

# **Structural and market changes in the Hungarian fruit industry**



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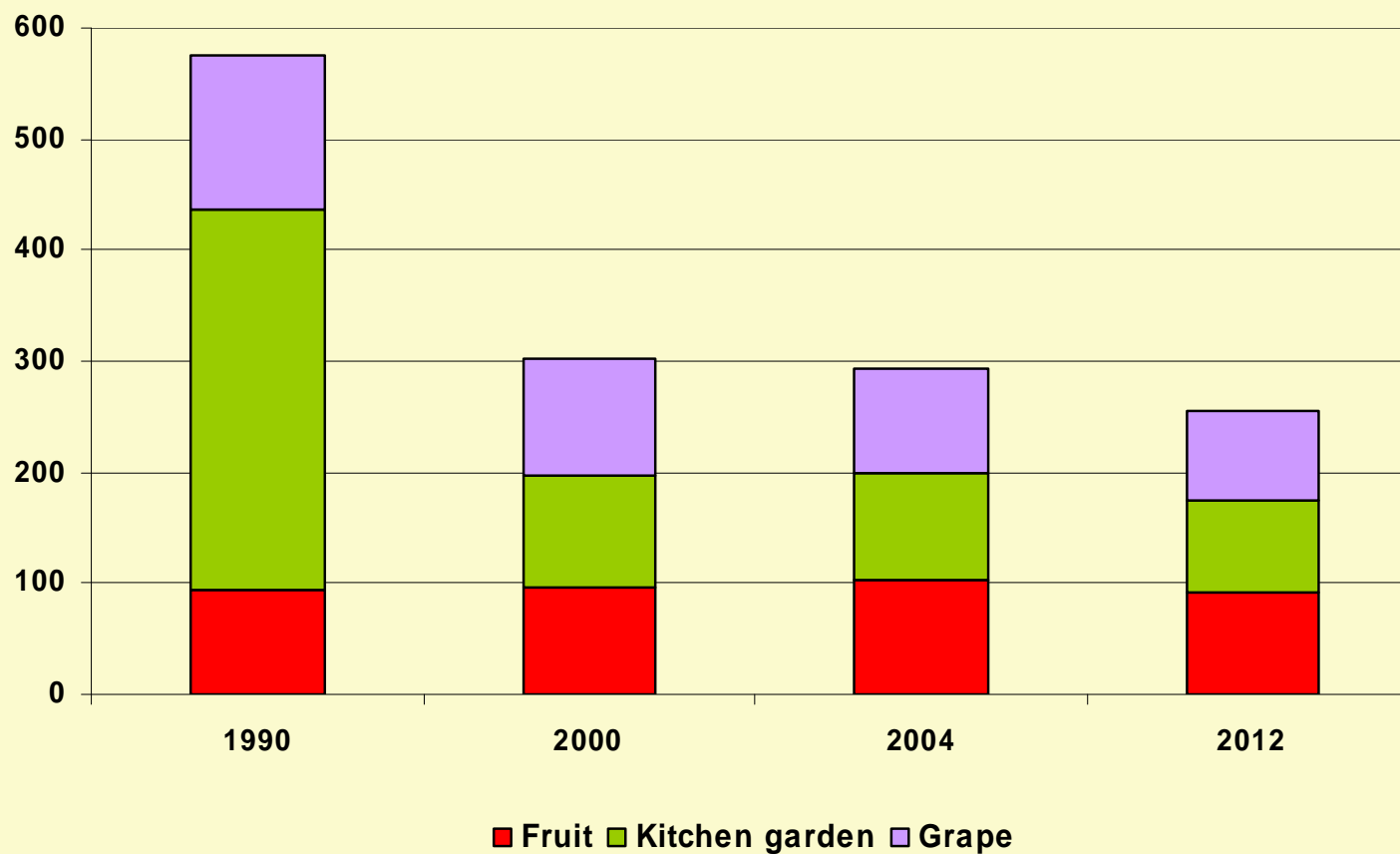
# Characteristics of the Hungarian fruit industry

