



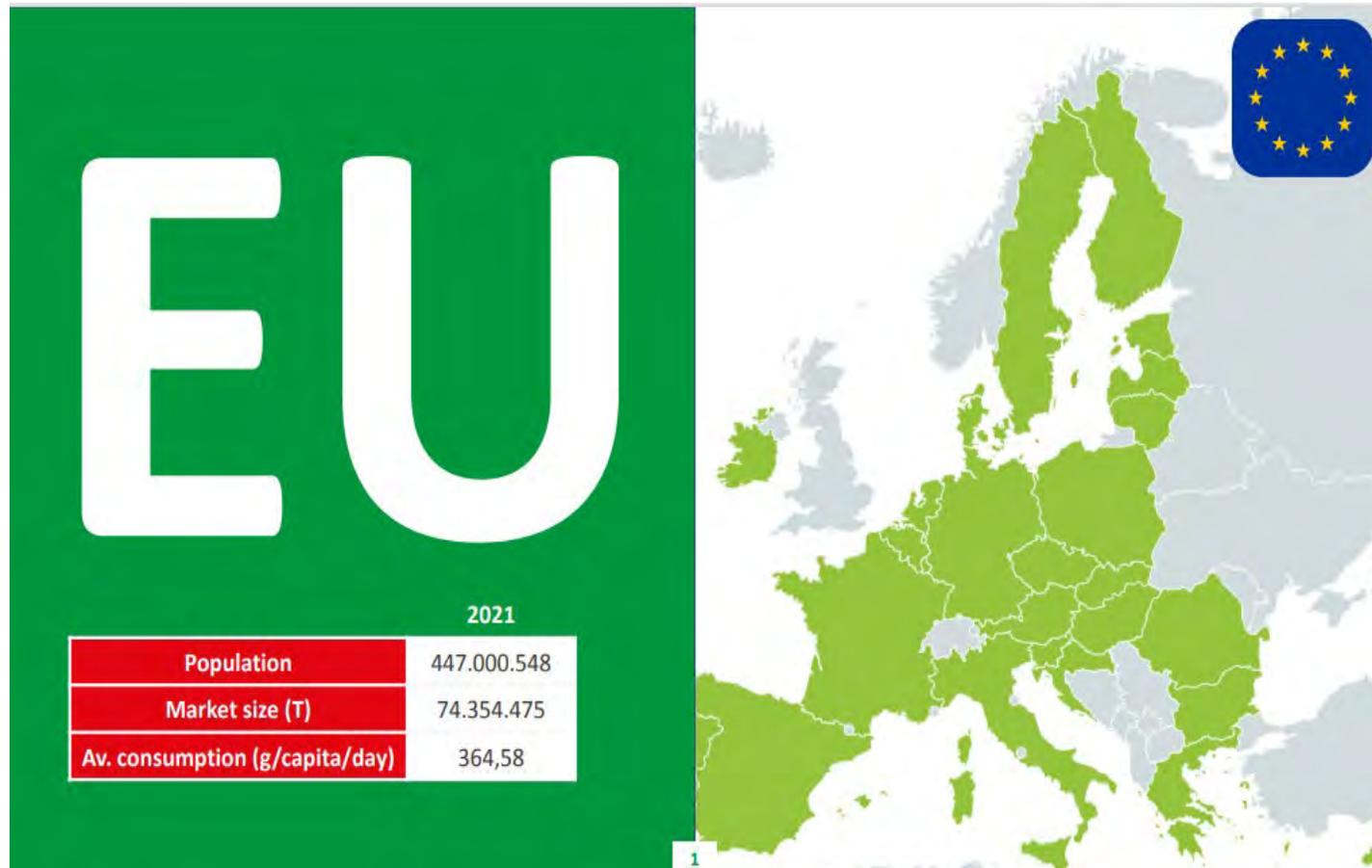
Fresh produce consumption trends

Philippe Binard
Freshfel Europe

Pipfruit Market Observatory
10 March 2023

FRESHFEL CONSUMPTION MONITOR 2023

- Released every year by Freshfel Europe
- New format for 2023
- Based on official statistics (Eurostat)
- Data gap are narrowed – covering now up 2021
- Same methodology used for EU aggregate and for each of the 27 Member States
- Not a market analysis but provide a trends
- Monitor accompanied by a webinar for market analysis and input from selected members on latest trends to look behind the data





