CBI Trade Statistics:

Fresh Fruit and Vegetables in Europe
Introduction

Fresh fruit and vegetables are one of the most important categories in European supermarkets. Over the last five years, European production and consumption of fresh fruit and vegetables have been stable. Major future developments in total market volumes are not anticipated. The Netherlands, the United Kingdom and Belgium are the leading direct importers of fresh fruit and vegetables from developing countries. The Netherlands and Belgium are major trade hubs for fresh produce from developing countries destined for other European markets. European countries import a wide range of fresh products from developing countries: besides a large quantity of bananas, they also import out-of-season products (e.g. green beans).

Import

The total import volume of fresh fruit and fresh vegetables\(^1\) from outside the European Union (EU) remains stable at 11 million tons (almost €10 billion) and 2.1 million tons (€2.2 billion), respectively. A slight increase in volume is visible for 2013 and 2014. The import of fresh fruit is largely complemented by developing countries,\(^2\) while most vegetables are supplied by producers in the EU or in neighbouring countries.

---

\(^1\) Fresh fruit and vegetables are defined according to the CBI Product Tree based on the Eurostat HS product classification. EU Statistics are based on the EU member states. In the past five years, only Croatia has joined the EU (2013).

\(^2\) Developing countries in the trade statistics are defined as the countries mentioned on the OECD DAC list 2014.
Figure 3: Leading development countries in the supply of fresh fruit to the EU in 2014 in million tonnes and their import share in percentage

Source: Eurostat / Comext
Figure created by ICI Business

Figure 4: Total European import of fresh vegetables, 2010-2014, in million tonnes

Source: Eurostat / Comext
Figure created by ICI Business
**Interpretations and opportunities**

**Slight increase of EU imports:** The European import of fresh fruit and vegetables showed an annual growth up to 2008, and was more or less stable until 2012 due to the European economic downturn. The import volumes of 2013 and 2014 show signs of a recovery. The EU is more dependent on external supply for fresh fruit than it is for fresh vegetables. Fruit producers from developing countries therefore have better chances of successful market entry than do suppliers of vegetables.

Import growth is most clearly seen in the increasing popularity of tropical products (e.g. avocados and mangos), as well as for niche products (e.g. berries and exotic fruit and vegetables). Imports have remained stable for some of the largest commodities (e.g. tomatoes and oranges).

**Exotics and out-of-season products dominate fruit imports:** Bananas represent about 45% of the imported fruit from outside of the EU, followed by pineapples (8%), oranges (7%) and grapes (5%). Over the past five years, more fruit has been imported from Costa Rica, Ecuador and Peru. The increasing supply from Costa Rica and Ecuador is strongly related to the banana trade, while Peru is improving its position in emerging fruits (e.g. avocados and mangos). South Africa is
taking advantage of its opposite seasons in citrus fruit, fresh grapes, apples and pears. New suppliers and suppliers of non-traditional fruits can best achieve success in specific niches for exotic and out-of-season fruit.

**Import source of vegetables near destination market:** For vegetables, the main imported products from outside the EU are tomatoes (23%), potatoes (13%), onions (13%), sweet peppers (capsicum) (9%) and beans (9%). Europe provides a significant share of its own fresh vegetables, some of which are grown year round in greenhouses. Morocco, Egypt and Turkey are best positioned to supplement the supply of fresh vegetables. For example, Morocco has benefitted from significant growth in the trade of tomatoes.

**The Netherlands as the main point of entry:** The Netherlands is the biggest importer from outside the EU with almost 2.6 million tons of fruit and 367 thousand tons of vegetables. Belgium and the UK are also major importers of fresh fruit from developing countries. Ports in the Netherlands and Belgium have many years of experience with fresh produce, holding a strong position as entry points into mainland Europe. Bananas account for about half of Belgium’s fresh-fruit imports. In early 2015, the multinational banana brand Chiquita changed its European entry point to the port of Vlissingen in the Netherlands.

**Tips:**
- Secure your supply by establishing long-term business relationships or entering supply programmes. Consult with your EU buyers to determine for which products they expect demand to increase.
- Focus on specific niches and innovations. Stay abreast of developments and prices in your segment through informative websites, including Fresh Fruit Portal, Freshplaza and Fruitrop.
- Choose an importer based on your strategy and strengths: brand or private label, open or exclusive relationship, wholesale or retail, supply programme or spot.

