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## Sustainable Fruit and Vegetables : an history of 40 years, also on organic

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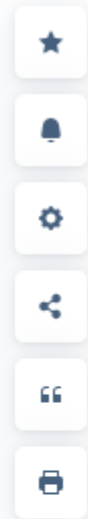
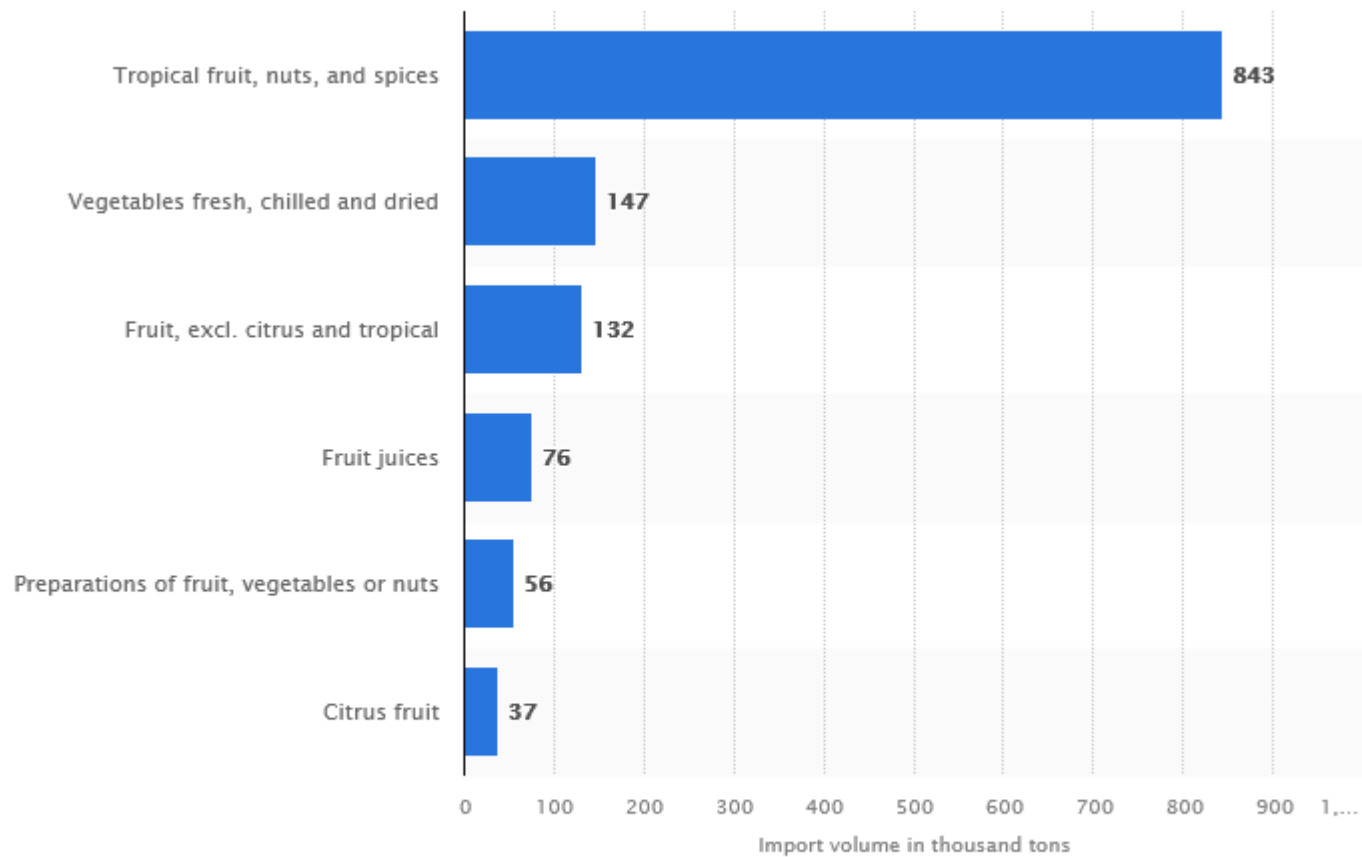


# A growing European demand I

- Always difficult to provide sound data on organic fruit and vegetable European consumer demand
- We will look first to imports and then to EU production, in order to achieve a more global picture.
- 2022 is unknown. French data suggest a stability (or even a decrease) due to the “perfect storm” we are suffering
- **Trends in imports** (at least until 2021) were clear: annual growth in 2020 as compared with 2019 (Source: European Commission) tropical fruit (+9%), vegetables (0,7%), fruits (+7%), citrus (+31,3%), preparation of vegetables, fruit and nuts (+2,5%) Bulbs, roots and live plants (+15,8%)

# Import volume of organic fruits and vegetables into the EU in 2020, by type

(in 1,000 tons)



[Additional Information](#)

