turkey	Russia

Source: EUROSTAT, FAO, professionals