DEVELOPMENTS IN THE GREEK HORTICULTURAL SECTOR
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The deep financial crisis of Greece has had an enormous effect on virtually all the economic sectors of the country. Important budget cuts will be enforced to stabilize the economy. Apart from these necessary budget cuts, the Greek government wants to invest in growth and has earmarked 4 promising sectors as a priority to stimulate growth and to recover from the deep recession. The agrofood chain is one of these sectors, as it has proven to be one of the least affected by the current recession.

In Greece the agrofood chain is a very dynamic sector and important both in terms of production and employment. In particular, the horticultural sector offers ample opportunities to grow and to become internationally more competitive.

The objective of this market special is to offer the Dutch agribusiness a clear picture of the opportunities of the Greek horticultural sector and to provide information about the structure of the market, the key players, the strengths, the weaknesses, bottlenecks and opportunities. This market special gives an assessment of the potential of this Greek private sector and the expected future developments and how Dutch agribusiness can benefit from this change.

In order to achieve this goal, the Dutch Ministry of Economic Affairs, Agriculture and Innovation commissioned Rigakis Seeds SA to conduct a survey on the present state of the Greek market of fruits and vegetables. The survey was conducted and edited by Angelos Rigakis, Deputy President of Rigakis Seeds. The company has more than 30 years of experience in the Greek horticultural sector. The Economic Department of the Netherlands Embassy in Greece initiated and directed this market special.

The first part of the market special offers a basic background of the Greek fruit and vegetable market. Data is given about current cultivations, production and geographical concentration.

Furthermore, the major players in the market and investment incentives are presented.

The last part aims to identify changes and opportunities for potential Dutch investors in the fruits and vegetables market.

At the end of the market special contact details of the major players and most important events are provided.
The agricultural sector is important for the Greek economy. More than 3% of the GDP is earned in this sector using up 12.6% of the working population. Thanks to the climatological conditions, farmland distribution and land ownership, the fruits and vegetables market holds a large share in the agricultural sector. Nearly one third of the agricultural production is produced in the fruit and vegetable sector. Despite the great importance of fruit and vegetable production and the relatively high participation of the working population, however, Greece still imports large quantities of fruits and vegetables.

Due to outdated production methods, relatively high production cost and low transparency in the distribution chain, the products are not competitive enough for many of the large retail chains. These chains look for quality, volume, traceability, guaranteed and regular supply and low margins and subsequently are more or less forced to import these products from other countries.

The Greek market for fruits and vegetables is very important and could be one of the most promising sectors to benefit on short term from incentives like attractive investment facilities, support of the government and government structures and reforms to strengthen the competitive edge of the Greek horticultural sector.
Important tourist destination
It must be taken into consideration that Greece is an important tourist destination. Despite the crisis, Greece displayed a 9.5% increase in arrivals in 2011. This year, the reduced bookings from traditionally European key origin countries like Germany, UK, France and Italy have been replaced by increasing arrivals from Russia, Ukraine, Israel and China. Consequently, during the summer season consumption increases about 60% depending on the fluctuations of tourist arrivals.

Increasing domestic consumption
Consumption on the Greek market always had a tendency to orientate towards domestic fruits and vegetables, because local perception is that they are more natural and tasteful. During the last decade the market has changed rapidly due to the aggressive marketing strategy of the large retail chains with low prices for quality products, often imported. In the first period of the Greek recession, consumer behavior was price-sensitive and therefore purchasing imported products seemed logical. Now this has shifted completely, as the persisting economic recession has had its impact on consumer behaviour: 84% buys Greek products to support the Greek economy even if prices are higher and 93% have stated that they will continue to buy Greek products, especially food. A very interesting development is that well-known foreign food brands established for decades in Greece and large retail chains have rushed to adopt the “Made in Greece” by advertising extensively that their food products are produced on Greek land.

Young professional Greeks willing to return to the countryside
According to a report issued by the Greek Ministry of Agriculture in April 2012, about 1.5 million Greeks would respond positively on a return to the countryside. Of all respondents, 68% ever considered leaving the city and 19% have already taken the first steps to realize this type of movement. 48% of the people who consider leaving the cities are younger than 44 years. Two thirds of this group have completed studies at university. Furthermore, 70% of all respondents have indicated that they would accept lower pay for a better quality of life. The Ministry refers to the results of the study as a “drastic shift in the Greek society and lifestyle”.

The idea of pursuing a career and a rich city life seems increasingly less attractive for young, highly educated Greeks. The Ministry is planning a budget of 60 million euros as to accommodate future farmers with land. Furthermore, 4,000 people have already signed up to an initiative of the University of Thessaloniki, where small pieces of land are cheaply rented to cultivate and produce their own fruit and vegetables.
1.1.1

Quality aspects

Products that circulate in the Greek market, imported and domestic, are of high quality. Greek consumers have high quality standards and consume most of the fruits and vegetables unprocessed, so there is no space for lower quality products. This tendency was dominant until the economic crisis started and even despite the persisting recession, consumer priorities have not changed. The consumption on the Greek market will continue to value quality over price.

In order for a product to be circulated in the Greek market, it has to meet certain standards that have come in force since 2002 according to European regulations 1148/2001 and 1580/2006. These standards include rules on variety, size, shape, colour, homogeneity, sanitation standards, packaging and labeling standards etc. Greece has implemented these regulations and the agency responsible for the control of correct implementation is the Commercial Database. Implementation of the above mentioned standards is crucial for consumer confidence and product traceability.
1.2 Production and cultivation areas of fruits and vegetables

1.2.1 Fruits

In the tables and maps (appendix 1) you will find data on production volume, average price, cultivation surface, gross value and geographical orientation for the most popular fruits in Greece.

The mainly cultivated fruits are:
1. Citrus fruits (oranges, lemons, mandarins, grape fruit)
2. Peaches (for fresh produce but also for compost or juice processing), nectarines, apricots, cherries
3. Apples and pears
4. Grapes
5. Kiwis
6. Figs

1.2.2 Vegetables

In the tables and maps (appendix 2) you will find data on production, average price, cultivation, surface, gross value and geographical orientation for the most important vegetables in Greece.

The mainly cultivated vegetables are:
1. Tomatoes
2. Cucumbers
3. Sweet peppers
4. Aubergines
5. Watermelons
6. Melons
7. Potatoes
8. Asparagus
9. Dry onions
10. Brassicas
11. Carrots
12. Broccoli
13. Various lettuces

In the last few years, various lettuces are cultivated with the usage of hydroponic techniques.
1.2.3

Greenhouse sector

The first greenhouses in Greece were introduced by the Dutch agricultural engineer Paul Kuypers. The island of Syros and the region of Ierapetra in Crete were the first areas to pick up greenhouse cultivation. Presently, the majority, about 50% of greenhouses are located on the island of Crete with Ierapetra being the most important area, followed by Messara plain. The Peloponnese area holds another 25% of greenhouses. The remaining 25% are scattered throughout Greece with higher concentration near major city centers like Preveza, Athens and Thessaloniki.

The main crops that are cultivated in greenhouses in Greece are: tomatoes, cucumbers, sweet peppers, watermelons, melons and aubergines. Of these crops, peppers (horn type), cucumbers, watermelons and tomatoes are often export oriented cultivations.