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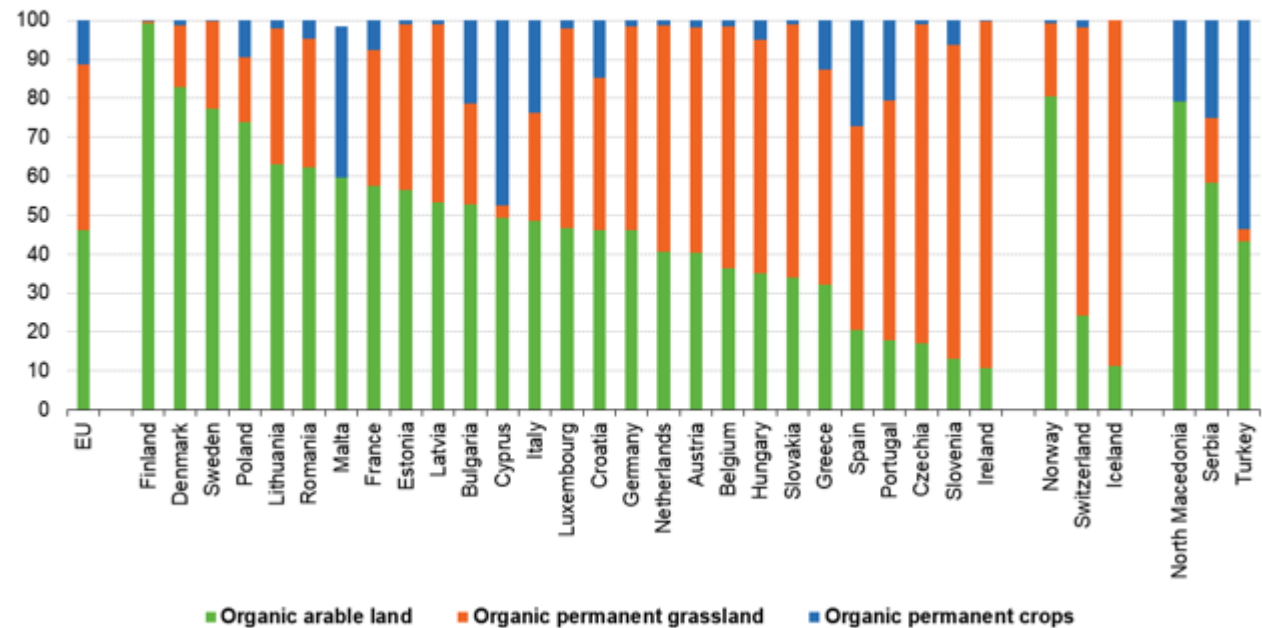
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# A growing European demand II

- Trends in EU area and production were also clear: Total organic area +6,5% in 2020, up to 14,7 M. Ha, 9,1% of total utilised area;

**Organic arable land crops, permanent grassland (pastures and meadows) and permanent crops, 2020**

(% of total organic area - fully converted and under conversion)



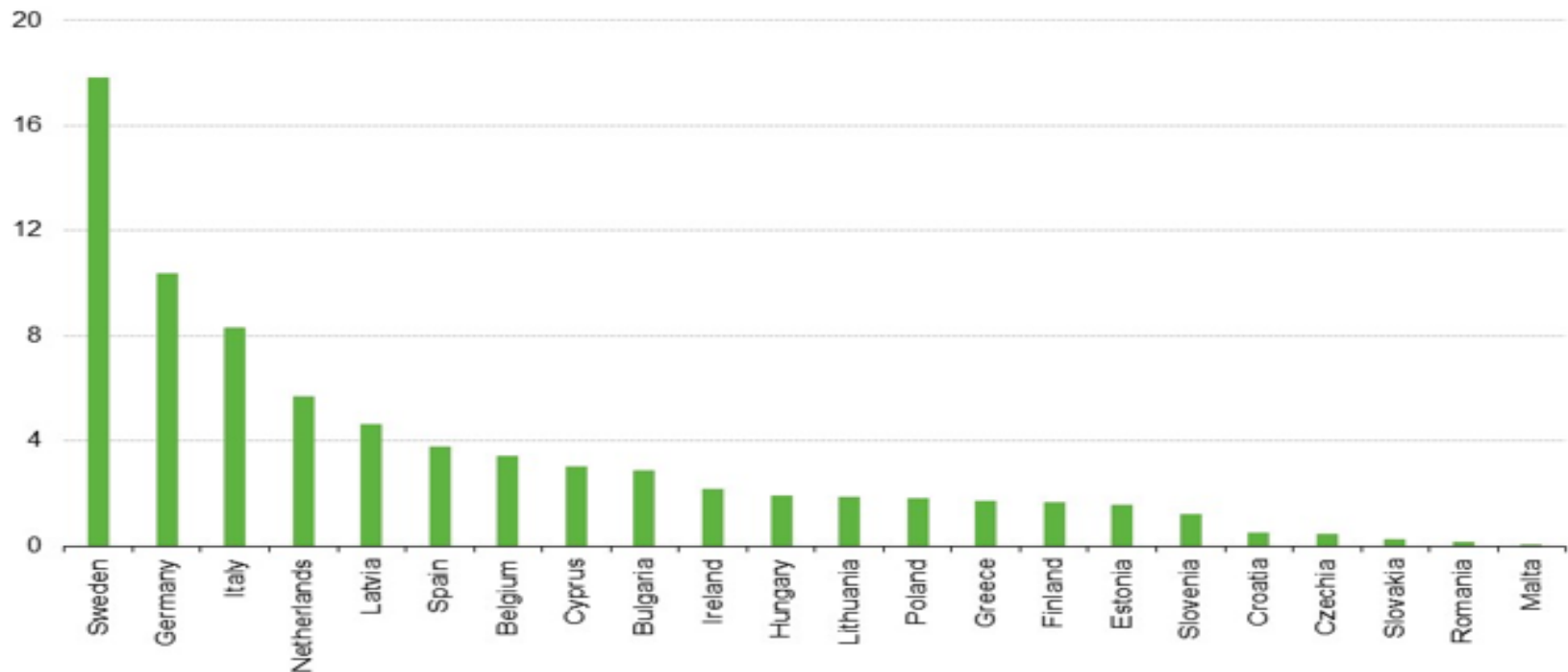
Note: EU, estimate. BE and FR, provisional. AT, 2019.