**Exports**

In 2014, European countries exported €18.7 billion worth of fresh fruit and €14.9 billion worth of fresh vegetables (including intra-EU trade). Over 80% of EU exports go to other European countries. Spain is the largest exporter, with exports consisting predominantly of its own production, while the Netherlands and Belgium are major trade hubs due to their logistical positioning.

**Figure 7: Total European export of fresh fruits in million tonnes**

![Graph showing total European export of fresh fruits in million tonnes from 2010 to 2014. Developing countries, EU, and Rest of the world are differentiated by color.](source: Eurostat / Comext, Figure created by ICI Business)
Figure 8: European exporters of fresh fruits in million tonnes

Source: Eurostat / Comext
Figure created by ICI Business

Figure 9: Destination markets and trade hubs

Figure created by ICI Business
Figure 10: Total European export of fresh vegetables in million tonnes

Source: Eurostat / Comext
Figure created by ICI Business

Figure 11: European exporters of fresh vegetables in million tonnes

Source: Eurostat / Comext
Figure created by ICI Business
**EU export over 80% destined for local market:** When European countries export fresh fruit, over 80% of the destinations are in the EU itself. For fresh vegetables, this is 86%. The European Union constitutes one of the largest markets for fresh fruit and vegetables, and suppliers can expect their products to be moved extensively across the continent.

**Spain is the biggest fresh fruit exporter:** Europe’s biggest exporter of fresh fruit is Spain. With an export volume of almost 7.2 million tons Spain accounts for 34% of Europe’s fresh fruit exports. Spain produces a lot of fruit. The same goes for Italy. The Netherlands and Belgium combine domestic production with distribution (re-exports) of imported fresh fruits to the rest of Europe. In-season competition for grapes, oranges (and apples) is fierce, especially for products from Southern Europe.

**The Netherlands is the biggest re-exporter of fresh fruit:** Recent research by Dutch agricultural bank Rabobank revealed that 45% of Dutch fresh fruit exports are re-exported imports. Re-exported varieties are mainly exotic fruit. Fruit produced in the Netherlands mainly consists of apples and pears. The Netherlands is an important trade hub for producers of exotic fruit.

**The Netherlands is the biggest exporter of fresh vegetables:** the Netherlands is the biggest (re)exporter of fresh vegetables. The Netherlands combines major domestic horticulture production with a trade hub function to the rest of Europe, and, as a result, has (re)exported 6.1 million tons of produce, which accounts for over 28% of total European exports.

**Major destinations include Germany, the UK, Belgium and France:** in intra-EU trade, Germany, the UK and France are the largest final destinations. In 2014, European countries exported €7.9 billion in fresh fruits and €7.1 billion in fresh vegetables to Germany, the UK and France. Around 44% of the European export volume of fresh fruit and vegetables has one of these three countries as its final destination. Another 17% of EU exports is consumed or redistributed by Belgium or the Netherlands.

**Russia as an important destination outside the EU:** outside the EU, fresh fruit and vegetables are mainly exported to Russia, Belarus, Ukraine, Switzerland and Norway. As a result of international politics Russia has banned European fruits and vegetables. The length of this ban is currently unknown. This has led to price drops for fresh fruit and vegetables produced in Europe and this can, in turn, create additional competition for (higher priced) imports.

**Potential growth in Eastern Europe:** particularly well-known fruits such as pineapples and lemons and limes are finding their way through Western European ports to new, upcoming markets in Eastern Europe.

---

3 Rabobank Cijfers & Trends, Branche informatie – Groothandel in groente en fruit, Rabobank, 2014.
**Investments in infrastructure:** new investments are being made in ports and container services as well as reefer services in places such as Rotterdam in the Netherlands. Inter-modal transport services and connections are being extended and developed. This will further strengthen the position of the Netherlands and Belgium as trade hubs.

**Tips:**
- Germany, the UK and France are the main destinations. If you focus on these markets, it is useful to visit the Fruit Logistica trade fair in Berlin, Germany, to find an importer in those three major destination markets.
- If you wish to export to Europe as a whole or to growth markets in Eastern Europe, find importing partners in trade hub countries such as the Netherlands and Belgium.