- **Agricultural output (2011): 7688 million EUR**
  - fresh fruits: 233 million EUR (3.3 %)
  - grape: 95 million EUR (1.2 %)
- **Agricultural area (2012): 5.3 million hectares**
  - fruit orchards: 92 thousand hectares (1.7%)
  - grape orchards: 81 thousand hectares (1.5%)
- **Share of employment in agriculture (2008): 4.5%**
- **Share of consumption in agri-food products (2008): 26.7%**
- **Share of total exports in agri-food products (2008): 6.7%**



# Changes of fruit growing areas in Hungary

thousand hectares



# Fruit Farm structure changes in Hungary (2003 vs 2010)

2003			
Size (hectare)	Number of farms	Area of fruit plantations (hectares)	Area of fruit plantations (%)
< 1	105499	21098	21.0
1 - 2	5602	7800	7.7
2 - 5	4332	13660	13.5
5 - 10	1636	11428	11.3
10 - 20	936	12820	12.7
20 - 30	264	6388	6.3
30+	360	27791	27.5
Total	120129	104723	100

2010			
Size (hectare)	Number of farms	Area of fruit plantations (hectares)	Area of fruit plantations (%)
< 1	88832	13471	16,1
1 - 2	4470	5581	6,7
2 - 5	3855	11006	13,1
5 - 10	1722	10734	12,8
10 - 20	975	12054	14,4
20 - 30	320	6507	7,8
30+	416	24416	29,1
Total	100590	83769	100