Source: Eurostat (online data code: org\_cropar)

# A growing European demand II

## Share of organic fresh vegetables production in total fresh vegetables production, 2020 (%)

(%)



Note: IT, provisional. DK, FR, LU, AT, PT not available

Source: Eurostat (online data codes: org\_croppro and apro\_cpsh1)

eurostat 

Figure 4: Share of organic fresh vegetables production in total fresh vegetables production, 2020 (%) Source: Eurostat (org\_croppro), (apro\_cpsh1)

# A dynamic European organic production I

- We have just issued a report on Sustainable Fruit and vegetables in Europe: a 40 years history, promoted by the AREFLH
- Temperate fruits were grown in 2020 on more than 150.000 hectares ( European Union : more than 120.000 ha) and they covered 5,7% of the total temperate fruit area ( 10% in the EU).
- Several countries in the EU had a considerable amount of land dedicated to the temperate fruit ( e.g apples in Poland and berries in Baltic countries). The most important fruit were apples (70.732 Ha), cherries ( 18.731 Ha), plums (18.002 HA).



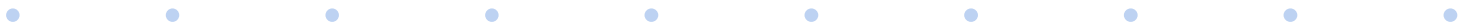
# A dynamic European organic production II

- The largest temperate fruit producers were in Italy and France with more than 20.000 Ha each.
- In 2020 organic vegetables were grown on more than 190.000 Ha in Europe, covering 4,7 % and 9,5% of the vegetable area, respectively. The largest areas were in Italy ( 64.762 Ha), France (36.305 Ha) and Spain ( 22.023 Ha).
- Other approaches also contributed to a more sustainable European fruit and vegetable sector such as Integrated Pest management or 0% residues. They are often the entry door to a final shift to organic farming



# POs at the heart of this evolution: A few concrete examples from some ARPFLH

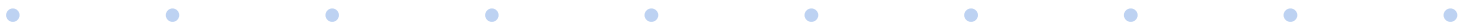
- France: Rougeline Bo, Pomévasion, Coop Latour, Association Nationale Pommes et Poires
- Spain: UNICA, Fruit du Ponent, Coop FruDeca
- Italy: APOT, Viva Group, FINAF, Vonserva Italia
- Belgium: VBT
- Check Republic: EB Fruit, CZ Fruit
- The complete study is available:
- <https://tomasmarciaazcarate.chil.me/post/sustainable-fruit-and-vegetables-a-40-years-history-402406>





# And tomorrow (2020)?

- We, the economists, are quite good in predicting the past but clearly worst on the future. This is even more true today.
- On one side, a strong political will; on the other, economic uncertainties on consumer behavior and the length of the economic, international, trade and economic crisis.
- The evolution of the consumers' demand will be essential, as the easiest conversions have been already done.
- An increase production (due to strong political support) without a corresponding increase in demand would impact negatively prices received by organic producers and increase abandonments .



# Three scenarios I

- **Scenario I:** Business as usual. We will not achieve the political goal of 20% of the EU agricultural area under organic, but we will move at the same speed tomorrow than yesterday. Total agricultural area would move from 9% to 15% in 2030. Grower growth expected in fruit and vegetable production.
- **Scenario II:** We will maintain current percentage or have limited increases: around 10%.
- **Scenario III** (for me, the most probable): We will be somewhere in the middle of both previous scenarios.
- **Other approaches:** IPM will be the basis for commercial production; others will smoothly increase too

# CONCLUSIONS

- No alternative for the European fruit and vegetable sector: increase quality and market segmentation
- **CONSUMER DEMAND EVOLUTION IS KEY:** but depends mainly on economic policies outside our control.
- Excessive political pushes for increasing organic production can be counterproductive
- Reciprocity in international trade, proper quality controls at EU borders are also relevant

**It is a global industry challenge, from from to fork, from  
retailers to farmers.**

# THANK YOU



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