



C o n s u m p t i o n M o n i t o r



FRESHFEL  
Fresh Fruit and Vegetables  
Production, Trade, Supply and  
Consumption Monitor in the EU-28

*Based on statistical data from 2014*



freshquality  
YOUR GUIDE TO EU FRESH PRODUCE LAW



Enjoy Fresh  
Fruits & Vegetables



**TOTAL GROSS SUPPLY AND RELATED PRODUCTION & TRADE TRENDS EU-28**

## 1. MAIN FINDINGS

### 1.1. TOTAL GROSS SUPPLY AND RELATED PRODUCTION AND TRADE TRENDS – EU-28

In this section, we compare statistics on the production, export and import of fruits and vegetables in the EU-28, with a view to determining the total gross supply. The total supply is calculated as follows: **Total Supply = Total EU Production\* + Total Imports\*\* - Total Exports\*\***

(\*Source: FAOSTAT data - \*\*Source: EUROSTAT data)

The fruit production information presented in this document covers the following FAOSTAT headings: *Apples; Apricots; Avocados; Bananas; Cherries (inc. sour cherries); Citrus fruit, nec; Cranberries, blueberries; currants and gooseberries; Dates; Figs; Fruit, nec (inc. persimmons); Grapefruit and pomelos; Grapes; Guavas, mangoes, mangosteens; Kiwi fruit; Lemons and limes; Oranges; Other melons (inc. cantaloupes); Papayas; Peaches and nectarines; Pears and quinces; Pineapples; Plantains; Plums and sloes; Raspberries and other berries; Strawberries; Tangerines, mandarins, clementines; Watermelons.*

Similarly, the vegetable production information presented in this document covers the following FAOSTAT headings: *Artichokes; Asparagus; Beans (inc. string beans), green; Cabbages and other brassicas; Carrots and turnips; Cauliflowers and broccoli; Chillies and peppers, green; Cucumbers and gherkins; Eggplants (aubergines); Garlic; Leeks, other alliaceous vegetables; Leguminous vegetables, nec; Lettuce and chicory; Mushrooms and truffles; Onions (inc. shallots); Peas, green; Pumpkins, squash and gourds; Spinach; Tomatoes; Vegetables, nec (inc. okra).*

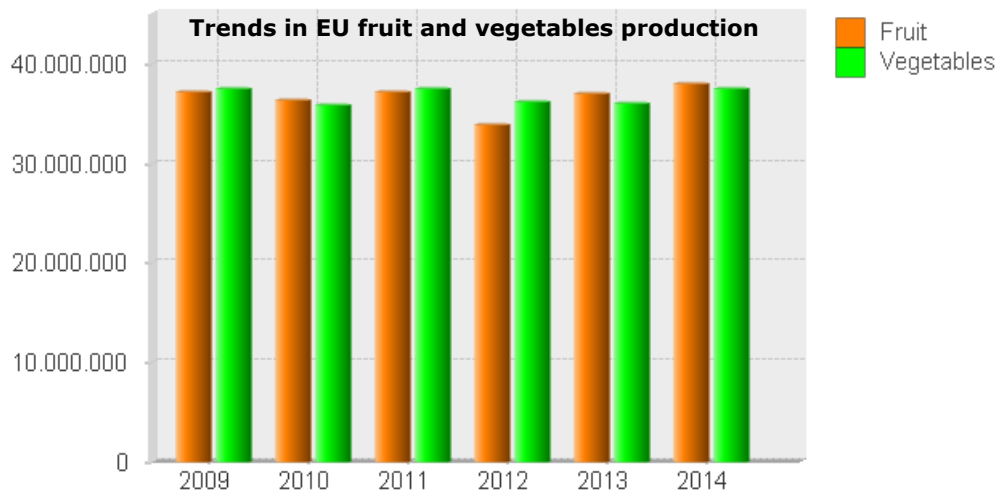
In order to adjust the information provided by different sources (FAOSTAT for production figures and EUROSTAT for import/export figures) the fruit import/export data presented in this report refer to the aggregate of the following CN codes: *0803 - Bananas, incl. plantains, fresh or dried; 0804 - Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried; 0805 - Citrus fruit, fresh or dried; 0806 - Grapes, fresh or dried; 0807 - Melons, incl. watermelons, and papaws "papayas", fresh; 0808 - Apples, pears and quinces, fresh; 0809 - Apricots, cherries, peaches incl. nectarines, plums and sloes, fresh; 0810 - Fresh strawberries, raspberries, blackberries, black, white & red currants, gooseberries and other edible fruits (excl. nuts, bananas, dates, figs, pineapples, avocados, guavas, mangoes, mangosteens, papaws "papayas", citrus fruit, grapes, melons, apples, pears, quinces, apricots, cherries, peaches, plums and sloes).*

Similarly, the vegetable import/export data contained in this report refer to the aggregate of the following CN codes: *0702 - Tomatoes, fresh or chilled; 0703 - Onions, shallots, garlic, leeks and other alliaceous vegetables, fresh or chilled; 0704 - Cabbages, cauliflowers, kohlrabi, kale and similar edible brassicas, fresh or chilled; 0705 - Lettuce "lactuca sativa" and chicory "cichorium spp.", fresh or chilled; 0706 - Carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots, fresh or chilled; 0707 - Cucumbers and gherkins, fresh or chilled; 0708 - Leguminous vegetables, shelled or unshelled, fresh or chilled; 0709 - Other vegetables, fresh or chilled (excl. potatoes, tomatoes, alliaceous vegetables, edible brassicas, lettuce "lactuca sativa" and chicory "cichorium spp.", carrots, turnips, salad beetroot, salsify, celeriac, radishes and similar edible roots, cucumbers and gherkins, and leguminous vegetables).*

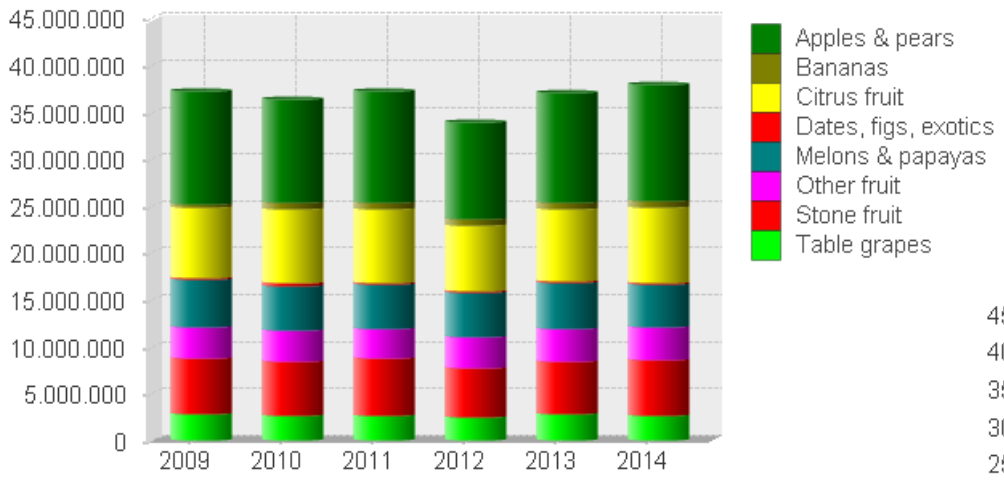
Taking into account that FAOSTAT production data does not distinguish between what is destined for fresh or transformed consumption (e.g. canned or pureed tomatoes, grapes for juice/wine, citrus fruit or apples for juice, canned stone fruit), and according to data provided by the sector, for grapes, citrus fruit and apples only a certain percentage of the production has been considered as destined for fresh consumption. In the case of tomatoes, figures are based on the European Commission “Working Group on Tomatoes” document (AGRI-C2/TOM18), providing data of supply of tomatoes destined for fresh consumption. In the case of stone fruit, figures are similarly based on the European Commission “Working Group on Peaches and Nectarines” document (AGRI-C2/PEC18). Next to these standard processing factors, the Consumption Monitor was adjusted to outbalance some of the clearly faulty data. As such, other processing factors were added for other categories of vegetables and in some cases to specific products for specific country to carefully outbalance incorrect consumption outcomes. The data behind the results of this report also takes into account a percentage for produce wastage, which according to expert data by the sector accounts for an average of 20% of gross supply. This percentage is therefore deducted from the total supply to come to the net consumption figures.

In the country by country reports, reference is made to extra and intra data for imports and exports. Extra refers to produce from outside the EU-28 (in the case of imports) or destined for countries outside the EU-28 (in the case of exports). Intra refers to produce traded within the EU-28, regardless of its origin and provided that it is custom cleared in the EU-28, in the case of produce from third countries. When analysing export and import trends in the country by country section, mainly the extra imports and exports have been analysed, although graphics are provided for both extra and intra. For the purpose of clarity, this report uses tonnes in the metric system, that is 1 tonne (T) = 1.000 Kg. Furthermore, the evolution of the gross per capita consumption takes into account the evolution of the population in the EU-28 Member States. Population data used in this report comes from EUROSTAT.