## Reasons:

"high costs

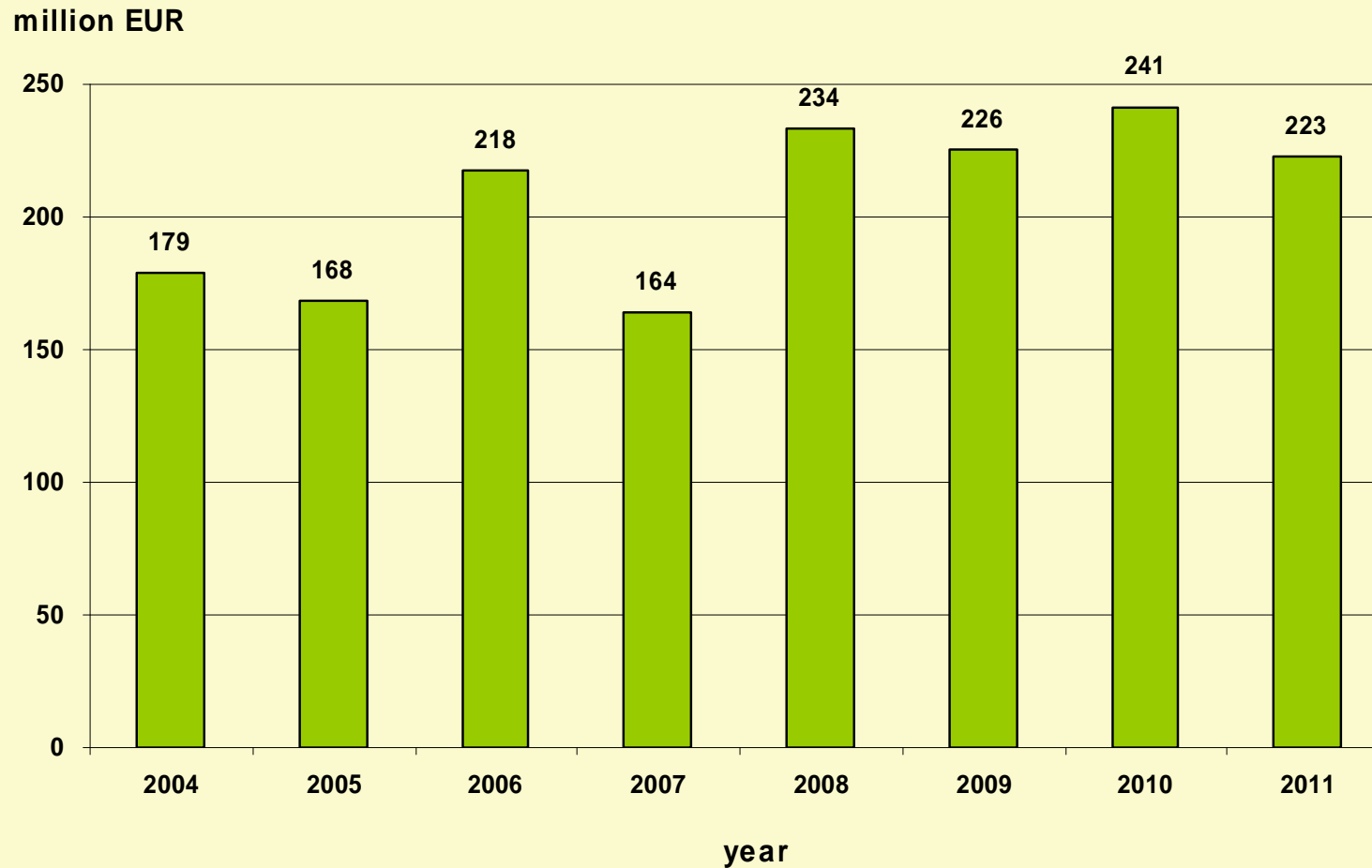
"lack of supports