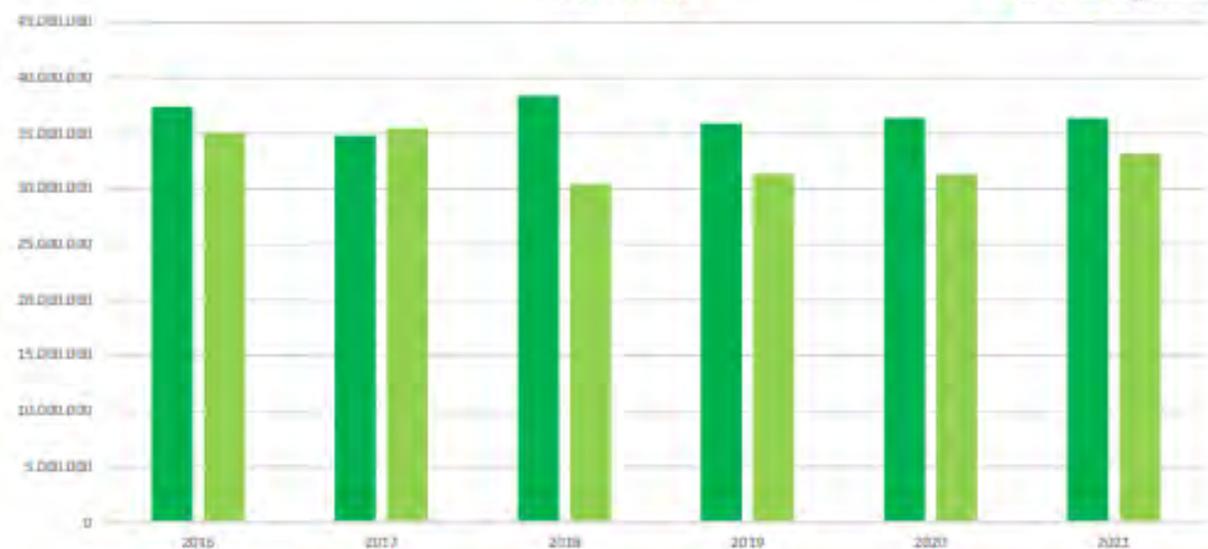
Production

Fruit & Vegetables 2021 production (T)



Production (T)

Fruit Vegetables



Fruit (T)

Production 2020	Production 2021	Production 2016-20/2021	% 2020/2021	% 2016-20/2021
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Total	36.401.156	36.368.673	36.578.777	-0,1%	-0,60%
Apples & pears	11.420.571	11.379.878	11.379.456	-0,4%	0,00%
Citrus fruit	7.985.236	8.049.090	7.737.319	0,8%	3,90%
Melons & papayas	4.640.190	4.956.720	4.729.627	6,8%	4,60%
Stone fruit	4.990.916	4.760.603	5.576.915	-4,6%	-17,10%
Other fruit	2.867.677	2.886.676	3.183.493	0,7%	-10,30%
Table grapes	2.763.086	2.622.396	2.685.513	-5,1%	-2,40%
Dates, figs, exotics	1.075.160	1.039.510	723.659	-3,3%	30,40%
Bananas	658.320	673.800	562.795	2,4%	16,50%

Vegetables (T)