**Production**

The EU produced 66.8 million tons of fresh fruit in 2013 and close to 114 million tons of fresh vegetables, almost half of which consisted of potatoes. The dominant producers were Italy, Spain and France. With the exception of 2012, the production of fruit has remained stable, while the production of vegetables has declined.

**Figure 13: European production of fresh fruit in million tonnes**

Source: FAOSTAT
*Figure created by ICI Business*
**Figure 14: Top 10 European producers of fresh fruit in million tonnes**

![Top 10 European producers of fresh fruit in million tonnes](image1)

*Source: FAOSTAT*

*Figure created by ICI Business*

**Figure 15: European production of fresh vegetables in million tonnes**

![European production of fresh vegetables in million tonnes](image2)

*Source: FAOSTAT*

*Figure created by ICI Business*
Figure 16: Top 10 European producers of fresh vegetables in million tonnes

<table>
<thead>
<tr>
<th>Country</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>16</td>
<td>14.5</td>
<td>13</td>
<td>12.5</td>
<td>12</td>
</tr>
<tr>
<td>Spain</td>
<td>12.5</td>
<td>12.5</td>
<td>12</td>
<td>11.5</td>
<td>11.5</td>
</tr>
<tr>
<td>Germany</td>
<td>11.5</td>
<td>11</td>
<td>10.5</td>
<td>10.5</td>
<td>10.5</td>
</tr>
<tr>
<td>France</td>
<td>11</td>
<td>11</td>
<td>10.5</td>
<td>10</td>
<td>10.5</td>
</tr>
<tr>
<td>Netherlands</td>
<td>10.5</td>
<td>10</td>
<td>12</td>
<td>12.5</td>
<td>13</td>
</tr>
<tr>
<td>Poland</td>
<td>9.5</td>
<td>9.5</td>
<td>9.5</td>
<td>9.5</td>
<td>9.5</td>
</tr>
<tr>
<td>UK</td>
<td>8</td>
<td>8</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
</tr>
<tr>
<td>Romania</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
</tr>
<tr>
<td>Belgium</td>
<td>6.5</td>
<td>6.5</td>
<td>6.5</td>
<td>6.5</td>
<td>6.5</td>
</tr>
<tr>
<td>Portugal</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: FAOSTAT
Figure created by ICI Business

Interpretations and opportunities

*Spain, Italy and France main producing countries:* Italy, Spain and France produce almost 68% of European fresh fruit (mainly grapes and citrus fruits), and 47% of fresh vegetables (excluding potatoes). The Netherlands is also a top EU producer of fresh vegetables, producing mainly tomatoes, cucumbers and sweet peppers from greenhouse horticulture.

*Obstacles in competing with large EU producers:* Large producer countries do not favour foreign suppliers. Similarly, suppliers to the EU regard Europe’s strict regulation as a form of protectionism. For example, South Africa raised the issue of EU regulations on Citrus Black Spot at the Sanitary and Phytosanitary Committee of the World Trade Organization (WTO).

*Weather conditions can change opportunities:* Fruit production in 2012 was considerably lower because of adverse weather conditions, but recovered again in 2013 to a normal volume of 66.8 million tons. A similar production volume is expected for 2014. Weather can exert a major influence on annual production. E.g. in Northern Europe, the cold winter at the start of 2012 resulted in a 25% decrease in the yield of pears. Although impossible to predict, weather and poor yields can provide short-term opportunities for fresh products produced in other regions.

*Declining production of fresh vegetables:* In the past decade, EU production of vegetables has exhibited a downward trend. The latest developments with the Russian embargo have placed even more pressure on pricing and production volumes in 2015. Suppliers from outside the EU must deal with these negative effects as well.

*New export markets for EU producers:* EU exporters to the Russian market are reassessing their strategies. For example, the Netherlands is engaged in government-level negotiations with China and Brazil for the approval of Dutch-grown sweet peppers, tomatoes, apples and pears. This emphasizes the saturation of the EU market for locally produced and in-season fresh products.

**Tips:**
- Follow European production schemes for out-of-season production or supply fruit and vegetables that are not produced in Europe. Discuss the market opportunities with your buyer.
- Import demand for fresh fruit in European markets can fluctuate due to occasional bad weather conditions. This can offer short-term opportunities in the European market. Be prepared to act quickly on sudden drops in fresh product availability.