"lack of assets and services

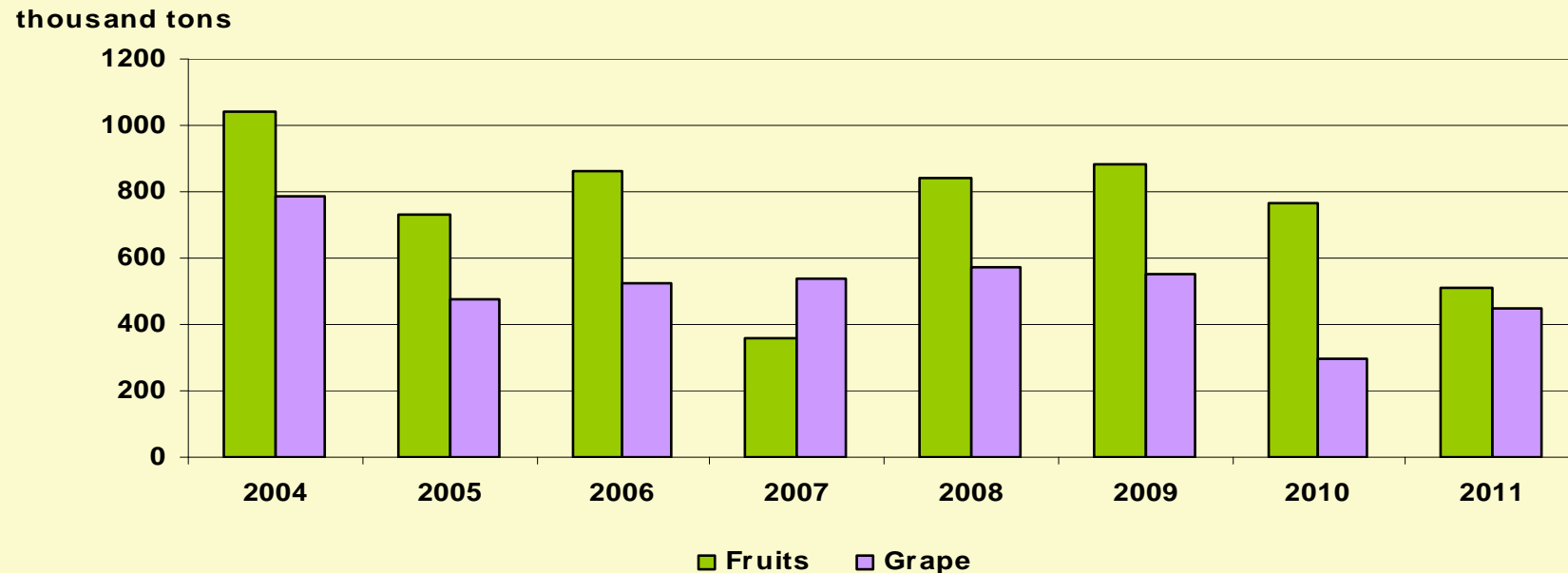
"etc.