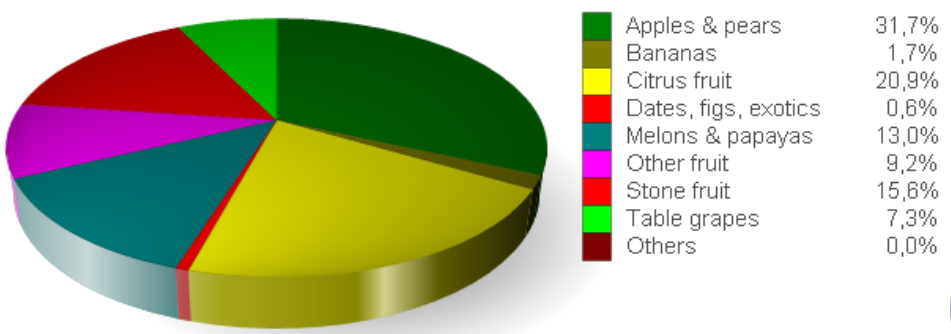
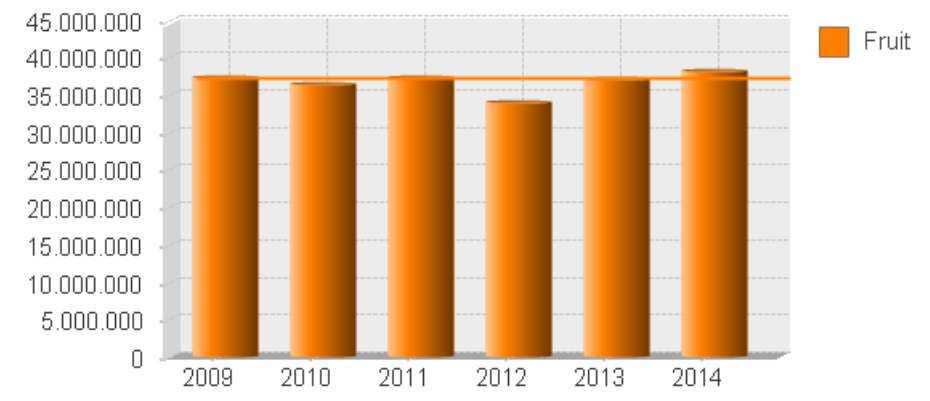
### 3.1.1. PRODUCTION



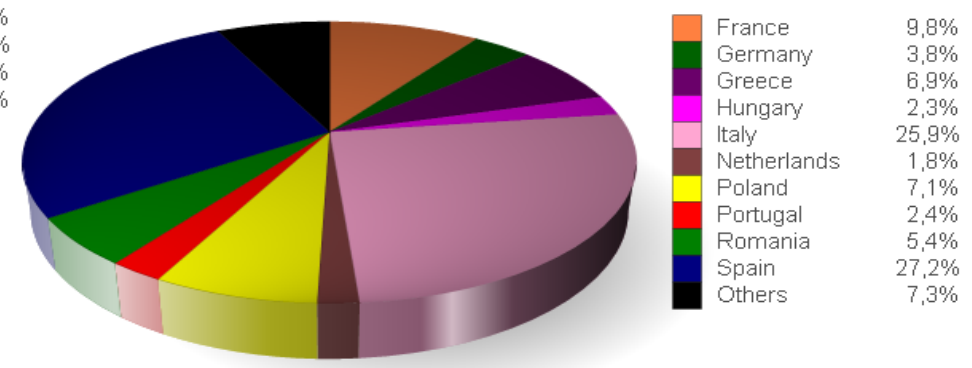
The EUROSTAT database does not yet publish reliable, comparable or timely information on the production of fruits and vegetables in Europe. We therefore use the FAOSTAT database for the identification of production trends in the EU. The information is presented per calendar year.



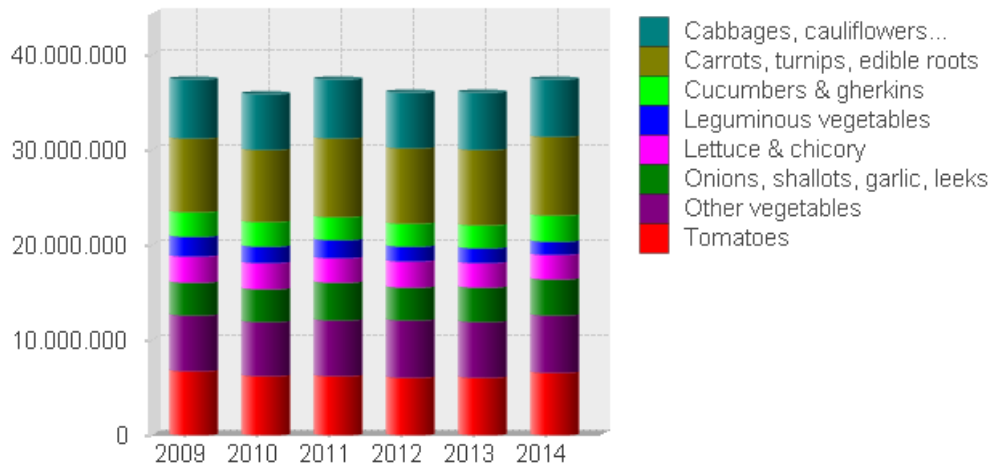
The comparison of the total production of fruit and vegetables shows that in 2014, the *production of fresh fruit* in the EU increased 2.6% compared to 2013, and increased 4.5%, compared to the average of the last five years (2009-2013), to reach a total of 37.97 mln T. The increase compared to last year was due to a good production year overall, except for melons and papayas (-8.9%) and table grapes (-6.9%).



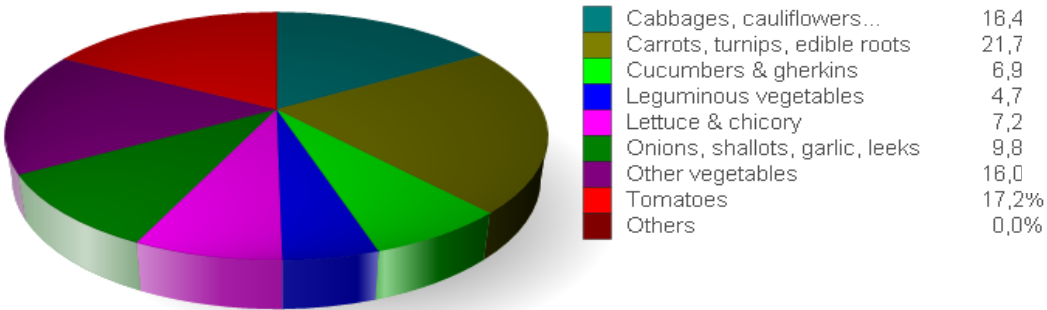
Trends in EU Fruit Production by product



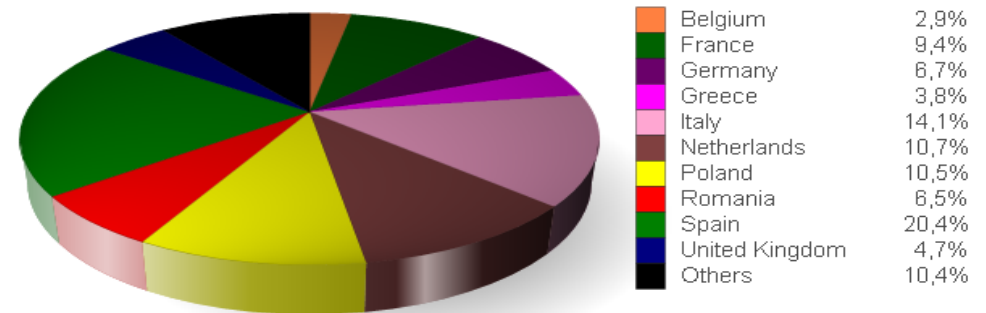
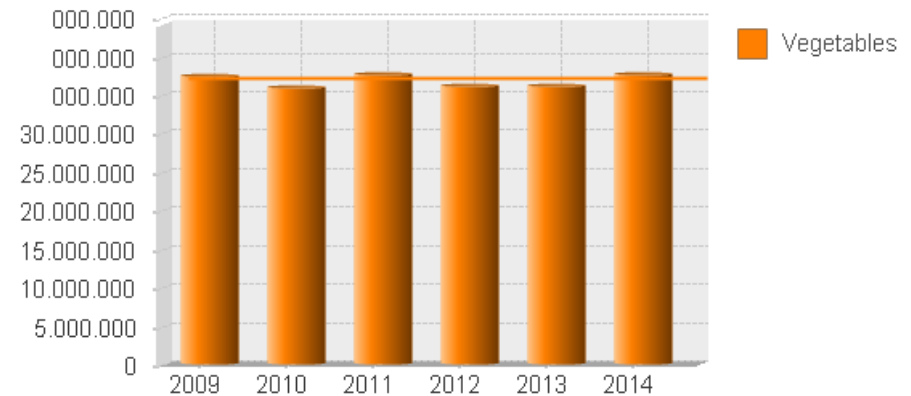
Trends in EU Fruit Production by country



The *production of fresh vegetables* in the EU increased 4.1% compared to 2013, and increased 2.3%, compared to the average of the last five years (2009-2013), to reach a total of 37.47 mln T. The increase compared to last year was due to a good production year overall for all vegetable categories, except for leguminous vegetables (-1%) and lettuce and chicory (-3%). The main growing categories over the past five years are onions, shallots and garlic (+6.9%) and cucumbers and gherkins (+6.8%).



