

# Fruit Logistica 2012

## The global fresh produce trade meets in Berlin

*2,537 exhibitors from 84 countries present entire fresh produce value chain – More than 56,000 top decision makers from 130 countries to visit Berlin – Award for innovation of the year – Partner country Turkey aims for fivefold increase in exports. 1.575 billion tonnes of fruit and vegetables produced worldwide in 2011 – Fresh produce trade in Germany generates nearly EUR 20 billion.*

With a complete market overview of international fresh produce business logistics, the 20th edition of FRUIT LOGISTICA highlights the event's status as the industry's leading trade fair. All key market players as well as small and medium-sized companies within the international value chain will be present at the Berlin Exhibition Grounds from 8 to 10 February 2012. Some 2,537 exhibitors from 84 countries will be presenting a full range of products and services from all levels of fruit and vegetable production and marketing. Around 90% of the exhibitors are coming from outside Germany. More than 56,000 trade visitors from 130 countries will be at the trade fair and accompanying conferences. The visitors include all major industry decision makers and commercial partners from the wholesale and retail trades, along with fruit and vegetable growers, importers and exporters. The biggest contingents based on the number of exhibitors are



from European produce trading nations: Italy (457), Spain (274), the Netherlands (266), Germany (265) and France (238). New at FRUIT LOGISTICA 2012 are exhibitors from Mauritius, Montenegro, and Mozambique.

According to Messe Berlin GmbH COO Dr. Christian Göke, "More than any other top international trade fair, FRUIT LOGISTICA has established a unique position as industry leader. The key criterion is the fact that this is a must-attend event for virtually all key decision-makers and fresh produce trading partners. With 90 per cent of the exhibitors coming from outside of Germany, FRUIT LOGISTICA is more international in scope than any other trade event in Germany. The success story of this exhibition is impressive and the 20th edition of FRUIT LOGISTICA is bound to set new records."

Turkey is the FRUIT LOGISTICA 2012 partner country. With a growing international demand for its high quality products, an enormous production capacity and increasingly competitive structure, Turkey is one of the world's leading fresh produce trading nations. The country, which annually produces 44 million tonnes of fruit and vegetables with exports valued at USD 2.1 billion, has been present with a joint exhibition stand at FRUIT LOGISTICA every year since 2000. Turkey exports 2.9 million tonnes of fruits and vegetables annually. This is equivalent to 6.6% of total production. The country is aiming to increase the value of its exports to USD 10 billion by 2023. FRUIT LOGISTICA is likely to play an important part in achieving this ambitious goal. Turkey is gearing up for its biggest trade fair appearance with a

1,000 square metre stand in Hall 1.1 and 38 companies from the fresh produce and packaging sector. The country's presence will be organized for the ninth time by the Mediterranean Exporter Unions.

Parallel to FRUIT LOGISTICA 2012, Messe Berlin is presenting FRESHCONEX 2012, the international trade fair for fresh produce convenience, in Halls 7.2b and 7.2c. This fresh produce segment is also represented throughout the FRUIT LOGISTICA exhibition area. The specially signposted FRESHCONEX Route points the way to companies presenting fresh convenience products. It also highlights the "Packaging", "Processing Technologies" and "Food Safety" segments.



### Global fresh produce sector facts and figures

According to the latest figures from the AMI (agricultural market information service) in Bonn, 850 million tonnes of vegetables (excluding melons) and 725 million tonnes of fruit (including melons) were produced worldwide in 2011. Production figures for both fruit and vegetables have steadily increased over the past few years. Apple production in the Northern Hemisphere increased in 2011, while citrus fruit production remained at the previous year's figures. Melons are



the most frequently harvested fruit, followed by bananas. Together they account for a volume of 100 million tonnes. Equally important are apples, grapes and oranges with a harvest of around 70 million tonnes. Together, the five most important fruit varieties make up 60% of the total harvest. The spectrum is more varied for vegetables with the five leading varieties (tomatoes, onions, cabbage, cucumbers and aubergines) accounting for only about 45% of total production. Around 10% of the worldwide production of key fruit varieties is traded internationally. For fresh vegetables, this figure is only 3-4%.