# Changes in fruit productivity since joining the EU



# Changes in the harvested fruit crops in Hungary (2004-2011)



## Reasons:

“adverse weather (storm, hail, frost, too much precipitation) ;

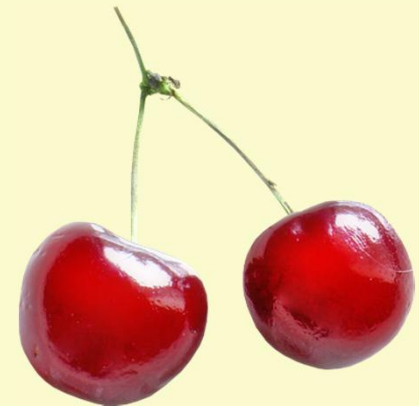
“a large number of old plantations;

“underdeveloped defense technology;

“low prices.

# International factors

- **Development of global food industry**
- **Importance of food safety**
- **Development of food chain**
- **Increase in the importance of the environmental protection**
- **Global economic crisis**



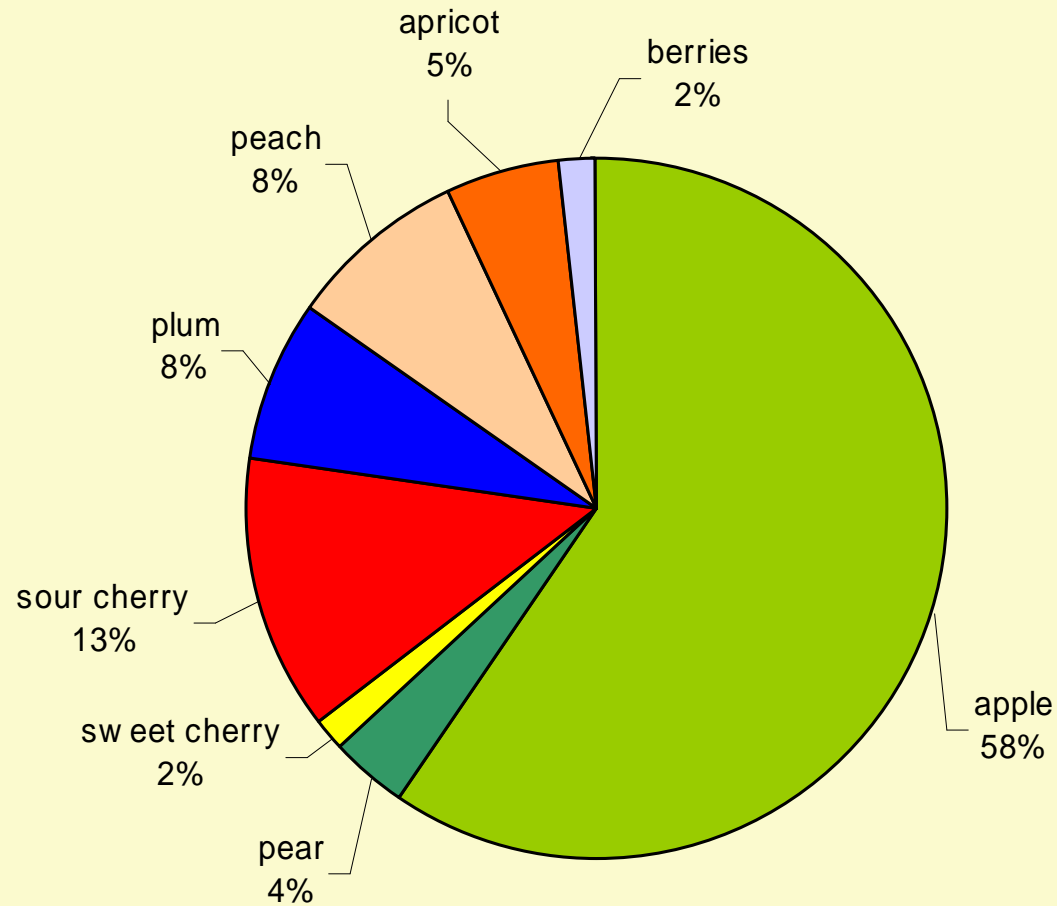
# Problems in Hungarian agriculture

- Low vertical and horizontal level of integration
- Low prices in grocery chain stores
- Regression or lack of a processing industry
- Low consumer awareness
- Demographic problems:
  - Ageing of farmers
  - Wages in agriculture are only 75% of the national average
- Lack of innovation
- Weakening of a research-development background
- Lack of collaboration (producer organisations)