The majority of producers follow two production cycles:
1. Autumn – winter cultivation: starts in August and continues until January
2. Spring – summer cultivation: starts in February and continues until September

For Crete, it is valid that both cultivations are unheated.

Greenhouses in Greece are affected by the following factors:
Positive factors:
• Favourable climate conditions provide opportunities to cut heating costs
• Again because of the favourable climate, opportunities are presented especially to export oriented growers in terms of filling the gaps that occur in European and other markets throughout the year.

Negative factors:
• High transportation costs because of the harsh geographical landscape
• Lack of professionalism, organization and know-how in a significant percentage of growers
• Due to socio-political reasons, land ownership remains fractured with a negative impact in organized production. Numerous efforts of cross-producer cooperation have so far failed.

However, a positive trend has recently surfaced and it concerns large investments in the greenhouse sector, some of which are funded by new players outside the market. These players are drawn in by the higher prices in comparison to other products and by the fact that the greenhouse sector currently stands for a relatively secure alternative to the battered real-estate and stock-exchange markets. Some major investments in greenhouses are:
• Agritex Energy SA - 10 ha glasshouse, Thessaloniki area
• Thermokipia Dramas SA – 10 ha glasshouse, Macedonia area
• Wonderplant – 12 ha greenhouse, Macedonia area

Below is presented the total surface (in ha) of greenhouses according to their type:

<table>
<thead>
<tr>
<th>Glasshouses</th>
<th>Standardized Metallic</th>
<th>Standardized Wooden</th>
<th>Standardized Mixed</th>
<th>Home Made Arched</th>
<th>Home Made Metallic</th>
<th>Home Made Wooden</th>
<th>Home Made Mixed</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Arched 760</td>
<td>Gabled 1.295</td>
<td>508</td>
<td>536</td>
<td>728</td>
<td>266</td>
<td>742</td>
<td>216</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5.136</td>
</tr>
</tbody>
</table>
1.2.4 Processing

The majority of fruits and vegetables produced in Greece are intended for direct consumption. Domestic consumers in general regard processed fruits and vegetables as of inferior quality products. Therefore, price is an important factor in processed fruits and vegetables.

The processing industries’ raw materials are mostly imported from other Balkan countries. The reason is that prices for fresh products are higher than for products intended for processing, as a result no party sees interest in this activity.

Notable exceptions to this concept are special types of processed fruits and vegetables produced by small scale industries, mixing traditional recipes, good quality and higher income target groups. Other exceptions are industrial tomatoes for tomato sauce, peaches for stewed fruits and citrus fruits for juices.

A recent change in demand that has had quick growth recently is for pre-made salads.
1.3 Mushrooms

In Greece, there are mainly two mushroom species cultivated on a commercial scale:

- *Agaricus bisporus*
- *Pleurotus ostreatus*

Since 2005, Agaricus' production has been decreased due to high production costs. Pleurotus' share in total production has increased from 12% in 2002 to 80% in 2008. Currently, Pleurotus production is about 2,400 tons, of which 50% are produced by a few large scale producers that produce their own substrate. The average total production per year is about 3,000 tons.

Currently, domestic production cannot satisfy the domestic demand that reaches about 10,000 – 12,000 tons per year. As a result, 7,000 – 9,000 tons are imported per year.

The main import countries are Poland, The Netherlands, Spain, Italy, China, Taiwan and Turkey.

Below is presented a concentration map of mushroom cultivation in Greece for the year 2007:
1.4

Potatoes

Because of the diversity of the Greek climate depending on the location, there is a broad production cycle span for the potato cultivation.

The sowing period according to the geographical location is:

- **December** for southern Crete
- **January** for northern Crete, lower altitude parts of the Peloponnese and Thebes area
- **February** for Central Greece
- **March** for the higher altitude area Tripoli of the Peloponnese, Amynteo area of western Macedonia, Macedonia and Thrace in general
- **April and early May** for the island of Naxos and Nevrokopi area of eastern Macedonia
- **August** for northern Crete, south – west parts of the Peloponnese and Thebes area (depending on variety and weather conditions)

Accordingly, we distinct three production cycles:

- **Spring cultivation (main cultivation)** for sowing between December and early April
- **Summer cultivation** for sowing in late April and early May
- **Autumn cultivation** for sowing in August

The harvest for the spring and summer cultivation begins in April for southern Crete and ends in August for Nevrokopi. The harvest for autumn cultivation begins in late November and continues until the end of December.

Production for the different cultivations, as well as a concentration map (surface in ha and production in tons) are presented below:

<table>
<thead>
<tr>
<th>Year</th>
<th>Spring Cultivation</th>
<th>Summer Cultivation</th>
<th>Autumn Cultivation</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Surface</td>
<td>Production</td>
<td>Surface</td>
<td>Production</td>
</tr>
<tr>
<td>2008</td>
<td>13.617</td>
<td>342.852</td>
<td>12.717</td>
<td>316.762</td>
</tr>
</tbody>
</table>
Major governmental institutions and main investment incentives

The Greek state still suffers when it comes to matters of organization, regulation and implementation of policy. Legislation is often confusing, contradictory and hard to understand. These facts often pose a threat to private initiatives. Agriculture is not an exception to this rule. However, over the last year we are observing positive changes in the way that major state agencies and institutions are organized as well new bureaucracy – breaking legislation passed with the guidance of EU and IMF consultants. With restructural reforms on their way for implementation, improvements should come along.

The major governmental institution responsible for implementing policies in the agricultural sector is the Ministry of Rural Development and Food (MRDF). The ministry plays a vital role in the following fruits and vegetables related fields:

- Granting licenses to import products from third party (non EU) countries
- Inspecting the phytosanitary conditions of farms and greenhouses
- Consulting with European officials in horticultural matters like subsidies, implementation of European policies and legislation etc.
- Implementing modernization campaigns and investing independently also in cooperation with the Ministry of Development and Competitiveness
- Supporting research through public research institutions

The ministry has a country wide presence through central agencies and departments and special and decentralized agencies. The ministry also has the supervision of a number of other agricultural related institutions and organizations. The most notable of these institutions are:

- Benakeio Fytopathological Institute: Its main purpose is to cover phytosanitary matters, but also to study and propose policies to the MRDF on safety and quality issues on agriculture and the minimization of agricultural activities’ impact to the environment.
- Geotechnical Chamber of Greece: Its main activities regard scientific consulting to the MRDF:
- National Organization for Agricultural Insurance (ELGA)
- National Agricultural Research Foundation (NAGREF)
- AGROCERT: This organization is responsible for the certification of agricultural production techniques, agricultural products and the supervision of other private certification institutions.
1.5.1

Main investment incentives

There are many investment incentives programmes in effect throughout the year. Most of them are too short term to be mentioned in this market special. We will focus in presenting the Investment Incentives Law (3908 / 2011) that is more long term and stable. However, we advise a check for new incentives anytime you choose to invest in order to benefit from current new incentives.