Production 2020	Production 2021	Production 2016-20/2021	% 2020/2021	% 2016-20/2021
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Total	31.325.718	33.201.262	32.734.489	6,0%	1,40%
Other vegetables	6.246.034	6.752.259	5.903.543	8,1%	12,60%
Tomatoes	6.150.309	6.428.536	6.523.092	4,5%	-1,50%
Cabbages & cauliflowers	4.937.340	4.902.506	5.205.992	-0,7%	-6,20%
Onions, shallots, garlic & leeks	3.468.914	3.862.158	3.574.702	11,3%	7,40%
Lettuce & chicory	3.302.523	3.634.317	3.009.213	10,0%	17,20%
Carrots, turnips & edible roots	3.243.026	3.619.384	4.662.101	11,6%	-28,80%
Cucumbers & gherkins	2.559.492	2.567.142	2.482.894	0,3%	3,30%
Leguminous vegetables	1.418.081	1.434.960	1.372.952	1,2%	4,30%

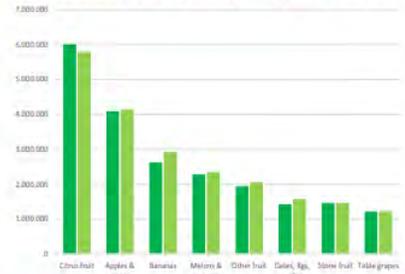
The trade trends

Intra-EU shipments and extra-EU exports



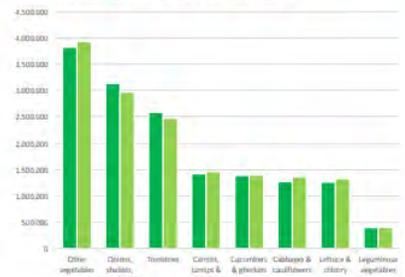
Fruit (T)	Extra-EU exports 2020	Extra-EU exports 2021	% 2020/2021	Intra-EU shipments 2020	Intra-EU shipments 2021	% 2020/2021	Total 2020	Total 2021	% 2020/2021
Total	3.839.671	3.700.292	-3,63%	17.392.469	17.999.269	3,49%	21.232.141	21.699.560	2,20%
Citrus fruit	914.335	826.984	-9,55%	5.114.417	4.985.317	-2,52%	6.028.752	5.812.302	-3,59%
Apples & pears	1.436.479	1.492.842	3,92%	2.673.629	2.668.961	-0,17%	4.110.108	4.161.804	1,26%
Bananas	45.250	19.855	-56,12%	2.604.271	2.927.334	12,41%	2.649.521	2.947.190	11,23%
Melons & papayas	276.258	277.522	0,46%	2.030.788	2.090.356	2,93%	2.307.047	2.367.878	2,64%
Other fruit	500.352	455.140	-9,04%	1.465.136	1.621.372	10,66%	1.965.489	2.076.512	5,65%
Dates, figs, exotics	209.077	191.289	-8,51%	1.241.226	1.409.738	13,58%	1.450.302	1.601.027	10,39%
Stone fruit	268.537	250.098	-6,87%	1.212.570	1.235.328	1,88%	1.481.107	1.485.427	0,29%
Table grapes	189.384	186.562	-1,49%	1.050.432	1.060.861	0,99%	1.239.816	1.247.423	0,61%