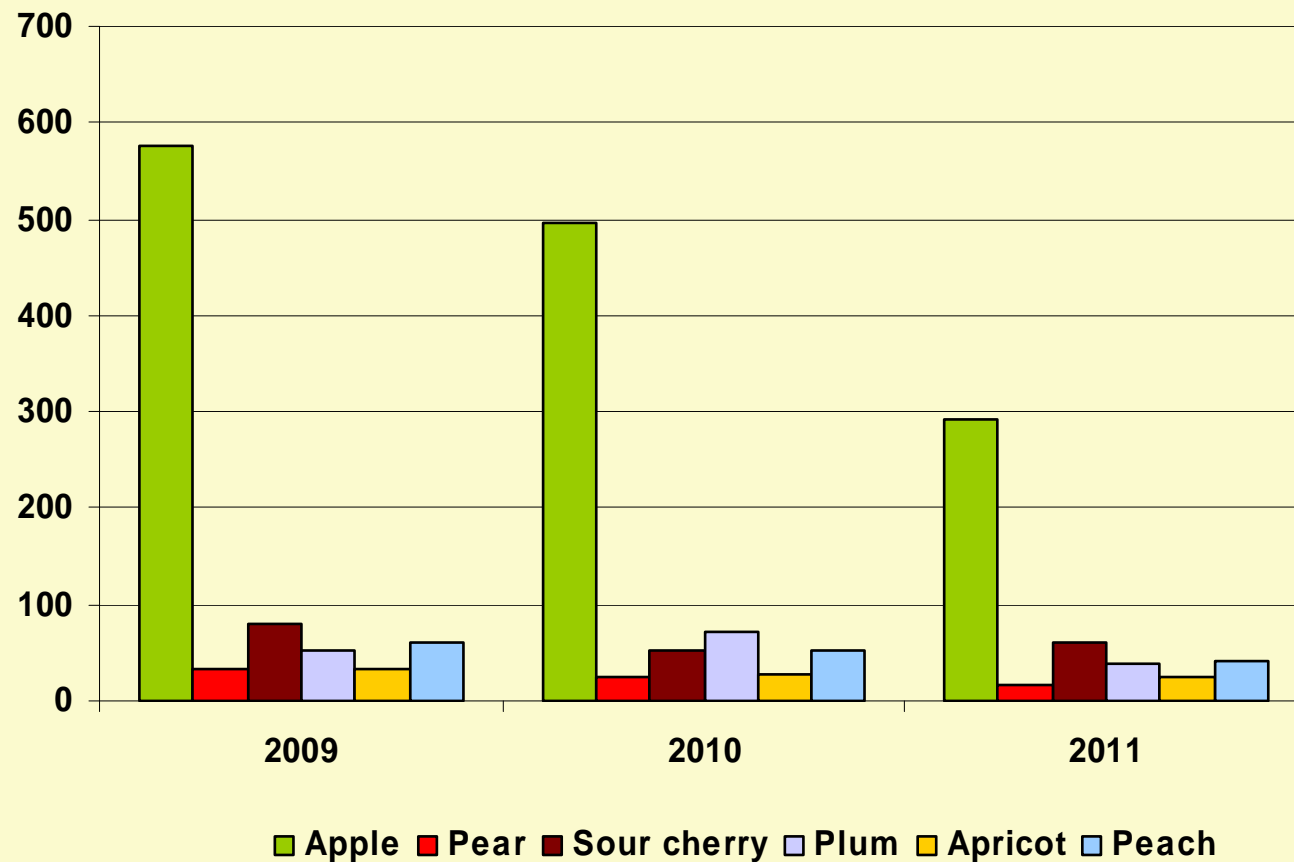


# Ratio of fruit species in Hungary (2011)



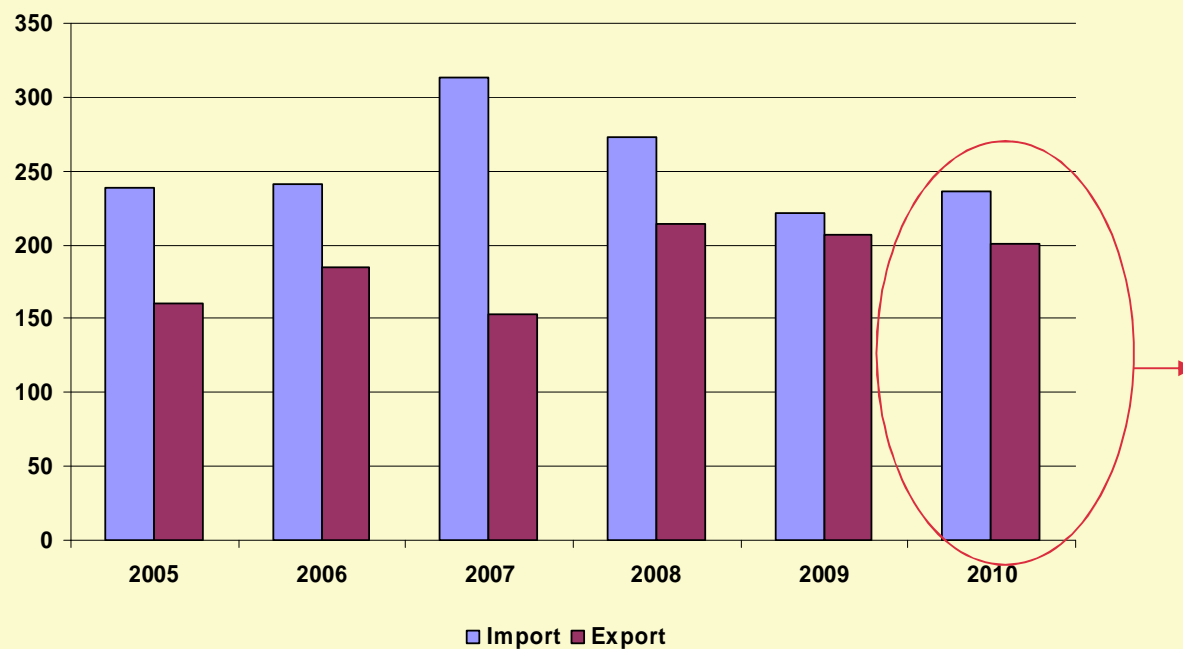
# Production of the most important fruits in the past years in Hungary