Main characteristics of the Investment Incentives Law (3908 / 2011):
- Contains a defined annual budget, making clear the allocation of financial resources, so that investors may plan accordingly.
- Provides for binding schedules, electronic submission, investment monitoring and new Investor Service Offices that assist investors
- Contains specified and fixed application deadlines (April and October)
- Introduces a new evaluation process by establishing the National Register of Evaluators and Auditors

### Investment categories

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General Entrepreneurship</td>
<td>Provides tax breaks of up to 100% of the maximum allowable amount of aid. All enterprises regardless of sector</td>
</tr>
<tr>
<td>2</td>
<td>Regional Cohesion</td>
<td>Provides all forms of aid. The subsidy rate and leasing subsidy may reach up to 70% of the maximum allowable amount of aid. For new enterprises this percentage is increased by 10 percentage points. Investors with projects that address local needs or capitalise on local competitive advantages.</td>
</tr>
<tr>
<td>3</td>
<td>Technological Development</td>
<td>Provides all forms of aid. The rate of subsidy and leasing subsidy may reach up to 80% of the maximum allowable amount of aid. Enterprises that invest in innovation and want to upgrade their technology infrastructure.</td>
</tr>
<tr>
<td>4</td>
<td>Youth Entrepreneurship</td>
<td>Provides aid for virtually all costs (including operational) for five years from the start of the business. Total aid may reach up to € 1.000.000 (One million euros). Investors from 20 to 40 years old</td>
</tr>
<tr>
<td>5</td>
<td>Large Investment Plans</td>
<td>Provides all forms of aid, either in one form or a combination of forms. The level of aid decreases as the amount of investment increases. The percentage of the subsidy may not exceed 50% of total aid. Investments with a budget of at least € 50.000.000 (fifty million euros).</td>
</tr>
<tr>
<td>6</td>
<td>Integrated, Multi-Annual Business Plans</td>
<td>Promotes technological, administrative, organisational and business modernisation. 100% of the maximum regional aid applicable shall be granted. Companies legally formed at least five years previous to application, to implement integrated multi-annual (2-5 year) business plans with a budget of at least € 2.000.000 in total (two million euros).</td>
</tr>
<tr>
<td>7</td>
<td>Partnerships and Networking</td>
<td>Provides for any form of aid. Partnerships and networking configurations or clusters. These clusters shall be comprised of at least ten enterprises in the Region of Attica and Thessaloniki Prefecture and of at least five enterprises in other prefectures, operating in the form of a consortium.</td>
</tr>
</tbody>
</table>

### Types of aid

a) Tax relief—Tax relief comprising of exemption from payment of income tax on pre-tax profits which result, according to tax law, from any and all of the enterprise’s activities.

b) Subsidy—Gratis payment by the State of a sum of money to cover part of the subsidised expenditure of the investment.

c) Leasing subsidy—Includes payment by the State of a portion of the installments paid under a leasing agreement executed to acquire new machinery and / or other equipment.

d) Soft loans by ETEAN (National Fund for Entrepreneurship and Development). The amount to be covered by a bank loan may be funded by soft loans from credit institutions that cooperate with ETEAN enterprises.

The aid referred above shall be aggregated for the purpose of determining the total amount of aid allocated to the investment project. In this case, the benefit of the funding above is included in total aid, which may not exceed the limits delineated on the Regional State Aid Map.

(See appendix for the attachments)
1.6

Main Players

1.6.1

Small farmers

Various socio-political and geographical reasons have led to significant fragmentation of land ownership in Greece. More specifically, about 95% of the cultivated surface is owned and operated by small farmers. The average size of land ownership for small farmers is about 0.1 – 0.4 ha.

Consequently, Greek horticulture suffers from well-known disadvantages to competitiveness, organization and professionalism that derive from fractured land ownership. The administration has tried to solve these negative effects by organizing producers groups, but their organization has often been problematic. In some cases, these groups have harmed competitive growers instead.

1.6.2

Commercial farmers

Below we present the most important commercial farmers in terms of cultivated area:

<table>
<thead>
<tr>
<th>Name</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agritex Energy SA</td>
<td>The company is located in Alexandria, Thessaloniki. It operates a 10 ha glass-house built with Dutch technology that combines hydroponic cultivation with energy production (CHP). The investment was subsidized by the Ministry of Development and is operational since 2007. The cultivation is concentrated in cluster tomatoes and the value of the investment was € 20.3 million when it was materialised in 2006.</td>
</tr>
<tr>
<td>A.K.S.F. «AGIANNAKI» - Michalakopoulos George</td>
<td>The farmer operates a 14 ha greenhouse in Kyparisia, Peloponnese and is focused on long cucumber and tomato crops.</td>
</tr>
<tr>
<td>Archatzikakis Bros</td>
<td>The farmers operate a 7 ha greenhouse in Sitia, Crete focused in tomato and melon crops and a 4 ha greenhouse in Elia, Peloponnese growing tomatoes and cucumbers.</td>
</tr>
<tr>
<td>Chatzakis bros</td>
<td>The farmers operate a 5 ha greenhouse in Ierapetra, Crete growing tomatoes and peppers.</td>
</tr>
<tr>
<td>Dounos bros</td>
<td>The farmers operate a 3.5 ha greenhouse in Filiatra, Peloponnese focused on tomatoes.</td>
</tr>
<tr>
<td>Georgiki Anaptixi SA</td>
<td>The company operates in an integrated business model “from seed to fruit” (seed distribution, young plant nursery, pesticides distribution etc.). It is located in Kyparissia, Messinia in the Peloponnese and the total cultivated surface is 4 ha.</td>
</tr>
<tr>
<td>Kallianis George</td>
<td>The farmers operate a 3 ha greenhouse in Kyparissia, Peloponnese focused on tomatoes.</td>
</tr>
</tbody>
</table>
Korovilas George
The farmer operates a 6 ha greenhouse in Kyparissia, Peloponnese and is focused on cucumber and tomato crops.

Milolidakis Polydoros
The farmer is located in Tymbaki, Messara, Crete. He operates a 5 ha glass-house and focuses on tomato and cucumber crops.

Poutselas Elias
The farmer operates a 3 ha greenhouse in Leonidio, Peloponnese. He focuses on tomato and cucumber crops.

Sechlos George
The farmer operates a 4 ha greenhouse in Kyparissia, Peloponnese and is focused on cucumber crop.

Skordilakis Iakovos
The farmer operates a 6 ha greenhouse in Chania, Crete growing tomatoes.

Stois George
The farmer operates a 5 ha greenhouse in Leonidio, Peloponnese. His crops focus on tomato and cucumber.

Tambakis bros
The farmers operate a 5 ha greenhouse in Ierapetra, Crete growing tomatoes, peppers and mini cucumbers.

Terzaki bros
The farmers operate a 5 ha greenhouse in Chania, Crete growing tomatoes and mini cucumbers.

The Green Club
The “Green Club” is a greenhouse growers’ organization trying to manage the reputation of their product in the market. The members have to follow specific obligations, such as hydroponic production, natural pollination of the flowers by bumble bees, application of the I.P.M (Integrated Pest Management) principles and Certification of the production process against ICM (Integrated Crop Management) standards such as GLOBALG.A.P. The greenhouses are located all over Greece and the total area counts 23 ha.

Thermokipia Dramas SA
The company is located in Drama, northern Greece and the main cultivation is coloured sweet peppers. The total surface is 10 ha glasshouse and the value of the investment was € 8.6 million when it was materialised in 2006.

Vardoulakis Antonios
The farmer operates a 6 ha greenhouse in Messara, Crete and is focused on cucumber, tomato and melon crops.