---

4 [http://www.southafrica.info/news/1647102.htm#_VS0SLZPHHy8](http://www.southafrica.info/news/1647102.htm#_VS0SLZPHHy8)
Consumption

The total fruit consumption (including losses and processing) in 2014 is expected to be similar to the 74 million tons in 2013. The consumption of vegetables has been declining, but may rise to an estimated 119 million tons (or 62 million tons without potatoes) in 2014, due to the loss of exports to Russia, as well as to the efforts of EU member states to promote the consumption of local fresh products. Despite the recent economic crisis and the Russian embargo, EU retail sales are increasing.

Figure 17: European consumption of fresh fruit in million tonnes
Including losses and processing

![Graph showing European consumption of fresh fruit](source)

Source: FAOSTAT, Eurostat / Comext / Market Access Database
Figure and calculations by ICI Business

Figure 18: Top 10 EU consumers of fresh fruit in million tonnes
Including losses and processing

![Bar chart showing top 10 EU consumers of fresh fruit](source)

Source: FAOSTAT, Eurostat / Comext
Figures and calculations by ICI Business
Figure 19: European consumption of fresh vegetables in million tonnes
Including losses and processing

![Graph showing the European consumption of fresh vegetables from 2010 to 2014 est.]

**Sources:** FAOSTAT, Eurostat / Comext / Market Access Database
**Figure and calculations by ICI Business**

Figure 20: Top 10 EU consumers of fresh vegetables in million tonnes
Including losses and processing

![Bar chart showing the top 10 EU consumers of fresh vegetables from 2010 to 2014 est.]

**Source:** FAOSTAT, Eurostat / Comext
**Figure and calculations by ICI Business**
Interpretations and opportunities

**Italy and Spain are the largest consumers/processors:** According to the European Food Information Council (**EUFIC**), the highest consumption rates for fresh fruit and vegetables are in the east and south of Europe.⁵ Italy and Spain are the largest consumers, in addition to being major producers of grapes, oranges and tomatoes. A large share of their ‘consumption’ is thus linked to local processing activities. Consumption in Eastern Europe is relatively high, with potential for new products, which are increasingly competing with local produce.

**Initiatives to promote fresh products:** In several countries, the consumption of fresh fruit and vegetables is below the levels recommended by the WHO. In the interest of public health, many countries have adopted initiatives to promote the consumption of fresh fruit and vegetables.⁶

**Growth in EU retail sales:** Recent data from Eurostat reveal an increase in retail sales in the Eurozone and the entire EU since early 2013.⁷ It also reinforces the statement that market growth in the next few years will be achieved mainly by the new EU member countries in the Eastern part of Europe. Expectations are that a recovery from the economic downturn in Europe and increasing consumption power for Eastern European consumers will have a positive effect on European consumption and intra-EU trade.

**Modest opportunities in niches:** Consumption in the EU is relatively stable and consistent for leading product categories (e.g. grapes, apples, oranges, bananas, potatoes and tomatoes). Growth in consumption is most evident for non-traditional or niche products (e.g. sweet potatoes, avocados and limes). This growth nevertheless has little influence on the figures for the dominant products consumed.

**Attention to higher-value products:** Although the total consumption volume shows little divergence, and although the fresh sector is generally driven by price, total value has increased. These developments reflect consumer attention to

---

higher-value products. Especially in Northern Europe, consumers have become more conscious of sustainability (e.g. organic and fair trade products), as well as with regard to aspects relating to health and quality (e.g. ripeness and taste). Retailers are offering a wider range of products (e.g. by adding freshly cut and more exotic types of fruit and vegetables to their assortments). See also CBI Trends for fresh fruit and vegetables.

Tips:
- Transparency and promotion through storytelling: show end users where a product comes from and who the farmer is. Use an Internet site for your story and stickers on the fruit, bags or other material to lead end-users to your site.
- For well-developed markets, adopt a distinctive strategy involving high-quality and innovative products, in addition to ensuring the proper variety and timing. Make sure that your importer knows how to market your product, or develop a product together. This will guarantee you a better competitive position and a fair price.

Useful sources

Export and market entry support:
- CBI - http://www.cbi.eu/
- CBI market studies on Fresh Fruit and Vegetables - http://www.cbi.eu/marketintel_platform/fresh-fruit-vegetables/136122/buyerrequirements

Statistical information:
- ITC Trade Map - http://www.trademap.org/