Total extra-EU exports + intra-EU shipments (T) 2020 2021



Vegetables (T)	Extra-EU exports 2020	Extra-EU exports 2021	% 2020/2021	Intra-EU shipments 2020	Intra-EU shipments 2021	% 2020/2021	Total 2020	Total 2021	% 2020/2021
Total	3.625.682	3.453.178	-4,76%	11.683.450	11.898.377	1,84%	15.309.133	15.351.556	0,28%
Other vegetables	816.596	833.241	2,04%	3.006.126	3.102.304	3,20%	3.822.722	3.935.545	2,95%
Onions, shallots, garlic & leeks	1.527.450	1.398.002	-8,47%	1.603.984	1.568.267	-2,23%	3.131.434	2.966.269	-5,27%
Tomatoes	428.641	362.361	-15,46%	2.150.623	2.103.600	-2,19%	2.579.264	2.465.961	-4,39%
Carrots, turnips & edible roots	120.841	137.761	14,00%	1.306.897	1.332.774	1,98%	1.427.739	1.470.535	3,00%
Cucumbers & gherkins	217.701	212.988	-2,17%	1.178.460	1.190.143	0,99%	1.396.161	1.403.131	0,50%
Cabbages & cauliflowers	250.488	277.037	10,60%	1.032.714	1.094.439	5,98%	1.283.202	1.371.476	6,88%
Lettuce & chikory	219.581	216.776	-1,28%	1.048.943	1.119.531	6,73%	1.268.524	1.336.306	5,34%
Leguminous vegetables	44.383	15.012	-66,18%	355.702	387.320	8,89%	400.086	402.333	0,56%

Total extra-EU exports + intra-EU shipments (T) 2020 2021

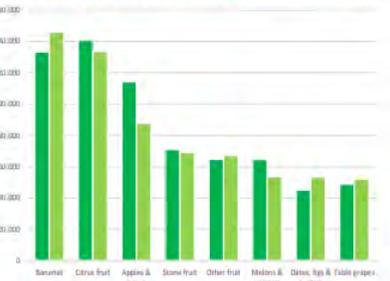


Intra-EU receipt and extra-EU imports



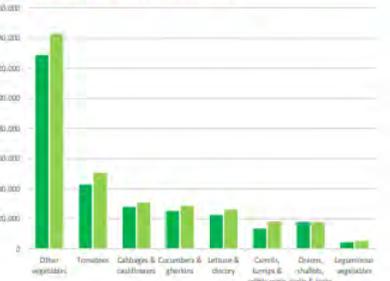
Fruit (T)	Extra-EU imports 2020	Extra-EU imports 2021	% 2020/2021	Intra-EU receipt 2020	Intra-EU receipt 2021	% 2020/2021	Total 2020	Total 2021	% 2020/2021
Total	12.125.529	12.373.229	2,04%	17.140.475	17.298.721	0,92%	29.266.005	29.671.950	1,39%
Bananas	5.243.989	5.260.213	0,31%	3.053.750	3.213.803	5,24%	8.297.738	8.474.016	2,12%
Citrus fruit	2.186.344	2.158.340	-1,28%	4.682.754	4.496.634	-3,97%	6.869.098	6.654.974	-3,12%
Dates, figs, exotics	1.919.481	2.096.486	9,22%	1.233.125	1.322.267	7,23%	3.152.606	3.418.753	8,44%
Apples & pears	516.560	505.950	-2,05%	2.518.237	2.557.587	1,56%	3.034.797	3.063.537	0,95%
Melons & papayas	772.411	776.804	0,57%	1.881.197	1.851.104	-1,60%	2.653.608	2.627.909	-0,97%
Other fruit	589.607	594.528	0,83%	1.539.089	1.645.532	6,92%	2.128.696	2.240.061	5,23%
Table grapes	730.020	807.987	10,68%	994.047	1.010.792	1,68%	1.724.068	1.818.779	5,49%
Stone fruit	167.116	172.920	3,47%	1.238.276	1.201.001	-3,01%	1.405.393	1.373.920	-2,24%