Wonderplant SA
The company is located in Drama, northern Greece and during 2011 it had its first crop cycle. The total investment value is € 23 million, with a € 7 million total subsidy from the Investment incentives Law. The main stock holders of the company are also involved in Goody’s SA, Everest SA and other major Horeca industries, hinting the attractive alternative that the fruit and vegetable sector poses as a destination sector for outsider players. The company has already secured a leased area of 40 ha and plans to move this autumn with their third cultivation (interplanting system) of 12 ha. The main crop is beef type tomatoes (80% of the area) accompanied with truss type (20% area) tomatoes.
It has been mentioned that the Greek fruit and vegetables sector suffers from high fragmentation of farm land. The first attempts to remedy this problematic situation failed dramatically in the 1980s. Corruption, lack of professionalism and poor management were the main reasons for failure. As a result, the idea of producer organizations still brings bad memories to mind and is often not favourably perceived by most small farmers, especially the most competitive ones.

Still notable exceptions of successful producer organizations exist and are mentioned below. Moreover, the persisting recession forces farmers to cooperate in similar forms.

<table>
<thead>
<tr>
<th>Producer Organization</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASEPOP Velventos</td>
<td>Production &amp; trade of peaches</td>
</tr>
<tr>
<td>KIKU Hellas</td>
<td>Production of special apple variety named KIKU traded under the “KIKU” brand</td>
</tr>
<tr>
<td>Kirros Agricultural Cooperative</td>
<td>Production of peaches, pears, pomegranates, cherries and kiwis</td>
</tr>
<tr>
<td>Kountoura Agricultural Cooperative</td>
<td>Production and trade of greenhouse tomatoes, cucumbers and peppers</td>
</tr>
<tr>
<td>Kritiko Pervoli</td>
<td>The organization was founded in 2008 in Ierapetra, Crete by ten members and in 2010 the number of members doubled to 20 with a combined cultivation surface of 15 ha. The organization’s output reached 2,500 tons for 2010.</td>
</tr>
<tr>
<td>Messi Coop</td>
<td>The organization was founded in 1971 and is gathering a great mass of fruit producers in the central Macedonian area. Its main focus is peaches and nectarines.</td>
</tr>
<tr>
<td>Notos Agricultural Cooperative</td>
<td>Notos was established in 2006 in Ierapetra, Crete. Their activities include cultivation, packaging and trading of special tomato types (truss, cocktail, kumato). The total crop covers a 15 ha greenhouse.</td>
</tr>
<tr>
<td>ZAGORIN – Agricultural Cooperative of Zagora Pilion</td>
<td>Production and trade of apples under the “ZAGORIN” brand</td>
</tr>
<tr>
<td><strong>Other local producer organizations</strong></td>
<td>Throughout Greece, many small producer organizations are scattered. They are successful, but still produce on a small scale for the domestic or foreign market. Their products are of high quality and many of them have great potential to grow.</td>
</tr>
</tbody>
</table>
1.6.4 Retailers

The Greek market is dominated by large retail chains. Many of them have been acquired by foreign retail chains. It is calculated that in 2010 about 90% of the total retail trade value was made in the largest retail chains. When it comes to fruits and vegetables this percentage is about 80 – 85%, the remaining percentage is divided between local markets and shops.

The major retail chains that are currently active nationwide in the Greek fruit and vegetable sector are:

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB Vasilopoulos</td>
<td>(owned by Belgian Delhaize Group)</td>
</tr>
<tr>
<td>Lidl SA</td>
<td>(discount retailer)</td>
</tr>
<tr>
<td>Makro cash &amp; carry</td>
<td>(brand name of a discount retailer, owned by Metro Cash and Carry)</td>
</tr>
<tr>
<td>Marinopoulos</td>
<td>(having the widest sales network)</td>
</tr>
<tr>
<td>Market in</td>
<td></td>
</tr>
<tr>
<td>My Market</td>
<td>(national chain, owned by Greek company METRO, not to be confused with the German owned Metro group)</td>
</tr>
<tr>
<td>Sklavenitis</td>
<td>(Greek owned, focus on Athens and other main cities)</td>
</tr>
<tr>
<td>Veropoulos</td>
<td>(Greek owned, part of SPAR, international retail franchise)</td>
</tr>
</tbody>
</table>

There are also mentioned some other chains that restrict their sales network to large cities or local geographical markets:

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arvanitidis</td>
<td>(northern Greece)</td>
</tr>
<tr>
<td>Chalkiadakis SA</td>
<td>(Crete), co-owned by Veropoulos SA</td>
</tr>
<tr>
<td>Doukas</td>
<td></td>
</tr>
<tr>
<td>Galaxias “Dimitra”</td>
<td>(Corfu), operates with its own brand</td>
</tr>
<tr>
<td>Masoutis</td>
<td>(northern Greece)</td>
</tr>
<tr>
<td>Thanopoulos</td>
<td>(Athens)</td>
</tr>
<tr>
<td>Trofino</td>
<td>(Athens)</td>
</tr>
</tbody>
</table>

Throughout Greece small retail chains have replaced the old supply - grocery stores. These small retail chains are too many to be mentioned, but act as central suppliers for their local sales network. These local chains operate with a mixed franchise-distribution method.
1.6.5

**Wholesalers**

The pattern that is followed throughout Greece is that most of the large wholesalers have established their facilities either near the main plains, where most of the farmland is concentrated or in the two major cities of Athens and Thessaloniki. Their facilities include warehouses and freezers and sometimes they join operations with transport companies.

The most notable wholesalers in Athens are:

- **Katzigiannis**
- **Lala Brothers**
- **Limpantsis SA**
- **Menelaos Import-Export**
- **Moraitis**
- **Pefanis**

All of them are established with offices in the central Athens wholesale market. Most of them distribute large quantities of goods for the domestic market.

The most notable wholesalers in northern Greece (Thessaloniki etc) are:

- **Fructa Union Ltd**
  The company has been dealing with fruit import-exports since 1965 and their headquarters are located in the central wholesale market in Thessaloniki.

- **Harma Fruit – C.H. Kelesidis & Partners**
  Harma Fruit was established in 2005 and deals with the import and export of fresh fruits and vegetables. The company currently distributes about 14,000 tons annually.

- **Karanikolas SA (Veria)**
  The company was established in 1963. The company’s basic products on a yearly basis are: cherries (1,800 tons), peaches (6,000 tons), nectarines (3,000 tons), apples (4,000 tons), kiwis (2,000 tons), plums (600 tons), pears (1,000 tons).

- **Katsiamakas SA (Naousa)**

- **Oporello – Lamproulis**
  Last year, the company completed a large-scale, modern investment in Larissa amounting € 23,000,000 by setting into operation the most modern unit of packing and storage of fresh fruit and vegetables.

The most notable wholesalers -with exporting focus- from the Crete area are:

- **Chrisanthos**
  This wholesaler is located in Ierapetra, Crete. His main focus is on cucumbers.

- **Giannakakis**
  This wholesaler is one of the largest in Greece and focuses mainly on cucumbers and grapes. His annual distribution output is about 20,000 tons. He is located in Tymbaki, Messara.