Trends in EU Vegetables Production by product



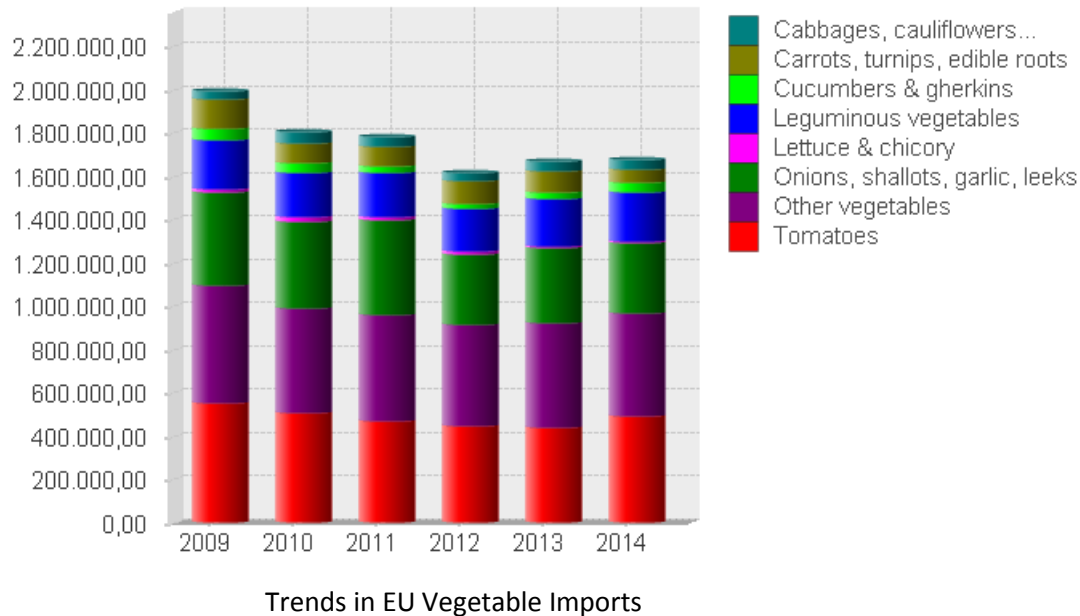
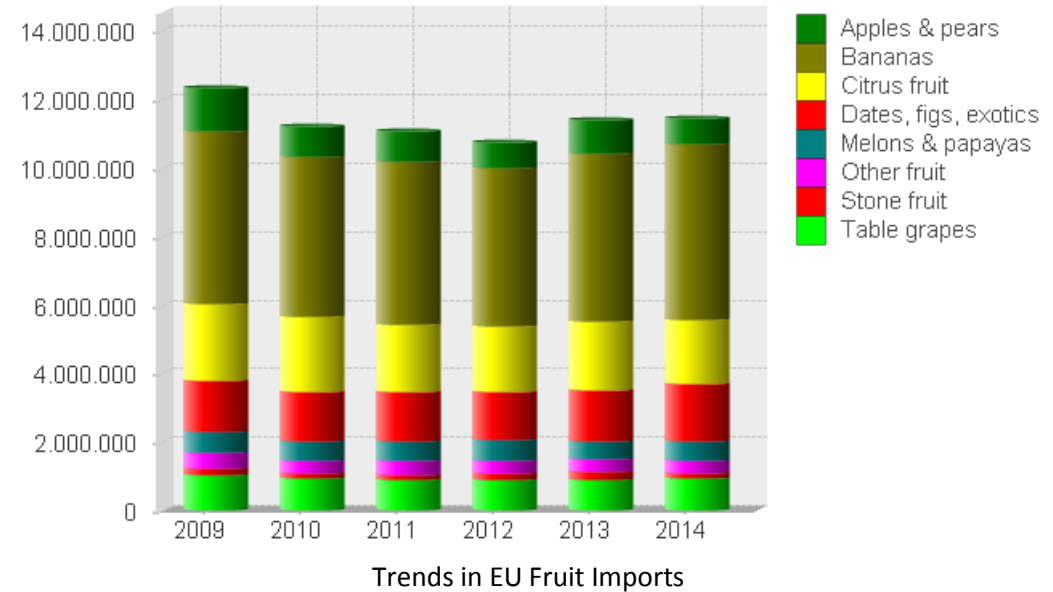
Trends in EU Vegetables Production by country

### 3.1.2. TRADE



#### Imports

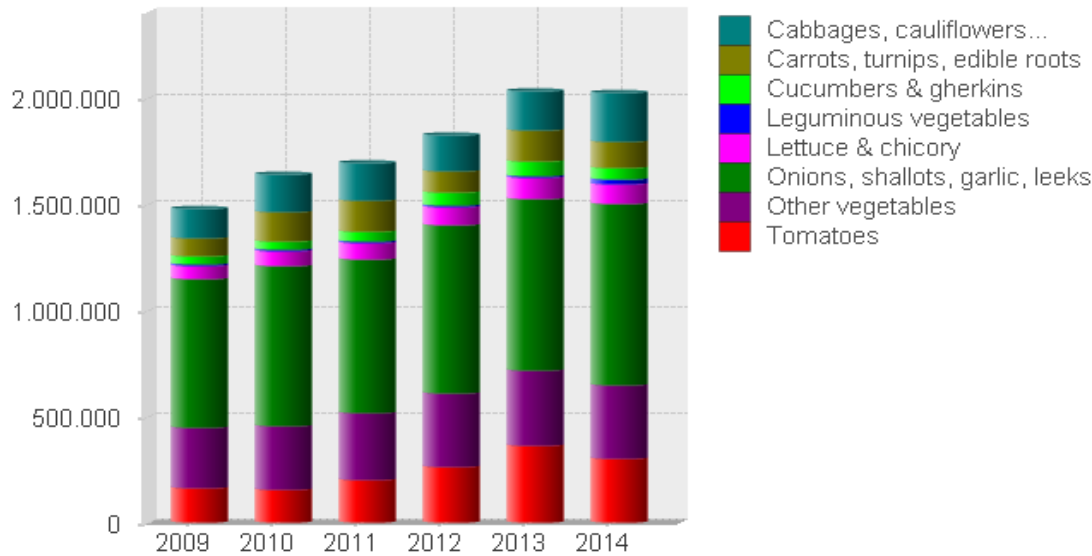
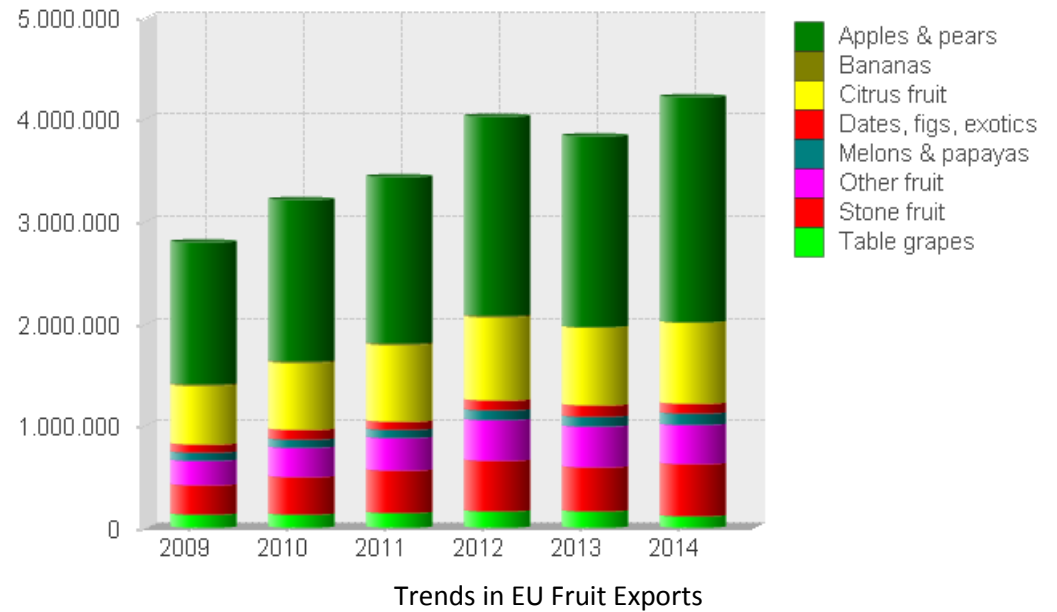
a) *Imports of fruit* originating in third countries increased slightly by 0.5% between 2013 and 2014, reaching a total of 11.43 mln T. Compared with the average of 2009-2013, this also represents a small increase of 0.9%. In 2014, there were more imports of melons and papayas (9.4%) and dates, figs, exotics (incl. pineapple, avocados, etc.) (9.9%), compared to 2013, whereas stone fruit (-27.8%) and apples and pears (-23%) decreased. Compared to the average of 2009-2013, apple and pear imports decreased by 22.6% and stone fruit decreased with 20%, whereas the exotic category was increasing by 11.4%. Bananas still make up the largest share of fruit imports with 5.1 mln T., which is up 4.2% in 2014 compared to 2013 and up 6.5% in comparison with the last five years.



b) In 2014, the *imports of vegetables* originating in third countries increased slightly compared with 2013 (0,6%), to 1.67 mln T. Compared to 2009-2013, the vegetable imports actually a decreased by 5.4%. The last year from 2013 to 2014 there was an increase in the imports of cucumbers and gherkins (41%), tomatoes (10.4%) and cabbages and cauliflowers (10.3%). Comparing 2014 to the past five years there is a decline in the imports of lettuce & chicory (45%), carrots and roots (42%), and onions, shallots and garlic (15%). There is a slight increase in the imports of cucumbers & gherkins by 14%.

### Exports

a) Exports of fruit destined for third countries increased from 2013 to 2014 to 4.2 mln T. (10%) and has increased compared to the average of 2009-2013 by 22%. The main fruit exported is apples, with 2.2 mln T in 2014, which is an increase of 340.000 T, which represents an increase of 31% compared to the average 2009-2013. All the other categories are also growing, except for table grapes and bananas. EU exports are continuously growing, ever since the enlargement of 2004. The year 2014 is again showing this clear growing line.