Total extra-EU imports + intra-EU receipt (T) 2020 2021



Vegetables (T)	Extra-EU imports 2020	Extra-EU imports 2021	% 2020/2021	Intra-EU receipt 2020	Intra-EU receipt 2021	% 2020/2021	Total 2020	Total 2021	% 2020/2021
Total	1.911.716	2.089.648	9,31%	11.069.181	11.245.386	1,59%	12.980.897	13.335.034	2,73%
Other vegetables	495.553	540.517	9,07%	2.845.079	3.005.160	5,63%	3.340.632	3.545.677	6,14%
Tomatoes	618.546	702.299	13,54%	2.002.372	1.933.621	-3,43%	2.620.918	2.635.919	0,57%
Onions, shallots, garlic & leeks	334.249	362.048	8,32%	1.508.648	1.574.092	4,34%	1.842.897	1.936.139	5,06%
Carrots, turnips & edible roots	93.029	83.200	-10,57%	1.308.120	1.266.404	-3,19%	1.401.149	1.349.604	-3,68%
Cucumbers & gherkins	79.284	99.284	25,23%	1.117.058	1.094.633	-2,01%	1.196.342	1.193.917	-0,20%
Cabbages & cauliflowers	75.777	70.272	-7,26%	1.013.063	1.021.143	0,80%	1.088.840	1.091.415	0,24%
Lettuce & chikory	10.578	12.522	18,37%	847.440	884.491	4,37%	858.018	897.013	4,54%
Leguminous vegetables	204.700	219.506	7,23%	427.400	465.844	8,99%	632.100	685.350	8,42%