- **Lampros**
  This wholesaler is located in Chania, Crete. He operates a 2,500 square meters warehouse and focuses mainly on cucumbers and tomatoes.
George Rigakis
This wholesaler is located in Ierapetra, Crete. He owns a 4,000 square meter warehouse and focuses mainly on cucumbers and tomatoes.

Tsourdinis
This wholesaler is located in Tymbaki, Crete. He operates a 4,000 square meter warehouse and is focused on cucumbers, tomatoes and watermelons.

ZahaGold (Zahariadakis)
This wholesaler is located in Ierapetra, Crete. His main focus is cucumbers and sweet peppers.

1.6.6 Processors

As we have mentioned before, Greek consumers prefer to buy fruits and vegetables unprocessed. Therefore, the processing industry restricts itself in refrigerating the products.

New trends observed in the industry are the upcoming ready made salads and ready made meals with vegetables.

Alterra SA was founded in 2002 in Giannitsa, Macedonia. Currently, the company produces 15,000 tons of refrigerated fruits and vegetables. Recently, the company entered the market of private label in refrigerated fruits and vegetables. The company targets both consumers and food industries.

Barbastathis brand is the most recognizable in the market. The brand is owned by VIVARTIA SA, a member of Marfin Investment Group. The brand is involved in the production and distribution of frozen vegetables plain or mixed, ready-to-cook vegetable combinations, vegetables with rice, ready meals, pasta with vegetables meals, coated vegetable sticks & nuggets, as well as organic vegetables, herbs, tomato products, fresh salads and frozen dough products.

FreshCo brand by Limbatsis SA. The company operates a 10,000 square meter installation in Thebes, Central Greece. The company’s main products are pre-made fresh salads as well as fruit salads.

Fresh Farm brand by Eurofarm, is also concentrated on pre-made salads.

IFANTIS Group has recently entered the refrigerated vegetables market. The group is a major player in dairy and meat markets.

Other notable brands are: Freskoulis by Eurocatering, Agroktimata Thrakis, Veziroglou and private brands of the retail chains.

1.6.7 HoReCa

The Horeca sector is widely affected by tourism. Thus a surge in the sector’s activities is observed in the summer period. The hotels and restaurants have the tendency to supply locally through wholesalers and central vegetable markets. A national supply industry has not yet been developed.
1.6.8

Research & education

The current and past situation that describes research and education can explain why Greece, although a country with a strong agricultural background, has failed to develop a domestic agricultural input industry and is still extremely dependent on imported inputs.

The entire system of research and education in Greece is controlled and / or owned by the State. As a result, it is subject to the same flaws - fails, corruption, low productivity, preferential connections and general disarray, that characterizes every aspect of anything state owned or controlled in Greece.

A few bright exceptions of institutes or hubs in universities and technological institutes are not enough to make a difference.

Any Dutch businessman or manager relevant to the horticultural sector, would agree that a strong cooperation between research institutes and universities is crucial to the development of horticultural inputs industries; especially in the early stages, it is obvious where a significant part of the ailing Greek inputs sector lies.

We present below the most competitive research institutes (or at least institutes with competitive hubs) :

1. Agricultural University of Athens
2. Agricultural University of Thessaloniki
3. Agricultural University of Thessaly
4. Agricultural Department, Technological Educational Institute of Crete

Other well-known institutes are the Mediterranean Agronomic Institute of Chania (M.A.I.CH) and the Thessalonica Agriculture Institute.
### Fact sheet of the sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Production</strong></td>
<td><strong>Advantages</strong></td>
<td>Fractured land ownership. Average farm size for 95% of the farms is 0,1 - 0,4 ha.</td>
</tr>
<tr>
<td></td>
<td>Favourable climate conditions result in competitive products with good taste and quality, increased production and reduced heating costs</td>
<td>Poor organization of farmers, bad management, uninformed farmers</td>
</tr>
<tr>
<td></td>
<td>The sector has been amongst the least affected by the crisis. This is proven by new investments and projects that continue to be announced and implemented.</td>
<td>Due to small average land ownership, it is difficult to make investments in production - promotion - process - know how and have access to finance resources.</td>
</tr>
<tr>
<td></td>
<td>Attractive investment incentives for new projects by the Investment Incentives Law</td>
<td>Previous attempts to unite producers in cooperative organizations have failed. Corruption, bad management, preferential connections plagued the efforts. Currently, few successful cooperative enterprises exist.</td>
</tr>
<tr>
<td></td>
<td>Opportunity to take advantage of the favourable climate conditions and add a new production window for the Western European markets.</td>
<td>The favourable climate conditions present opportunities in the introduction of new subtropical cultivations, in order to diversify supply and production.</td>
</tr>
<tr>
<td></td>
<td>The favourable climate conditions present opportunities in the introduction of new subtropical cultivations, in order to diversify supply and production.</td>
<td>Cheap technological advancements are inaccessible to small farmers.</td>
</tr>
<tr>
<td><strong>Consumption</strong></td>
<td>Prices remain at good levels, despite the grim economic situation.</td>
<td>During the last two years, the Greek economy has fallen to recession. Effects are visible on all the sectors.</td>
</tr>
<tr>
<td></td>
<td>The average consumption per capita is amongst the highest in Europe.</td>
<td>The prices of domestic products continue to be high.</td>
</tr>
<tr>
<td></td>
<td>Consumers prefer domestic produced products.</td>
<td>It is hard to predict how consumers will react to the penetration of foreign cheap products taking into consideration the economic crisis.</td>
</tr>
<tr>
<td></td>
<td>Consumers are more sensitive to quality rather than price (until now).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consumption patterns in the Greek diet depend strongly on fruits and vegetables; as a result, consumption is not strongly affected by decreased income.</td>
<td></td>
</tr>
<tr>
<td><strong>Market</strong></td>
<td>Once the Greek market is approached, the Cypriot market (1 million more consumers / very strong Horeca sector) is very easily penetrated due to the common background.</td>
<td>Transportation costs are high because of rough terrain, poor infrastructure and low competition in the logistics market.</td>
</tr>
<tr>
<td></td>
<td>Proximity to the European markets</td>
<td>Unprofessional farmers tend to gamble for uncertain higher prices, rather than commit to contracted production.</td>
</tr>
<tr>
<td></td>
<td>Opportunities for foreign traders exist, because domestic traders and wholesalers already operate in large margins.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The large retail chains dominate the market, they set strict terms on delivery, quality and price. In order to meet these terms, producers are forced to organize themselves into groups and make investments.</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 2

Opportunities for the Dutch horticultural sector

2.1

Trade of fruits and vegetables

Fruits and vegetables exports represent about 35% of total exported agricultural products in value. They are by far the most competitive sector of agriculture in Greece. As we can see in the graph below, the trade balance is increasing on a stable basis:

For 2011, the exports’ value continues to grow and shows a 7.2% increase world-wide and a 30.2% increase to non EU countries. The exports’ value for EU countries has remained unchanged.

In terms of exported volumes the figures are even more promising, implying an increase in competitiveness as well.

For 2011, the volume of exported fruits and vegetables increased 22.8% world-wide, 17.4% to EU countries and 38.7% to non EU countries.

In the graph below, we present the exported volumes for 2009 and 2010:
The most exported fruits are apples, pears and mandarins.