The EU is the world's leading import region for fresh fruit. For fresh vegetables this is only the case if trade between EU countries is also taken into account, otherwise the U.S. leads the way. Russian imports, which increased significantly in the 2010/11 season, are likely to decline again in the 2011/12 season. The reason for this lies in larger domestic harvests. The EU fruit crop increased by more than 5% in 2011 to around 37 million tonnes. Larger harvests of stone and pome fruit offset a slight decline in citrus fruit production. Vegetable production in the EU is expected to reach 63 million tonnes in 2011, some 3% more than the previous year. The record-breaking onion crop (5.7 million tonnes, +19%) played an important part in the increase.





Fruit production in the German market increased in 2011 by 6% to total 1.23 million tonnes. This figure, however is lower than in previous years. Late frosts in May prevented a full swing back to a bumper crop following the previous year's meagre harvest. Strawberry production lagged behind 2010 figures. The production of market vegetables increased by 7% to 3.59 million tonnes and almost reached the record set in 2009. The vegetable market in Germany and Europe suffered for months from the impact of the E. coli crisis that resulted in losses estimated at several million Euros for vegetable growers.

German imports of fresh vegetables are likely to reach 3 million tonnes in 2011, which is 3-4% lower than the record set in 2010. Last year's stagnating imports of fresh fruit decreased slightly to 4.9 million tonnes.

According to AMI estimates, approximately 2,300 wholesale companies generated sales of EUR 20 billion in fresh fruit, vegetables and potatoes in 2010. This figure declined in 2011, primarily as a result of price-related factors. The E. coli crisis in May/June 2011 also resulted in lost revenue. Nevertheless, sales are expected to surpass the EUR 19.5 billion threshold.

## Average household purchased 138.6 kg of fresh fruit and vegetables

The AMI used information from the GfK household panel to determine the amount of fresh produce purchased by German households in 2011. Last year, the average household consumed 138.6 kg of fresh fruit and vegetables. Accordingly, each household purchased 76.7 kg of fresh fruit (6% less than the



previous year) and spent EUR 124.96 (2% less than the previous year). In addition, 61.86 kg of fresh vegetables were purchased per household (1% more than the previous year) for a total of EUR 117.00 (4% less than the previous year).

## Changes in the ranking for top-10 vegetables

Consumption of fresh vegetables per household in 2011 can be broken down as follows: tomatoes (10.0 kg), carrots (7.3 kg), onions (6.5 kg), cucumbers (6.1 kg), peppers (4.9 kg), iceberg lettuce (3.0 kg), cauliflower (2.2 kg), asparagus (2.0 kg), leeks (1.4 kg) and zucchini (1.3 kg).

The amount of fresh vegetables purchased per household in Germany increased by about 1% in 2011 to 61.86 kg. This is roughly equivalent to the average recorded over the past five years. Because of low vegetable prices market-wide, households spent an average EUR 117 for a slightly larger quantity. This is 4% less than the previous year's figure. Tomatoes, carrots and onions were the most frequently purchased vegetables. This marked the first time in years that the ranking changed for the top-4 vegetables. Cucumbers declined in terms of absolute volume and dropped from third to fourth position in the ranking of best-selling vegetables. Marked by

high sales volume, onions moved up a notch in the 2011 ranking. Changes were also reported at the end of the top-10 list, with white cabbage being pushed out of the top ten by zucchini.

## Private households in Germany purchased less fruit in 2011

Based on per-household consumption figures, the following fruit varieties were the most popular in Germany in 2011: apples (20.4 kg), bananas (14.3 kg), oranges (8.4 kg), easy-peelerst including clementines and (5.9 kg), grapes (4.2 kg), strawberries (3.5 kg), melons (3.4 kg), nectarines (3.0 kg), pears (3.0 kg) and pineapple (2.4 kg).

Compared to sales figures from 2010, private households in Germany purchased 6% less fresh fruit in 2011. Various reasons are given for this further decline in the amount of fruit sold. Consumer demand slowed as a result of lower harvest volumes and higher prices. The unusual weather conditions during the summer months and the increase in apples harvested in private gardens also played a role. On average, each private household purchased 76.7 kilos of fresh fruit in 2011. The average amount spent decreased by 2% to €124.96 Euros.