Trends in EU Vegetable Exports

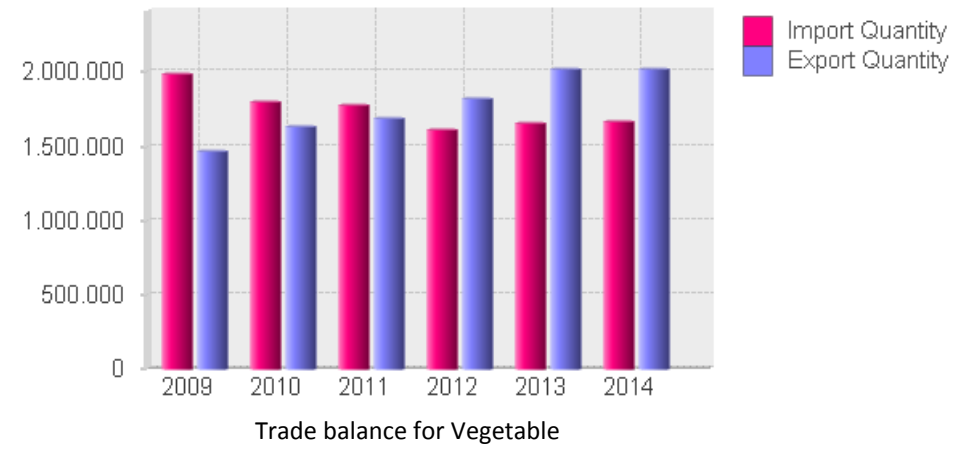
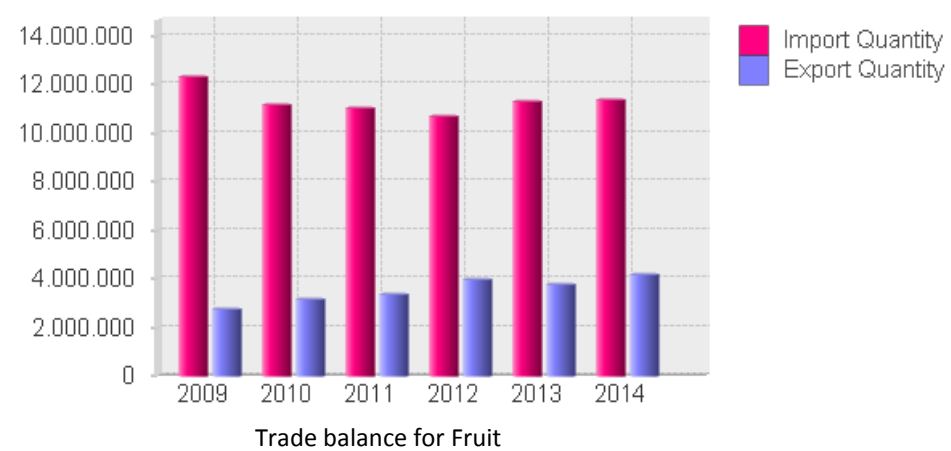
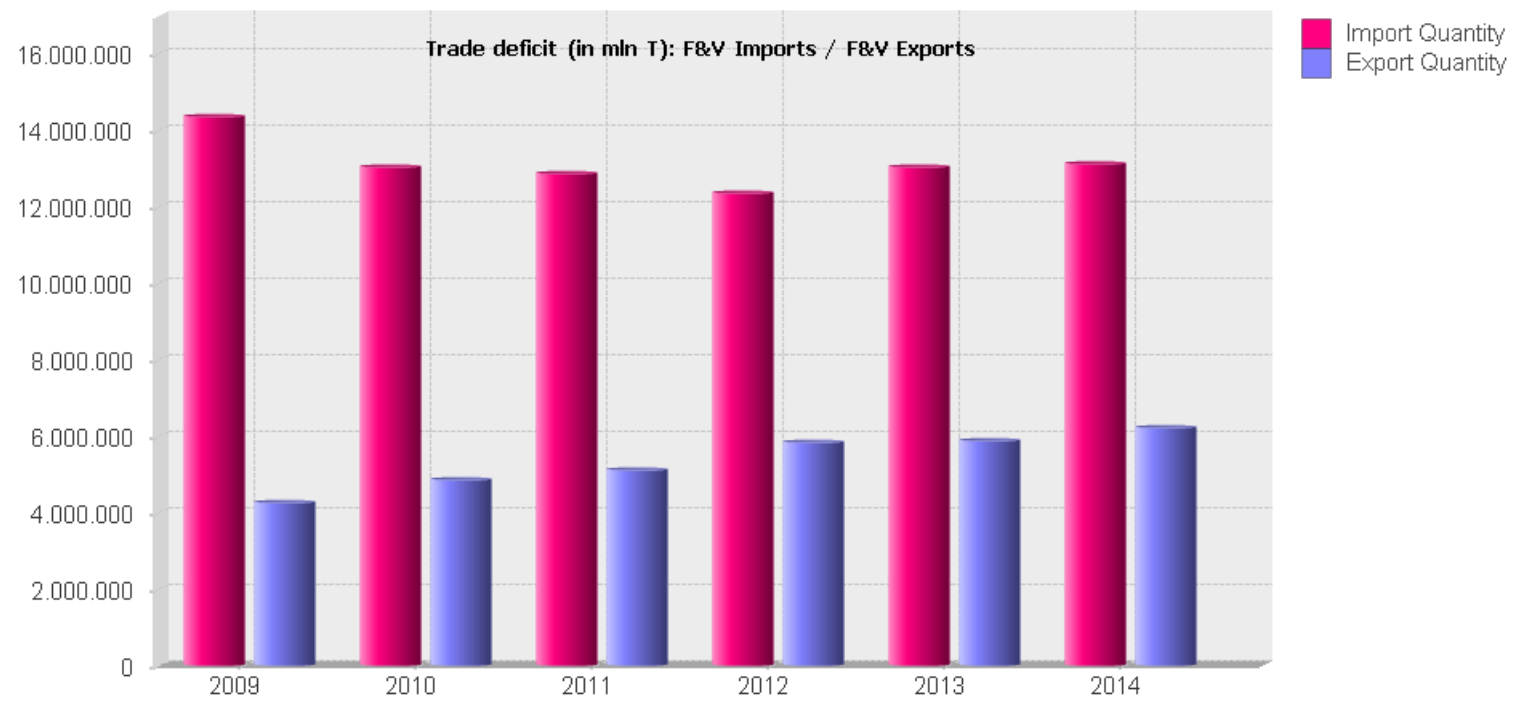
b) In the export in vegetables to third countries there is a little decrease between 2013 and 2014 (-0.45%). However, compared with the average of 2009-2013 there is an increase of the total export of vegetables of 16.8%. In total the EU now exports 2 mln T. of vegetables to third countries. The main commodity exported is onions with 850.000 T in 2014, rising 13% compared to the average of 2009-2013. Tomatoes decreased in 2014 compared to 2013 by 17%, currently at 300.000 T in 2014. Over the last five years, again a clear upward trend is noticeable regarding the exports of vegetables from the EU to third countries.



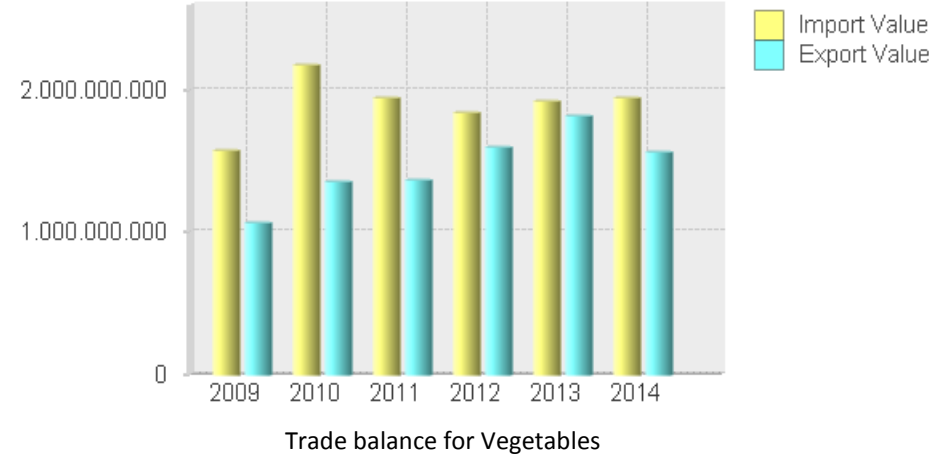
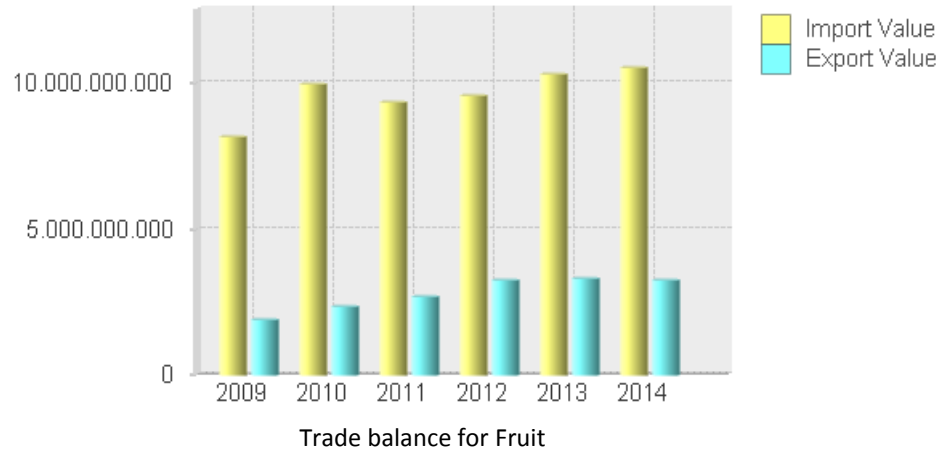
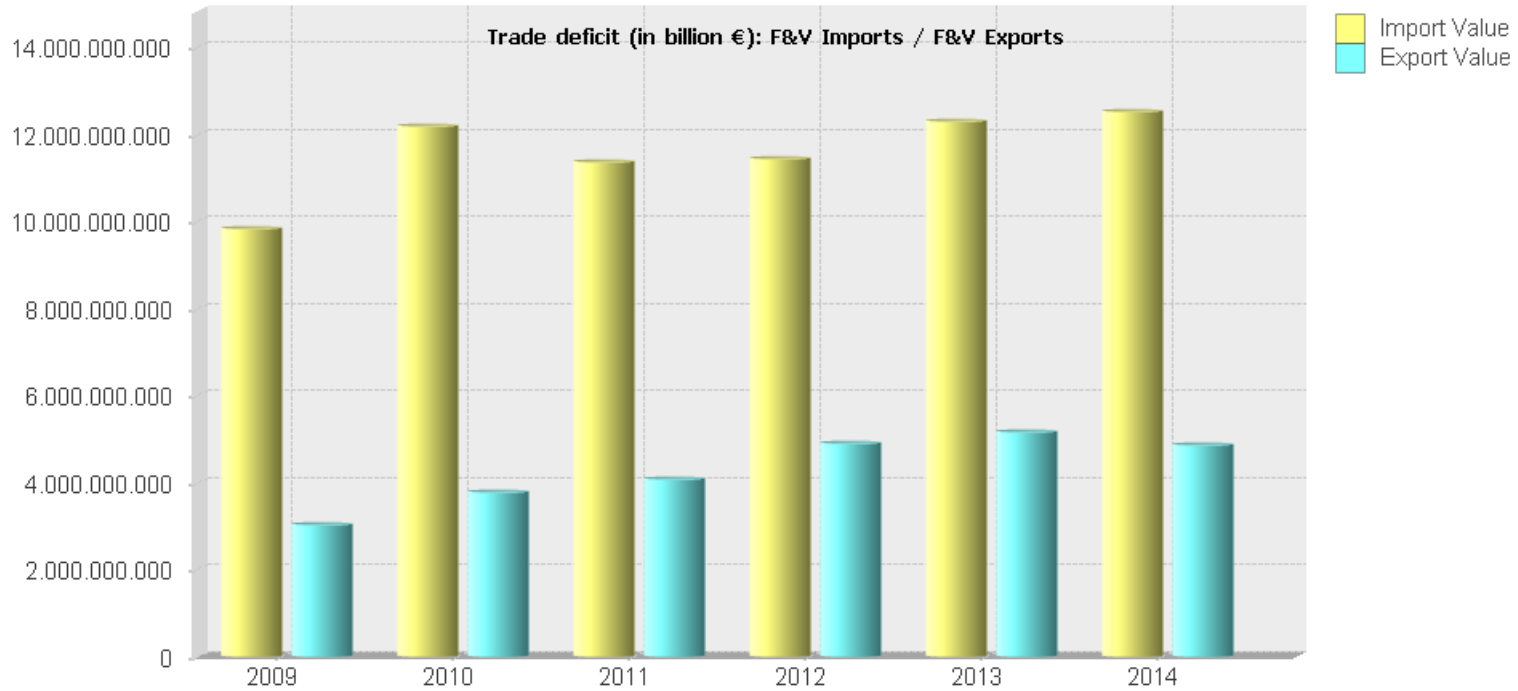
**EU Trade Balance Imports/Exports of Fruits & Vegetables to/from third countries**