Top EU exporting destinations for 2009 were Germany, United Kingdom, Italy, Romania and Holland. More specifically:

Exports Value in Euros

<table>
<thead>
<tr>
<th>Country</th>
<th>Value in Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>294,554,845</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>104,095,350</td>
</tr>
<tr>
<td>Italy</td>
<td>80,945,738</td>
</tr>
<tr>
<td>Romania</td>
<td>74,562,004</td>
</tr>
<tr>
<td>Holland</td>
<td>70,132,652</td>
</tr>
</tbody>
</table>

The most exported vegetables are cucumbers, tomatoes and sweet peppers.
2.2 Imports of fruits and vegetables

As we have seen above, Greece is an exporting country of fruits and vegetables. Domestic production is able to satisfy the domestic demand. More importantly until now, domestic consumers showed a clear preference for domestic products, as they are considered to be of better quality and taste.

The strong point of imported products, however, is their lower price. Some penetration of the market has been achieved so far. The value of imported products is, however, diminishing.

![Imports of Fruits and Vegetables in Euros](chart1)

Imports of Fruits and Vegetables in Euros

- 2009: 742,235,220
- 2010: 652,987,808

The volume of imported fruits and vegetables is also decreasing, in contrast to the exports.

We can observe that imports follow a different pattern from the exports:

![Imports of Fruits and Vegetables in Tons](chart2)

Imports of Fruits and Vegetables in Tons

- TOTAL 2009: 843,165
- TOTAL 2010: 709,274
- EU 2009: 515,758
- EU 2010: 426,625
- T/P 2009: 327,407
- T/P 2010: 282,449

Imports are decreasing both in value and in volume. We can draw the conclusion that domestic products are becoming more competitive, gaining ground in the market, phasing out imported products.
The major importing countries are **Italy, Germany, Holland, France** and **Belgium**.

More specifically:

Holland is an exporting country to Greece concerning fruits and vegetables, with a trade surplus of € 5,722,722.

Dutch products’ strong points are:

- Uniformity of production
- Contracted production
- Competitive price
- Timely delivery

All the points address demands that are set by the large retail chains. Demands that the average unorganized small Greek farmer is struggling to cope with.
2.3 Distribution and retail of fruits and vegetables

On the next page we present the structure of the Greek distribution and retail channels to the consumers:

The Greek distribution market is highly distorted. Because of small land ownership, the majority of producers don’t have the possibility to sell directly to large retail chains.

Those who can manage the cost of transportation, sell their products directly to consumers through local markets and enjoy a large profit margin.

Those who are unable to sell their products directly have two options. The co-operatively operated auction houses and the wholesalers.

The Auction Houses are operated by the Producers’ Organizations. Individual producers transfer their products and display them in a common exhibition room. The products are displayed with no identification of the seller’s identity. The buyers examine the products and offer prices for the auctions. After the products are sold, the producer receives his payment through the Auction House, which keeps a fee for the auction (about 5%-7%).

The producers’ second option is the wholesalers. Unfortunately, because they act as intermediaries and have to look after their own margin as well, they offer very low prices to the producers. Especially for the products destined for the domestic market.

Sometimes the producers can go directly to small retailers, but this is not done on a large scale.

It is clearly shown in the graph that because of the distorted nature of the market, there are ample opportunities for exporters and importers to bypass the middlemen and go directly to the large retail chains, or to large producers and producers organizations.
2.4

Main developments in the fruits and vegetables sector

This survey’s main conclusion is that the Greek fruits and vegetables market is changing faster than the majority of traditional players can cope with.

The modern large retail chains already dominate the market. These retail chains set demands on volume, high quality, traceability, reliable supply and low margins.

Structural, sociopolitical and geographical reasons have kept farmland fragmented and the average Greek producer unorganized, with amateur mentality and away from producer organizations that could help him bypass the obstacles of small ownership.

The current local production is adequate to supply small retailers. However, the supply of large retailers is increasingly dependent on imports because of the high standards they set and their demand for year-round supply. These demands cannot be met by the average Greek producer.

Domestic investors have identified the change in the market and have already started investing in new large and modern projects, taking advantage of the favourable climate conditions in terms of reduced heating costs, less interventions to the cultivation, the consequent superior quality of products and various investment incentives that are provided by the administration, with the most stable being the Investment Incentives Law, that has been presented in the current report.

Since 2006, three major multimillion investments have taken place and are already operational and profitable, with most of their production targeted to the domestic market.

The financial crisis has not stopped the momentum that has been built. On the contrary, the fruits and vegetables sector has emerged as an attractive alternative investment opportunity to the battered stock-exchange. We have presented the example of the Wonderplant SA, where the main stakeholders originated from the HoReCa sector.

We believe that the Dutch side is presented with two opportunities in the situation that is developing in Greece.

As the strength of the Netherlands horticulture sector is based on technology, innovation and logistics, the Dutch players are presented with the opportunity to participate in the forthcoming modernization of the Greek horticultural sector in order to meet the standards of the retail chains, providing know-how, inputs and innovative processes.

In the interest of Dutch exporters / importers / potential investors, Greece offers the opportunity to optimally make use of production window, in order to fulfill the demands of year-round supply. This window is a consequence of the Greek climate and conditions at certain times of the year, when all the other European areas are less competitive.
2.5

Opportunities for market entry and business development

Many Dutch companies are already active in the horticultural sector of Greece. Despite the financial crisis of the country, the agricultural sector seems less affected. Greek and foreign investors are looking for alternatives and consider the agricultural sector less risky.

As the strength of the Netherlands horticulture sector is based on technology, innovation and logistics, Dutch Agribusiness could play an important role to assist in the further development of the Greek horticultural sector, in order to meet the standards of the retail chains and to strengthen the competitive edge of the Greek horticultural sector by enabling Greece to export horticultural products once again.

On February 7th, 2013, The Economist Events will organize an Agricultural Business Summit in Thessaloniki with the theme “Accelerating growth and competitiveness for Greece”. The conference shall focus on the investment opportunities in the Greek agricultural sector.

The Dutch Embassy in Athens has asked the Agricultural Counsellor and the Ministry of Economic Affairs, Agriculture and Innovation to use this momentum for a Dutch trade mission on agribusiness to Greece. The goal of this mission will be to explore the opportunities of the promising Greek horticultural sector. During this conference, trade mission company visits and networking events can be organized in parallel to the conference sessions.
Chapter 3

Contact details

Main key players

Retailers, Supermarkets, Discount stores

AB Vasilopoulos SA
Leoforos Spaton 81, Athens
T: 0030 210 6608000
F: 0030 210 6612675
www.ab.gr

Arvanitidis SA
4th km Veroias - Larissas
T: 0030 23310 2246
F: 0030 23310 23071
info@arvanitidis.com.gr
www.arvanitidis.com.gr

Carrefour Marinopoulos SA
Ag. Dimitriou 63, Athens
T: 0030 210 9893400
F: 0030 210 9893780
Carrefour_Greece@carrefour.com
www.carrefour.com

Carrefour Marinopoulos Cyprus SA
Spirou Kiprianou 11, Lemesos
T: 0035 725316816
F: 0035 725312287
carrefour_cyprus@carrefour.com
www.carrefour.cy.com

Lidl co.
14th km Mixanionas, Thessaloniki
T: 0030 800 111 3333
info@lidl.gr
www.lidl.gr