thousand tons

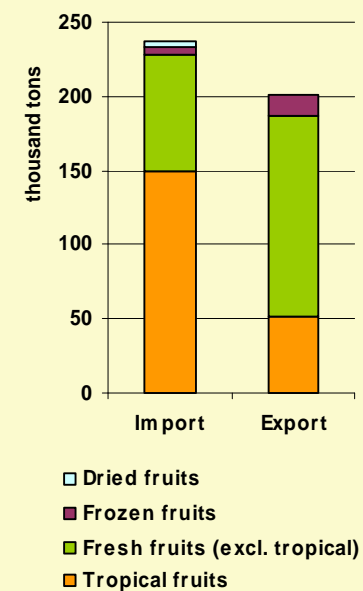


# Hungarian fruit export-import data, 2005-2010

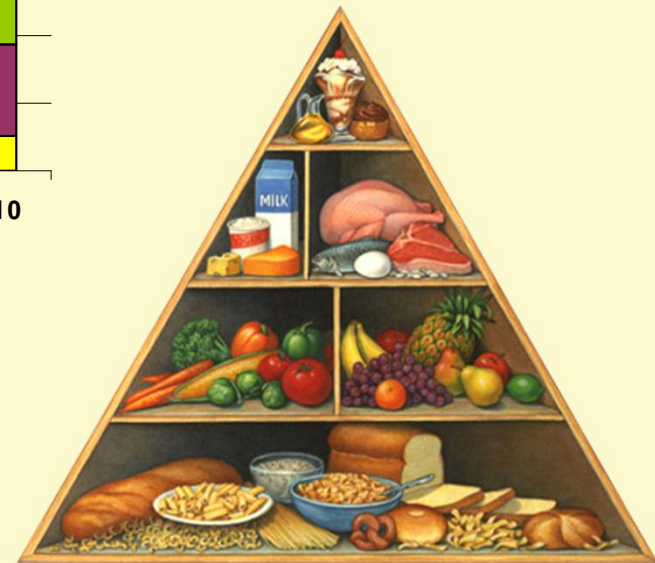
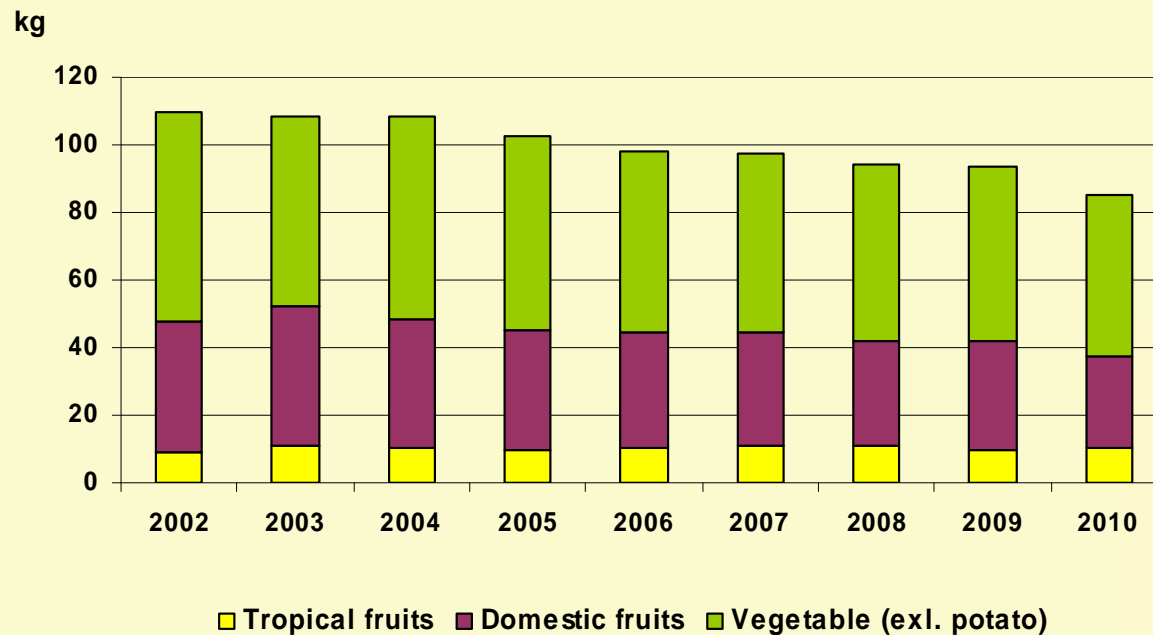
thousand tons



2010

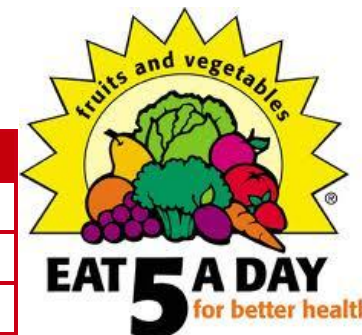


# Per capita annual fruit-vegetable consumption (kg) in Hungary, 2002-2010





## Incentive schemes in the world



Country	Programme	Daily portion
Argentina	5 al día	5x
Australia	Go For 2 Fruit and 5 Veg	7x
Austria	Obst mal 5	5x
Brasil	5 ao dia	5x
Canada	5 To 10 A Day For Better Health	5-10x
Denmark	6 a day	6x
Finland	Kotimaiset Kasvikset	
France	10 par jour	10x
Germany	5 am Tag	5x
Hungary	Naponta 3x3	9x
Japan	5 a Day	5x
Mexico	5 X DÍA, Verduras y Frutas	5x
Netherlands	2 + 2 (2 fruits + 2 vegetables)	2x2
New Zealand	5 a Day	5x
Norway	Skolefrukt	
Peru	5 al día	5x
Poland	Eat 5 a Day Fruits and Vegetables	5x
Spain	5 al día	5x
Sweden	Fruktogront	
Switzerland	5 am Tag – Früchte & Gemüse	5x
United Kingdom	5 a Day	5x
USA	5 a Day	5x
Venezuela	5 al día	5x





# Possibilities



- Introduction of up-to-date technologies
- Chemical-free environmentally friendly technologies
- Creation of producer-owned processing plants
- Wider range of products needed (new varieties, functional foodsÅ )
- Using better post harvest technologies (packaging, coolingÅ )
- Support and promotion of producer organisations (POs)
- Increase of research and development background
- Consulting networks
- etc.





**Thank you for your attention!**

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