C O N T R I B U T I O N M O N I T O R



**EU Trade Balance and Comparison Imports/Exports of Fruits & Vegetables**

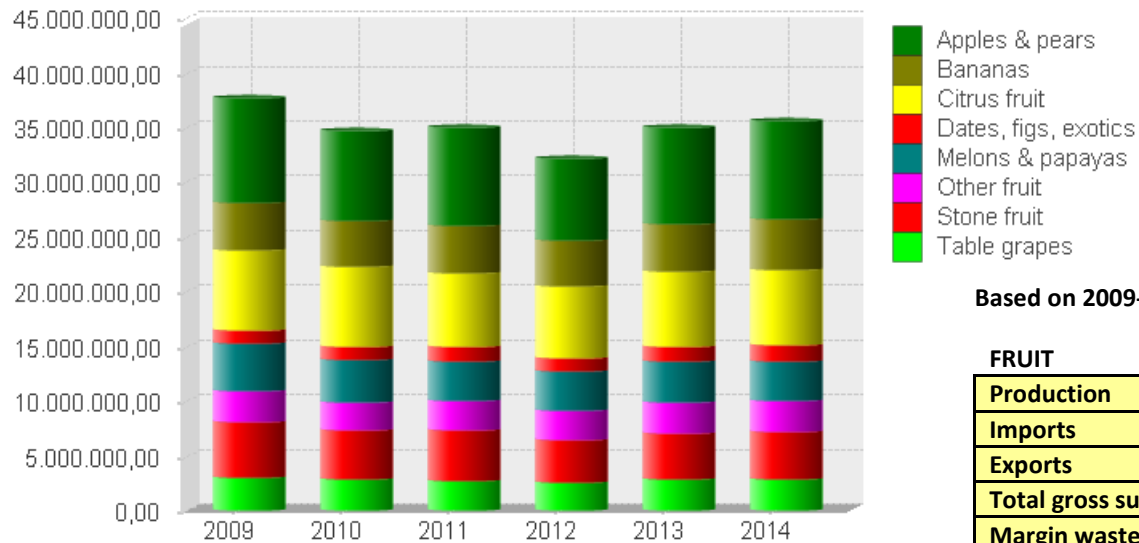


C O N S U M P T I O N M O N I T O R



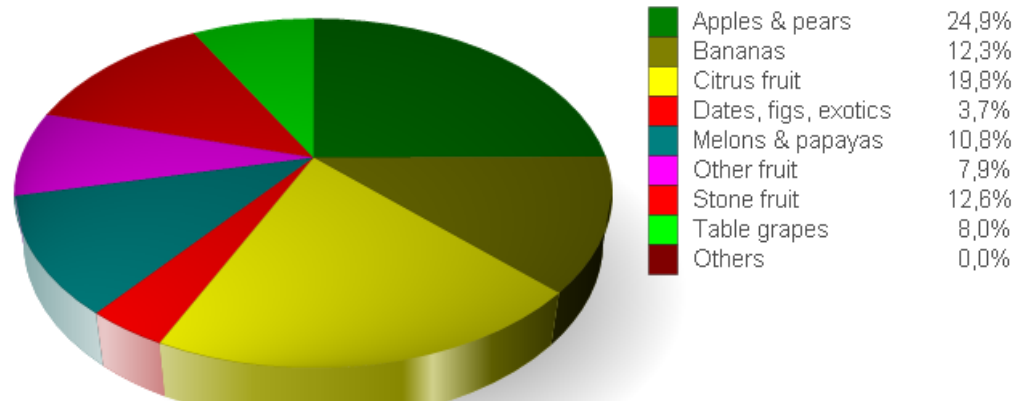
### 3.1.3. TOTAL GROSS SUPPLY & CONSUMPTION

Putting the production and trade statistics together gives us an indication of the trends for the EU-28 gross supply (net domestic production and imported minus exported fruits and vegetables).

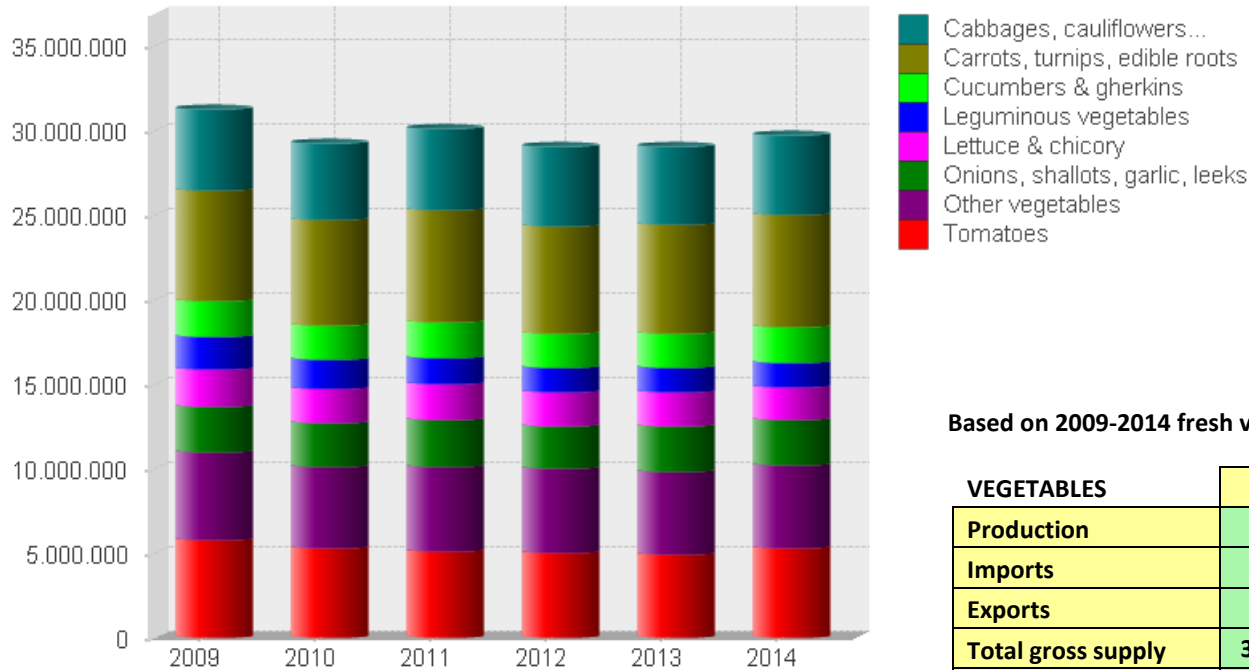


Based on 2009-2014 fresh fruit trends in EU-28:

FRUIT	2013	2014	% 14 /13	% 14/09-13
<b>Production</b>	<b>37 mT</b>	<b>37.97 mT</b>	<b>2.6 %</b>	<b>4.5 %</b>
<b>Imports</b>	<b>11.38 mT</b>	<b>11.43 mT</b>	<b>0.46 %</b>	<b>0.73 %</b>
<b>Exports</b>	<b>3.8 mT</b>	<b>4.2 mT</b>	<b>10 %</b>	<b>22 %</b>
<b>Total gross supply</b>	<b>43.8 mT</b>	<b>44.6 mT</b>	<b>1.73 %</b>	<b>3.96 %</b>
<b>Margin waste 20%</b>	<b>8.76 mT</b>	<b>8.9 mT</b>		
<b>Total net supply</b>	<b>35 mT</b>	<b>35.67 mT</b>	<b>1.73 %</b>	<b>3.96 %</b>

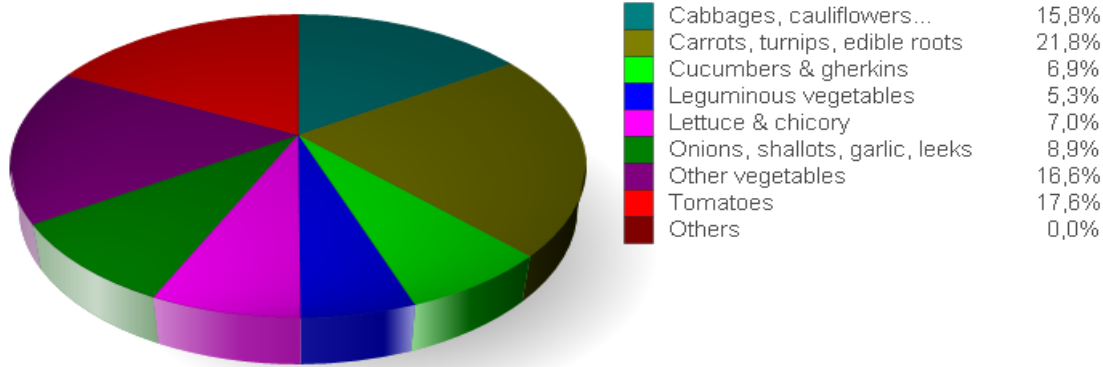


2013 EU Fruit Supply by product



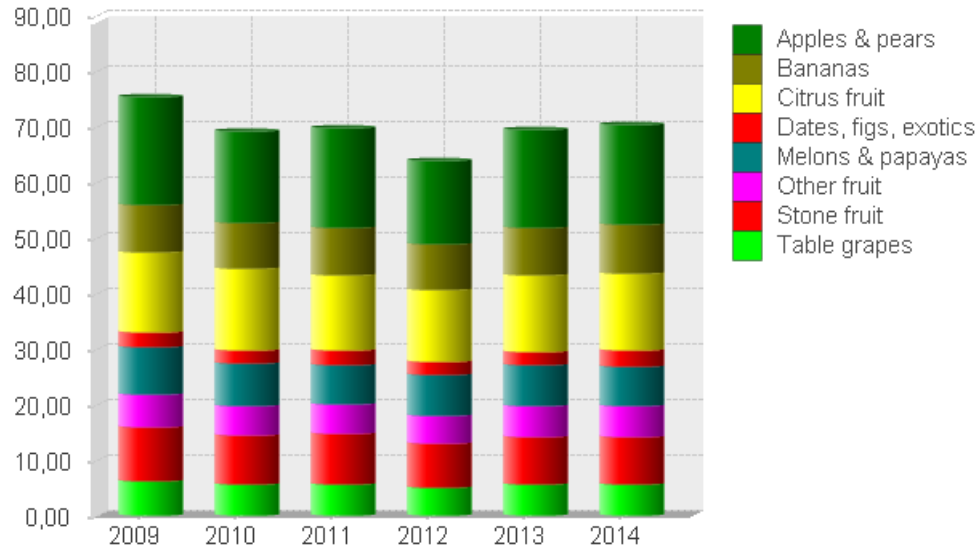
Based on 2009-2014 fresh vegetables trends in EU-28:

VEGETABLES	2013	2014	% 14 /13	% 14/09-13
<b>Production</b>	35.9 mT	37.5 mT	4.1 %	2.4 %
<b>Imports</b>	1.66 mT	1.67 mT	0.6 %	-5.4 %
<b>Exports</b>	2.03 mT	2.02 mT	- 0.45 %	16.8 %
<b>Total gross supply</b>	35.18 mT	37.15 mT	5.58 %	3.48 %
<b>Margin waste 20%</b>	7.04 mT	7.43 mT		
<b>Total net supply</b>	28.15 mT	29.7 mT	5.58 %	3.48 %



2014 EU Vegetables Supply by product

### EU-28 Gross per capita fruit consumption (in kg)/year



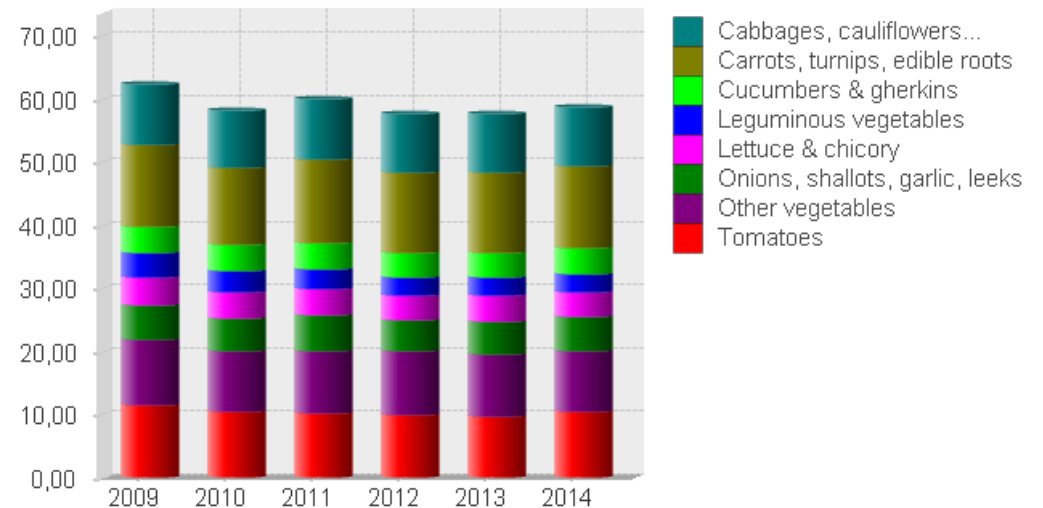
Based on a net supply of 35.67 mln T, the per capita fruit supply stands at 87.72 kg in 2014, compared to the average total gross supply per capita of 86.72 kg for the previous five years (2009-2013). The total gross supply of fruit in the EU-28 increased in 2014 by almost 4% compared to the average of the previous five years, while the gross per capita consumption also increased slightly with 1.16%. This is partly influenced by the evolution of population in the EU-28, which grew to 506.9 mln in 2014.

	<b>%14/13</b>	<b>%14/09-13</b>
<b>FRUIT gross supply</b>	<b>1.73 %</b>	<b>3.96 %</b>
	<b>%14/13</b>	<b>%14/09-13</b>
<b>FRUIT kg/per capita</b>	<b>1.21 %</b>	<b>1.16 %</b>

Average gross consumption per capita, based on EUROSTAT's figures as regards the population in the EU-28.

Based on a net supply of 29.7 mln T, the per capita vegetable supply stands at 73.37 kg in 2014, compared to the average total gross supply per capita of 73.92 kg for the previous five years (2009-2013). The total gross supply of vegetables in the EU-28 increased in 2014 by 3.48 % compared to the average of the previous five years, while the gross per capita consumption decreased slightly with 0.75%. This again is partly influenced by the evolution of population in the EU, which grew to 506.9 mln in 2014.

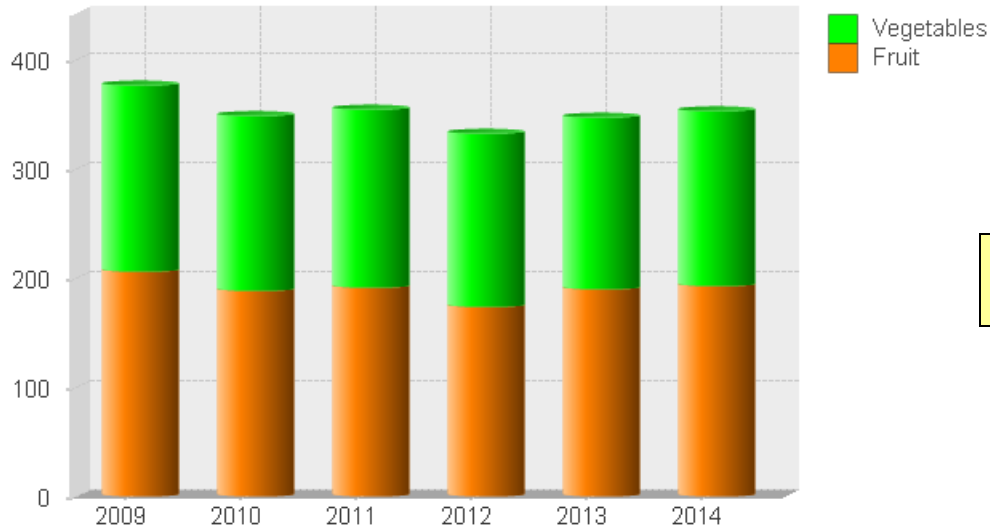
### EU-28 Gross per capita veg consumption (in kg)/year



Average gross consumption per capita, based on EUROSTAT's figures as regards the population in the EU-28.

	<b>%14/13</b>	<b>%14/09-13</b>
<b>VEG gross supply</b>	<b>5.58 %</b>	<b>3.48 %</b>
	<b>%14/13</b>	<b>%14/09-13</b>
<b>VEG kg/per capita</b>	<b>2 %</b>	<b>-0.75 %</b>

### EU-28 net fruit and vegetables consumption - gram/capita/day



	%14/13	%14/09-13
<b>Total FRUIT &amp; VEG net kg/per capita</b>	<b>1.6 %</b>	<b>0.3 %</b>

Net per capita fruit and vegetable consumption in the EU-28 has increased in 2014. Citizens in the EU-28 consume an average of 353.07 gram/ capita/ day in 2014. The consumption average increased by 1.6% in 2014 compared to 2013 and also increased slightly with 0.3% compared with the average of the last five years (2009-2013).

Fruit consumption rose by 1.21% compared to 2013 and also rose by 1.16% compared to the average of the last five years (2009-2013). Fruit now makes up an average of 54% of the total fruit and vegetable consumption, on average a 192.27 gram/ capita/ day in 2014.

Vegetable consumption also rose in 2014, by 2.0% compared to 2013. Compared to the average of the last five years (2009-2013) the consumption of vegetables decreased by 0.75%. Vegetables now make up 46% of the total fruit and vegetable consumption, an average 160.80 gram/ capita/ day in 2014.