Makro Cash & Carry Hellas
L. Kifisou 98 & Petrou Ralli
T: 0030 210 3496500
F: 0030 210 3479697
info@makro.gr
www.makro.gr

Masoutis SA
14th km Vassilika, Thessaloniki
T: 0030 2310 803803
F: 0030 2310 803804
www.masoutis.gr

Sklavenitis SA
L. Kifisou 80, Athens
T: 0030 210 5739036
F: 0030 210 5761833
info@sklavenitis.gr
www.sklavenitis.gr

Thanopoulos SA
Char. Trikoupi 164, Athens
T: 0030 210 6254504
F: 0030 210 6254949
info@thanopoulos.gr
www.thanopoulos.gr

Veropoulos SA
T: 0030 210 2893100
F: 0030 210 2893380
info@veropoulos.gr
www.veropoulos.gr

Wholesalers

Giannakakis SA
Timbaki, Crete
T: 0030 28920 51660
F: 0030 28920 52940
ggianak@otenet.gr

Kefalas Co. - Lion fruit
Ierapetra, Crete
T: 0030 28420 41066
F: 0030 28420 41418
lionfruit@in.gr

Lala Brothers SA
B-29 Central Vegetables Market, Athens
T: 0030 210 4833048
0030 210 4823251

Marinos SA
Ierapetra, Crete
T: 0030 28420 41630
F: 0030 28420 41382

Pefanis SA
L. Kifisou 85, Athens
T: 0030 210 4833745
F: 0030 210 4833745
sales@pefanis.com.gr
www.pefanis.com.gr

Perakakis Co. - Oscar art
Ierapetra, Crete
T: 0030 28420 28535
F: 0030 28420 27355

George Rigakis SA
Ierapetra, Crete
T: 0030 28420 90500
F: 0030 28420 90505
info@rigakis.eu
http://rigakis.eu

Siggelakis Chrisanthos SA
Ierapetra, Crete
T: 0030 28420 23626
F: 0030 28420 26306
info@cssa.gr
www.cssa.gr

Tsourdinis co.
Timbaki, Crete
T: 0030 28920 53396
F: 0030 28920 53397
tsourdinis@hol.gr

Zaha Gold (Zahariadakis)
Ierapetra, Crete
T: 0030 28420 41464
F: 0030 28420 41380
zaha_gold@yahoo.gr
www.zahagold.gr
Producer Organizations

AS Anatoli
Ierapetra, Crete
T: 0030 28420 27540
F: 0030 28420 89573
http://asanatoli.gr

AS Archanes
Archanes, Crete
T-F: 0030 2810 753200
sinar@otenet.gr

AS Kountoura
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T: 0030 28230 41866
F: 0030 28230 41816
koundoura@cha.forthnet.gr
www.opakountoura.gr

AS Notos – Notosfresh
Ierapetra, Crete
T: 0030 28420 31222
F: 0030 28420 31344
info@notosfresh.gr
www.notosfresh.gr

AS Timbaki
Timbaki, Crete
T: 0030 28920 52427
F: 0030 28920 52663
ast@mir.forthnet.gr

Kritiko Pervoli
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www.kritikopervoli.gr

Messi coop
Messi, Imathia
T: 0030 23310 43438
mesi@otenet.gr
www.asmesis.gr

Processors

Agroktimata Thrakis SA
4th km Toksoton-Olviou, Thrace
T: 0030 25410 95077
F: 0030 25410 95078
info@agrothra.gr
www.agrothra.gr

Alterra SA
Semertzidi 5, Pella, Macedonia
T: 0030 23820 81123
F: 0030 23820 22699
info@alterra.gr
www.alterra.gr

Barbastathis (Vivartia)
AS Street, Sindos, Thessaloniki
T: 0030 2310 798483
www.vivartia.com
www.barbastathis.gr

FreshCo (Limpantis SA)
79th km Lamia – Athens highway
T: 0030 22620 85500
F: 0030 22620 85501
www.freshco.gr
www.limpantis.gr

Freshfarm (Eurofarm SA)
1rst km Alexandreia–Verroia highway
T: 0030 23330 25075
F: 0030 23330 27266
info@eurofarm.gr
www.freshfarm.gr
www.eurofarm.gr

Freskoulis (Eurocatering SA)
Nerantzoulas 21, Athens
T: 0030 210 2400869
F: 0030 210 2400870
info@eurocateringsa.gr
www.eurocateringsa.com

IFANTIS SA
Seneka 4, Athens
T: 0030 210 819600
F: 0030 210 8077644
info@ifantis.gr
www.ifantis.gr

Veziroglou co.
Alexandreia, Imathia
T: 0030 23330 26690
F: 0030 23330 27381
info@vezyrogloufarm.com
www.vezyrogloufarm.com

Major Universities and Research Institutes

Agricultural University of Athens
Iera Odos 75, Athens
T: 0030 210 5294860
F: 0030 210 5294873
elke@aua.gr
www.aua.gr

Department of Agriculture
Aristotle University of Thessaloniki
T: 0030 2310 995187
info@agro.auth.gr
www.agro.auth.gr

M.A.I.CH.
Mediterranean Agronomic Institute of Chania, Crete
T: 0030 28210 35000
info@maich.gr
www.maich.gr

Thessalonica Agricultural and Industrial Institute
(known as the American Farm School)
T: 0030 2310 492700
info@afs.edu.gr
www.afs.edu.gr
Chapter 4

Main fairs and exhibitions in the fruits and vegetables sector in Greece

<table>
<thead>
<tr>
<th>PLACE</th>
<th>DATE</th>
<th>NAME OF EXHIBITION</th>
<th>INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thessaloniki</td>
<td>February (every 2 years)</td>
<td>Agrotica</td>
<td><a href="http://www.helexpo.gr">www.helexpo.gr</a></td>
</tr>
<tr>
<td>Athens</td>
<td>March (every year)</td>
<td>Athens Fruit Expo</td>
<td><a href="http://www.athensfruitexpo.gr">www.athensfruitexpo.gr</a></td>
</tr>
<tr>
<td>Athens</td>
<td>June (every year)</td>
<td>AgroQuality Festival</td>
<td><a href="http://www.agroqualityfestival.gr">www.agroqualityfestival.gr</a></td>
</tr>
</tbody>
</table>

Chapter 5

Information sources

- Invest in Greece agency: www.investingreece.gov.gr
- Ministry of Development: www.mindev.gov.gr
- Ministry of Rural Development and Food: www.minagric.gr
- Hellenic Foreign Trade Board: www.hepo.gr
- Exporters’ Association of Crete: www.crete-exporters.com
- National Agricultural Research Foundation: www.nagref.gr
- Central Union of wine and vine producers: www.keosoe.gr
- Incofruit Hellas: www.incofruit.gr
- Eurostat: epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home
- Hellenic Statistical Authority: www.statistics.gr/portal/page/portal/ESYE
- Association of Greek Export & Distribution Business of Fruit, Vegetables & Juices: www.incofruit.gr
- National and local media
- Direct interviews with main stakeholders and market players

Chapter 6

Acknowledgements

We would like to express our gratitude to the following persons for their contribution to this survey:

Mr. George Rigakis, Founder of Rigakis Seeds SA.
Mr. Alexandros Kapakas, Director of Commercial Operations, Rigakis Seeds SA.
Mrs. Siwarde J. Sap, Sr. Economic and Trade Advisor, Embassy of the Kingdom of the Netherlands in Greece
Mr. Herman van Wissen, Former Agricultural Counsellor for Romania, Bulgaria and Greece for the Netherlands Ministry of Economic Affairs, Agriculture and Innovation
Mr. Christos D. Katsanos, Executive Director, DKG Group Ltd.
Mr. Nikos Efthymiadis, Honorary Consul of the Kingdom of the Netherlands in Greece, Thessaloniki
Mr. Ioannis Vardinogiannis, Honorary Consul of the Kingdom of the Netherlands in Greece, Crete
Appendix 1

In the following tables and maps we present data on production volume, average price, cultivation surface, gross value and geographical orientation for the most popular fruits in Greece:

### Oranges

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated trees</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>16.210.688</td>
<td>727.100</td>
<td>0,18</td>
</tr>
<tr>
<td>2009</td>
<td>15.554.913</td>
<td>969.665</td>
<td>0,15</td>
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</table>

### Lemons

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated trees</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>3.417.942</td>
<td>26.900</td>
<td>0,76</td>
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<tr>
<td>2009</td>
<td>4.117.946</td>
<td>33.247</td>
<td>0,44</td>
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### Mandarins

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated trees</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
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</thead>
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<tr>
<td>2008</td>
<td>3.433.825</td>
<td>59.800</td>
<td>0,45</td>
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<tr>
<td>2009</td>
<td>3.570.564</td>
<td>91.645</td>
<td>0,39</td>
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### Peaches

<table>
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<tr>
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<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
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<tbody>
<tr>
<td>2008</td>
<td>17.806.424</td>
<td>746.217</td>
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<tr>
<td>2009</td>
<td>17.802.639</td>
<td>733.922</td>
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### Cherries

<table>
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<tr>
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<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>2.220.576</td>
<td>51.735</td>
<td>2,15</td>
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<td>2009</td>
<td>2.320.014</td>
<td>44.712</td>
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### Apples

<table>
<thead>
<tr>
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<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>7.436.053</td>
<td>240.340</td>
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<tr>
<td>2009</td>
<td>7.986.008</td>
<td>231.533</td>
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### Pears

<table>
<thead>
<tr>
<th>Year</th>
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<th>Avg. Price (€/kg)</th>
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</thead>
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<tr>
<td>2008</td>
<td>3.915.721</td>
<td>52.581</td>
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<tr>
<td>2009</td>
<td>3.864.232</td>
<td>49.974</td>
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### Kiwifruits

<table>
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<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>5.739</td>
<td>103.926</td>
<td>0,53</td>
</tr>
<tr>
<td>2009</td>
<td>5.963</td>
<td>113.142</td>
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### Strawberries

<table>
<thead>
<tr>
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<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
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</thead>
<tbody>
<tr>
<td>2008</td>
<td>644</td>
<td>20.645</td>
<td>2,73</td>
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<tr>
<td>2009</td>
<td>414</td>
<td>13.845</td>
<td>1,21</td>
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</table>
Below are presented concentration maps of fruit crops in Greece for the year 2007.

Percentage concentration of a cultivation in a prefecture is represented by different colour variations as follows:

- Over 51%
- Between 26% and 50%
- Between 16% and 25%
- Between 6% and 15%
- Under 5%
- 0%

**Fruit Crops:**
- Oranges
- Lemons
- Mandarins
- Peaches
- Cherries
- Apples
- Pears
- Kiwifruits
Appendix 2

In the following tables and maps we present data on production volume, average price, cultivation surface, gross value and geographical orientation for the most popular vegetables in Greece:

**Tomatoes**

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>22.909</td>
<td>1.826.170</td>
<td>0,33</td>
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<tr>
<td>2009</td>
<td>22.904</td>
<td>1.827.625</td>
<td>0,36</td>
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</table>

**Industrial tomatoes**

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>14.800</td>
<td>780.000</td>
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**Tomato Greenhouse cultivation**

<table>
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<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
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</thead>
<tbody>
<tr>
<td>2007</td>
<td>3.400</td>
<td>262.000</td>
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**Tomato Open-field cultivation**

<table>
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<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>14.800</td>
<td>422.000</td>
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</table>

**Cucumbers**

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<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2.269</td>
<td>187.294</td>
<td>0,73</td>
</tr>
<tr>
<td>2009</td>
<td>2.214</td>
<td>175.440</td>
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**Sweet peppers**

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>3.854</td>
<td>139.693</td>
<td>0,95</td>
</tr>
<tr>
<td>2009</td>
<td>3.728</td>
<td>133.416</td>
<td>0,80</td>
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**Aubergines**

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>2.232</td>
<td>56.639</td>
<td>0,71</td>
</tr>
<tr>
<td>2009</td>
<td>2.242</td>
<td>58.934</td>
<td>0,91</td>
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**Watermelons**

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<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>12.837</td>
<td>593.691</td>
<td>0,33</td>
</tr>
<tr>
<td>2009</td>
<td>12.673</td>
<td>582.911</td>
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**Melons**

<table>
<thead>
<tr>
<th>Year</th>
<th>Cultivated surface (ha)</th>
<th>Production (tons)</th>
<th>Avg. Price (€/kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>5.539</td>
<td>148.125</td>
<td>0,58</td>
</tr>
<tr>
<td>2009</td>
<td>5.526</td>
<td>147.775</td>
<td>0,57</td>
</tr>
</tbody>
</table>
Below are concentration maps of vegetable crops in Greece for the year 2007.

Percentage concentration of a cultivation in a prefecture is represented by different colour variations using the same scale as previously used in fruits:

- Over 51%
- Between 26% and 50%
- Between 16% and 25%
- Between 6% and 15%
- Under 5%
- 0%

- Industrial Tomatoes
- Tomatoes Greenhouse cultivated
- Tomatoes open-field cultivated
- Cucumbers - Sweet peppers
- Aubergines
- Watermelons
- Melons
Appendix 3

Regional State Aid Programme

<table>
<thead>
<tr>
<th>Region</th>
<th>Prefecture</th>
<th>Zone</th>
<th>Percentage of aid</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Large enterprises</td>
</tr>
<tr>
<td>Eastern Macedonia/Thrace</td>
<td>Kavala</td>
<td>C</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Xanthi</td>
<td>C</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Rodopi</td>
<td>C</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Drama</td>
<td>C</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>Evros</td>
<td>C</td>
<td>40%</td>
</tr>
<tr>
<td>Central Macedonia</td>
<td>Thessaloniki</td>
<td>B</td>
<td>30%</td>
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<tr>
<td></td>
<td>Halkidiki</td>
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</tr>
<tr>
<td></td>
<td>Kilkis</td>
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<tr>
<td></td>
<td>Pella</td>
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<tr>
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<td>Imathia</td>
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<tr>
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<td>Pieria</td>
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<td>30%</td>
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<tr>
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<tr>
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<tr>
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<td>Kastoria</td>
<td>C</td>
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</tr>
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<td>Florina</td>
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<tr>
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<tr>
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<td>Thesprotia</td>
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<tr>
<td>Epiros</td>
<td>Ioannina</td>
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<td>Arta</td>
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<tr>
<td>Region</td>
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