Despite significantly lower volumes in some cases, the first five places in the ranking of top-10 best-selling fruits remained the same in 2011. The ranking begins to change at the sixth position: the early strawberry season in Germany enabled melons to move up a notch.



Compared to figures for the previous year, the demand for melons declined in the summer months due to cool weather conditions.

## Innovation of the year

The FRUIT LOGISTICA Innovation Award (FLIA) is regarded as the most coveted industry award for innovations in the fresh produce sector. The FLIA honours outstanding new products and services that give impetus to the fresh produce industry. Ten candidates from the numerous entries were chosen by an expert jury for the final round. Trade visitors at FRUIT LOGISTICA cast their votes for the innovation of the year at the FLIA stand in the passageway between Halls 20 and 21. The winner will be honoured at the award ceremony on 10 February.

Nominees for the FRUIT LOGISTICA Innovation Award 2012 include (in alphabetical order): "Achacha tropical fruit" from Australia with original roots in South America (Bud Holland, Netherlands), "Pineapple juice with fruit pieces" (McCarter, Slovakia), "Angello" – Sweet & Seedless Pepper (Syngenta, Netherlands), "Dried and candied CIDO" (SIA Amberbloom, Latvia), "Lovemysalad.com" – information for consumers on the "Salad Social Network" (Rijk Zwaan, Netherlands), "Pattruss Z" resealable salad bag (Pattruss, Inc., Japan), "Purple Sprouting Broccoli" (Bejo Zaden, Netherlands), "Roasted Sweet Potato" (Campo Rico, Spain), "Sungreen" sun-ripened green cherry tomato (Tokita Seed Co. Ltd., Japan), "Yonanas: Healthy Frozen Treat Maker" kitchen appliance for making ice cream



from frozen fruit (Healthy Foods, USA). The FRUIT LOGISTICA Innovation Award 2012 is presented by Messe Berlin GmbH and FRUCHTHANDEL MAGAZINE, Düsseldorf.

## Supporting programme

International fresh produce industry representatives can learn about the latest issues, challenges and trends in a series of lectures, seminars and panel discussions. The leading fresh produce trade event kicks off the day before the trade fair opens (7.2.) with the 31st Fresh Produce Forum in the ICC Berlin. The main theme is "Sourcing 2020". Six Hall Forums will take place on the three days of the trade fair. The presentations will be in the Hall Forum in Hall 26. Organized by FRUCHTHANDEL MAGAZINE (Düsseldorf), Hall Forum topics include Optimising urban retail logistics (8.2.), How to handle crisis management (8.2.), The global citrus market (9.2.), The new

banana business (9.2.) Regional sourcing on an international scale (10.2.) and Innovation in the fresh produce business (10.2.). All events will be simultaneously translated into German, English, French, Italian and Spanish.

Outstanding achievements in the fresh produce business will be honoured with industry awards, including the FRUCHTHANDEL MAGAZINE Retail Award 2012 (7.2.) and the FRUIT LOGISTICA INNOVATION AWARD 2012 "FLIA" (10.2.).

## Visitor information

FRUIT LOGISTICA 2012 and the parallel event FRESHCONEX 2012 are being held from 8 to 10 February and are open daily from 9.00 am to 6.00 pm at the Berlin Exhibition Grounds. Tickets are available at special rates from the Online Ticket Shop ([www.fruitlogistica.com](http://www.fruitlogistica.com) > Visitor Service > Tickets & Registration). A one-day ticket is available online for EUR 25.00 and an event pass for EUR 55.00. At the gate, one-day tickets cost EUR 32.00 and an event pass is available for EUR 73.00. An event pass with access to the Fresh Produce Forum costs EUR 85. All tickets include a trade fair catalogue along with admission to the Hall Forum events and to FRESHCONEX.

From 7 to 10 February between the hours of 8.00 am and 7.00 pm, free shuttle buses to the exhibition grounds (north and south entrance) will be running every 30 minutes from Berlin-Tegel airport (Main Arrival Hall/Bus Terminal) and Berlin-Schönefeld airport. FRUIT LOGISTICA and FRESHCONEX also provide a free shuttle-bus service between many local hotels and the exhibition grounds. ♦