**COMPARATIVE REVIEW OF CONSUMPTION TRENDS ACROSS EU-28  
&  
*COUNTRY BY COUNTRY SUPPLY***



### 3.2. COMPARATIVE REVIEW OF CONSUMPTION TRENDS ACROSS THE EU-28

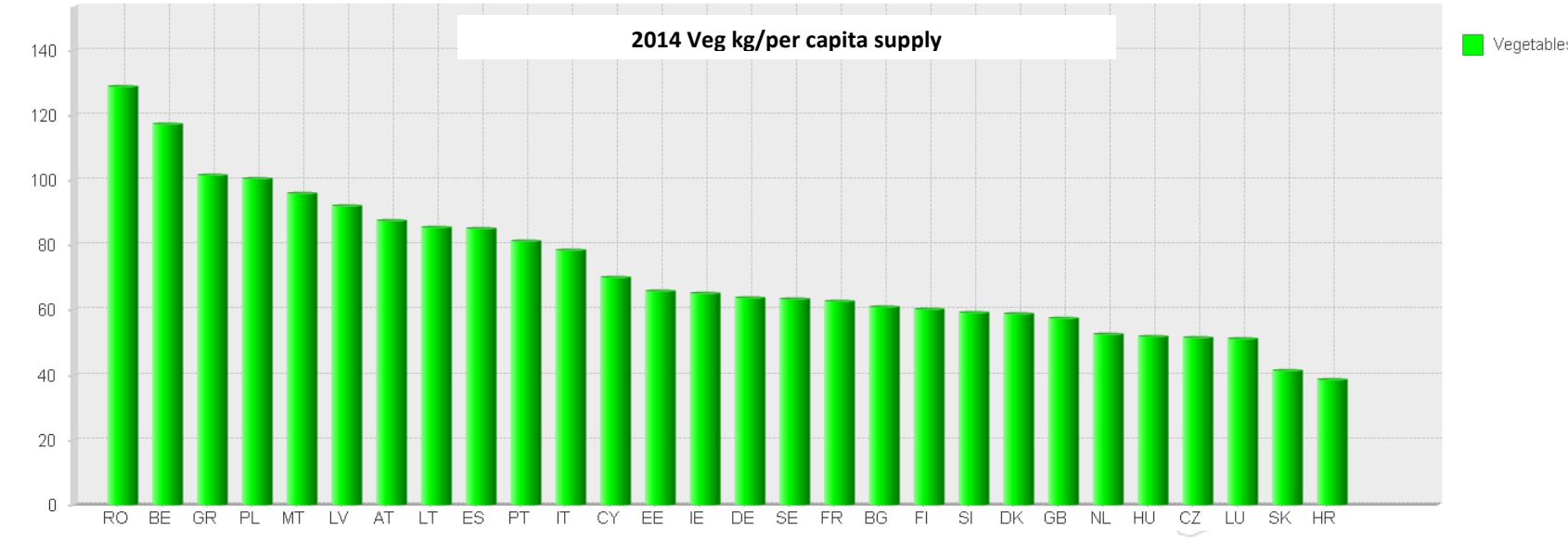
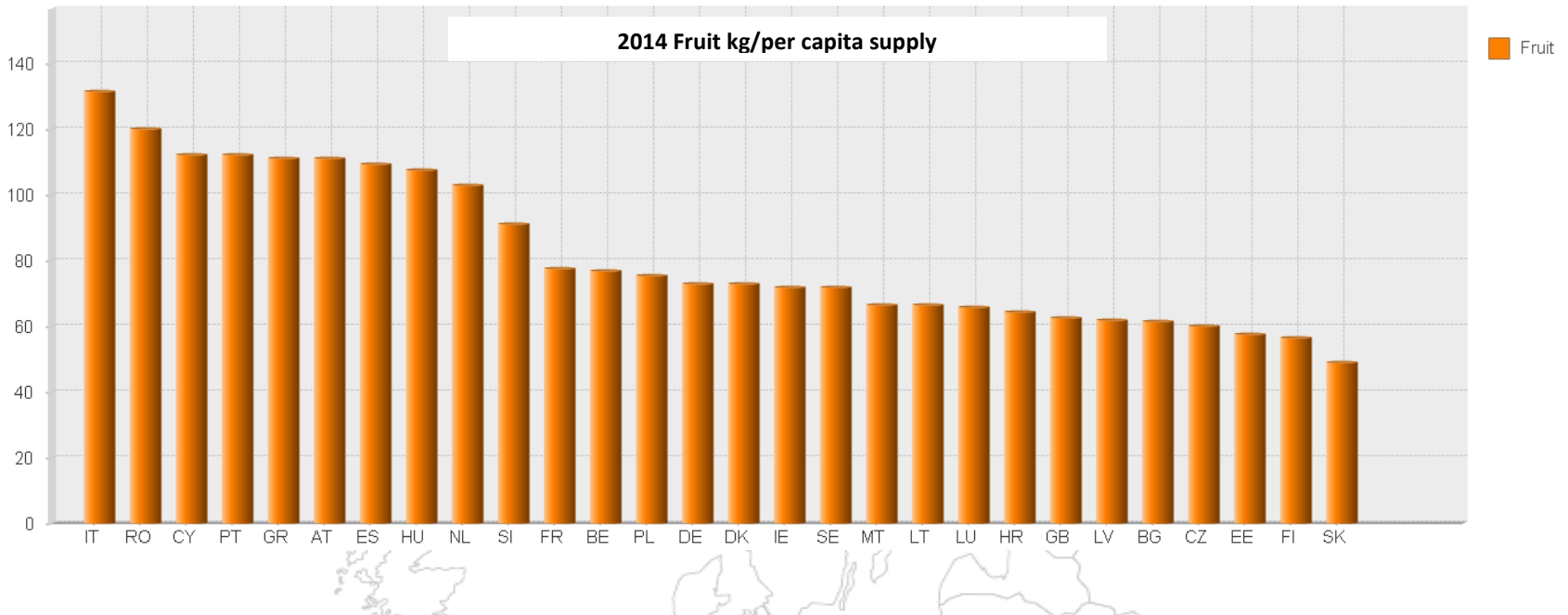
Member State	Total 2014	Fruit	Vegetables
<b>Total</b>	<b>353,07</b>	<b>192,27</b>	<b>160,8</b>
AT	435,22	243,94	191,26
BE	424,93	168,33	256,59
BG	267,96	134,58	133,38
HR	225,38	141,3	84,08
CY	399,59	246,02	153,57
CZ	244,55	132	112,55
DK	288,11	159,5	128,61
EE	270,38	126,29	144,1
FI	255,92	123,91	132,01
FR	307,14	169,74	137,4
DE	299,68	160,01	139,67
GR	466,75	244,13	222,62
HU	349,52	236,11	113,41
IE	300,36	157,86	142,5
IT	460,64	288,68	171,96
LV	337,11	135,27	201,84
LT	332,74	145,71	187,03
LU	256,26	144,07	112,19
MT	356,31	146,09	210,22
NL	340,04	225,39	114,65
PL	385,2	165,37	219,83
PT	423,54	245,83	177,71
RO	545,86	263,49	282,37
SK	197,29	107,2	90,09
SL	329,05	199,75	129,3
ES	426,37	239,82	186,56
SE	295,93	157,24	138,69
UK	262,82	136,92	125,9

The tables on this page show the availability per Member State of fruit and vegetables in grams per capita per day in 2014 (in red those below or just on or above the recommended 400g per day), and the evolution of population in the EU-28 Member States during the period 2009-2013. On the next page, the graphs illustrate the ranking by Member States on kg per capita supply in 2014, and on the next pages show the variation in consumption levels in each individual Member State, between the most recent consumption data available (2014) and the average of the previous five years (2009-2013). These graphs aim to compare consumption trends in relative terms and cannot be read as a comparison of absolute consumption levels. The graphs demonstrate that continued efforts are needed to increase consumption levels for fresh fruit and vegetables across Europe.

#### Population

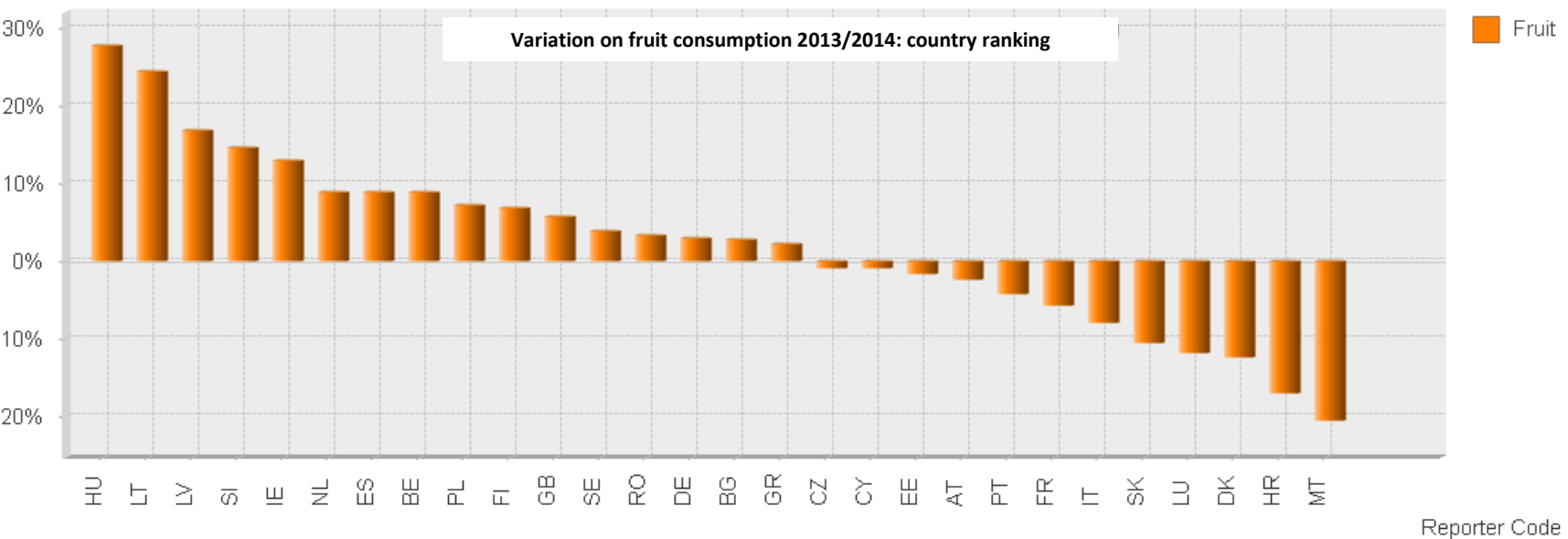
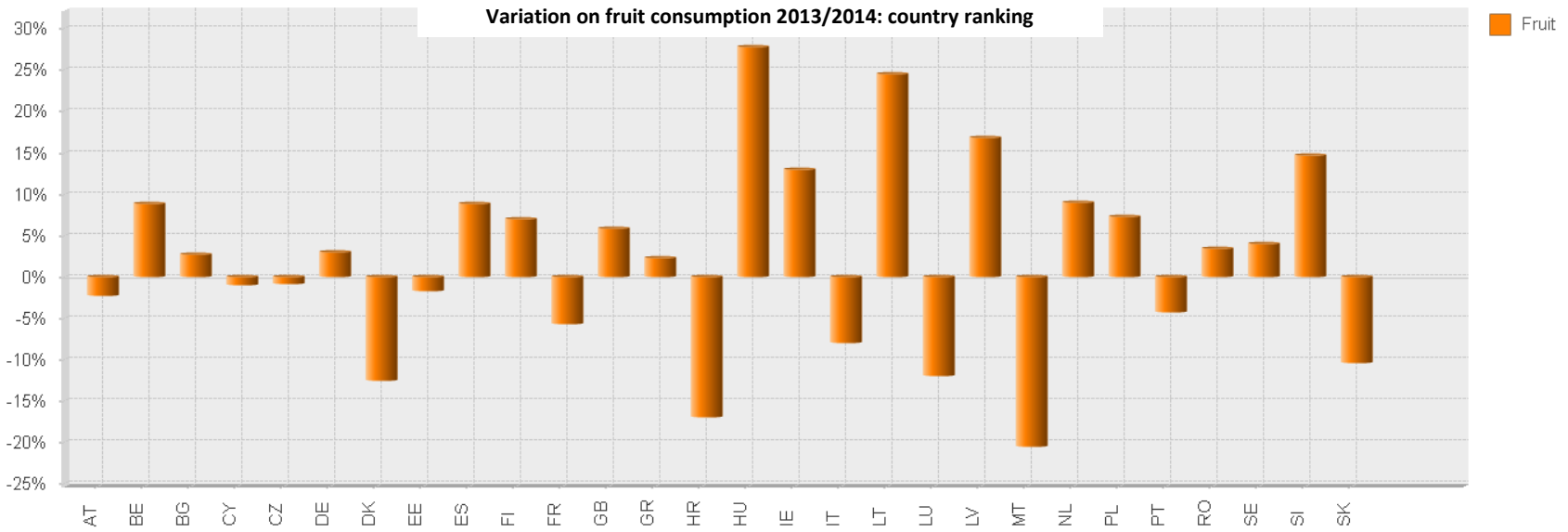
Countries	2009	2010	2011	2012	2013	2014
<b>Total</b>	<b>502.090.235</b>	<b>503.170.618</b>	<b>502.964.837</b>	<b>504.060.345</b>	<b>505.166.839</b>	<b>506.944.075</b>
Austria	8.335.003	8.351.643	8.375.164	8.408.121	8.451.860	8.506.889
Belgium	10.753.080	10.839.905	11.000.638	11.094.850	11.161.642	11.203.992
Bulgaria	7.467.119	7.421.766	7.369.431	7.327.224	7.284.552	7.245.677
Croatia	4.309.796	4.302.847	4.289.857	4.275.984	4.262.140	4.246.809
Cyprus	796.930	819.140	839.751	862.011	865.878	858.000
Czech Republic	10.425.783	10.462.088	10.486.731	10.505.445	10.516.125	10.512.419
Denmark	5.511.451	5.534.738	5.560.628	5.580.516	5.602.628	5.627.235
Estonia	1.335.740	1.333.290	1.329.660	1.325.217	1.320.174	1.315.819
Finland	5.326.314	5.351.427	5.375.276	5.401.267	5.426.674	5.451.270
France	64.350.226	64.658.856	64.978.721	65.276.983	65.600.350	65.889.148
Germany	82.002.356	81.802.257	80.222.065	80.327.900	80.523.746	80.767.463
Greece	11.094.745	11.119.289	11.123.392	11.086.406	11.003.615	10.926.807
Hungary	10.030.975	10.014.324	9.985.722	9.931.925	9.908.798	9.877.365
Ireland	4.521.322	4.549.428	4.570.881	4.582.707	4.591.087	4.605.501
Italy	59.000.586	59.190.143	59.364.690	59.394.207	59.685.227	60.782.668
Latvia	2.162.834	2.120.504	2.074.605	2.044.813	2.023.825	2.001.468
Lithuania	3.183.856	3.141.976	3.052.588	3.003.641	2.971.905	2.943.472
Luxembourg	493.500	502.066	511.840	524.853	537.039	549.680
Malta	410.926	414.027	414.989	417.546	421.364	425.384
Netherlands	16.485.787	16.574.989	16.655.799	16.730.348	16.779.575	16.829.289
Poland	38.135.876	38.022.869	38.062.718	38.063.792	38.062.535	38.017.856
Portugal	10.563.014	10.573.479	10.572.721	10.542.398	10.487.289	10.427.301
Romania	20.440.290	20.294.683	20.199.059	20.095.996	20.020.074	19.947.311
Slovakia	5.382.401	5.390.410	5.392.446	5.404.322	5.410.836	5.415.949
Slovenia	2.032.362	2.046.976	2.050.189	2.055.496	2.058.821	2.061.085
Spain	46.239.273	46.486.619	46.667.174	46.818.219	46.727.890	46.512.199
Sweden	9.256.347	9.340.682	9.415.570	9.482.855	9.555.893	9.644.864
United Kingdom	62.042.343	62.510.197	63.022.532	63.495.303	63.905.297	64.351.155



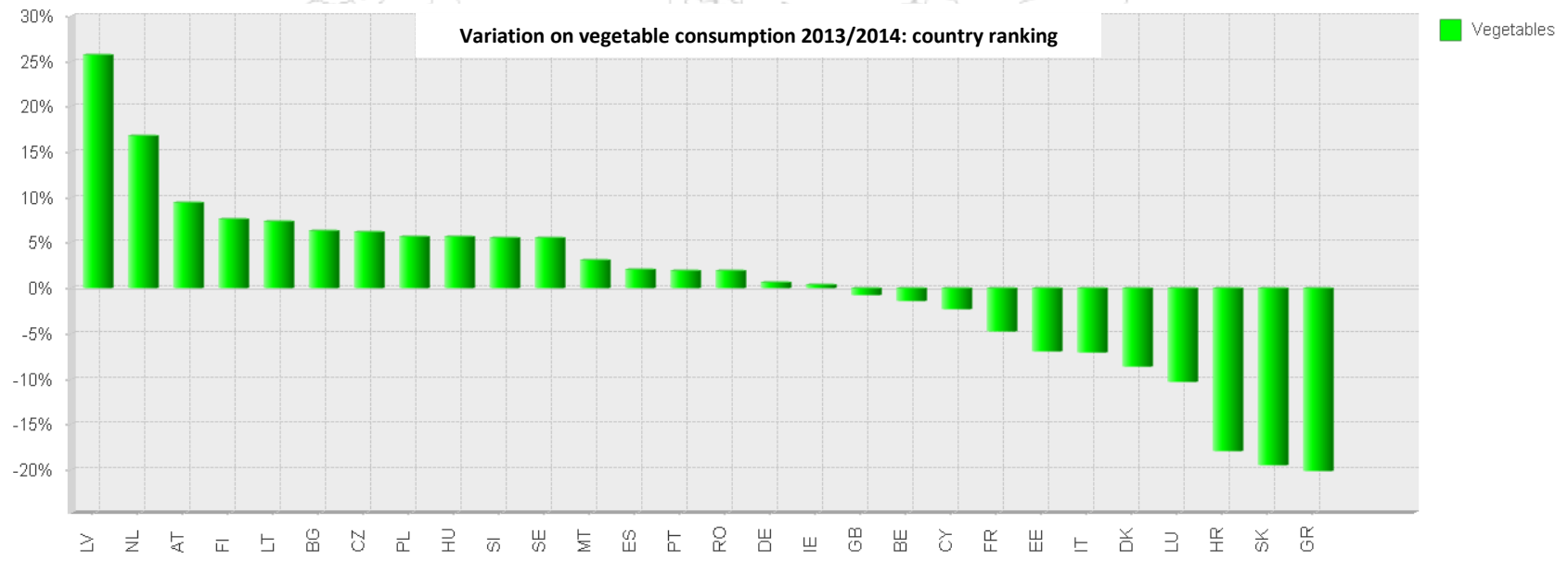
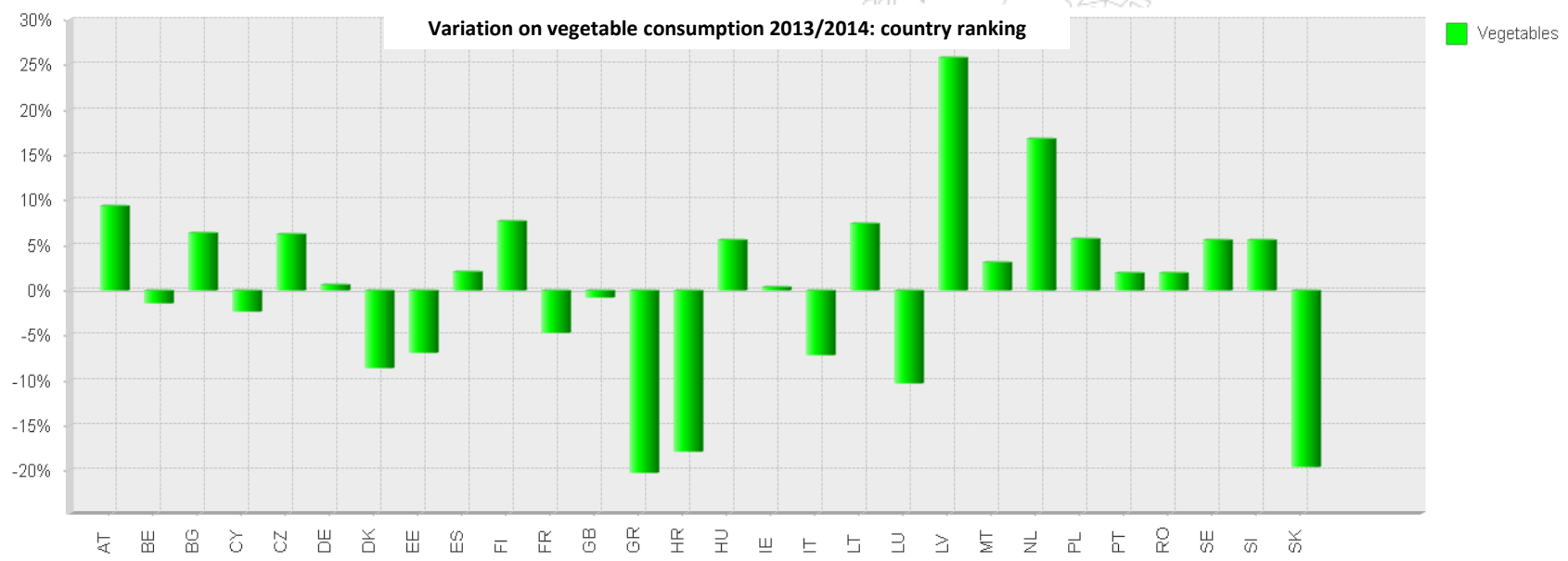


**FRUIT CONSUMPTION**

MONITOR CONSUMPTION



**VEGETABLE CONSUMPTION**



### 3.3. COUNTRY BY COUNTRY FRUIT & VEGETABLE SUPPLY

The graphs in this section illustrate the size of the market by ranking Member States according to total level of supply in tonnes for fruit & vegetables. The last graph illustrates total supply of fruit and vegetables in grams per day per capita, and compares this data with the FAO/WHO minimum recommendation of 400 grams per day/per person.