Total extra-EU imports + intra-EU receipt (T) 2020 2021



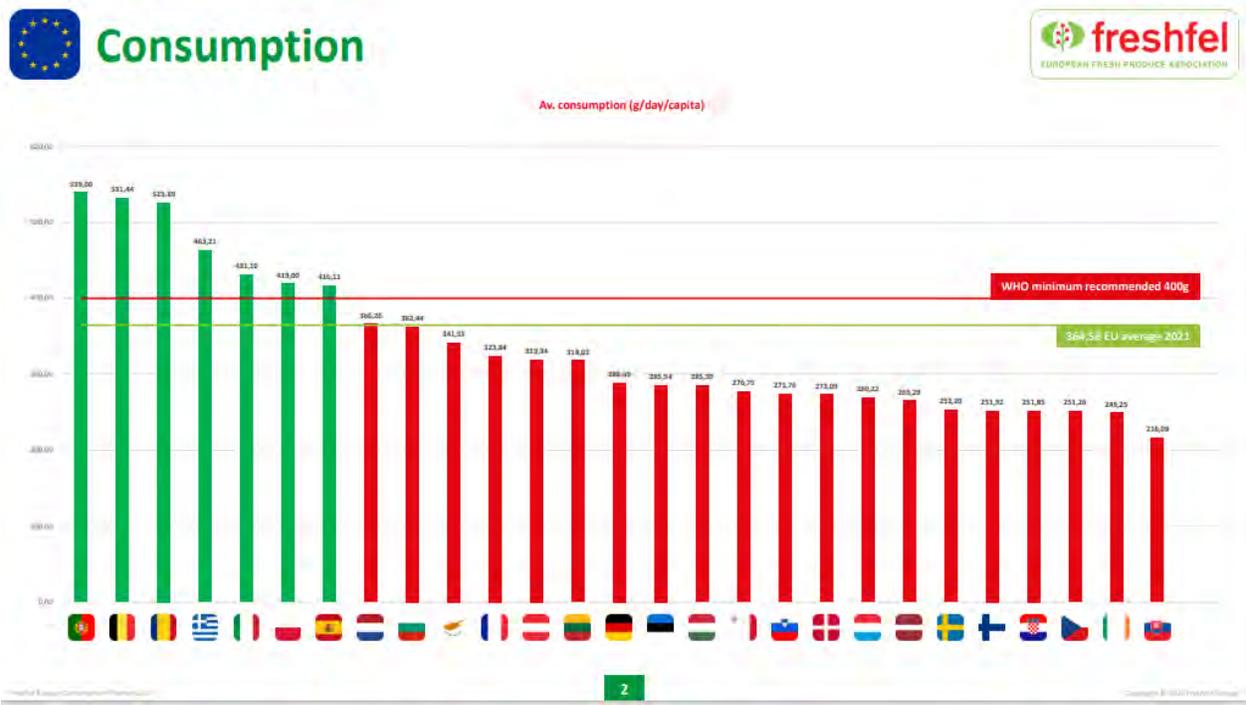
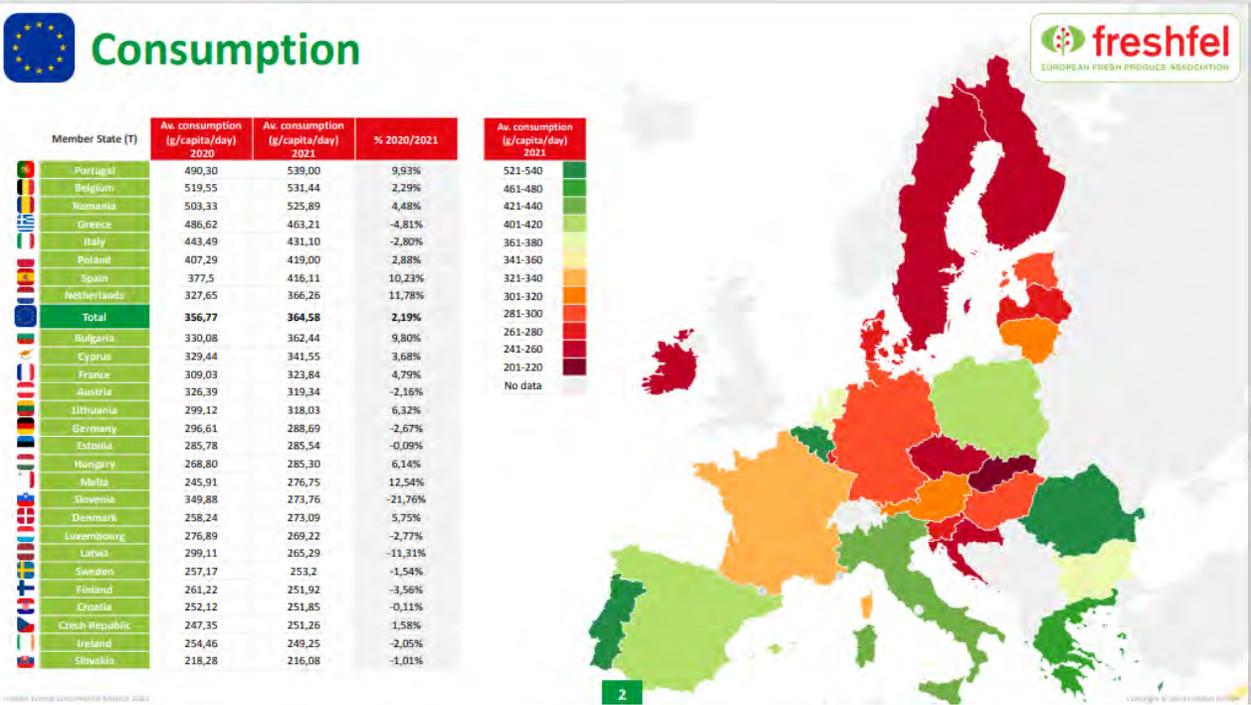


Market size

Member State (T)	Market size 2020	Market size 2021	% 2020/2021
 Total	72.839.533	74.354.475	2,08%
 Italy	12.068.051	11.651.020	-3,46%
 Germany	11.254.783	10.952.734	-2,68%
 France	9.515.250	9.996.352	5,06%
 Spain	8.152.309	8.998.717	10,38%
 Poland	7.053.621	7.233.840	2,55%
 Romania	4.438.718	4.607.176	3,80%
 Netherlands	2.602.271	2.920.224	12,22%
 Belgium	2.731.356	2.801.681	2,57%
 Portugal	2.303.167	2.532.520	9,96%
 Greece	2.379.744	2.256.827	-5,17%
 Austria	1.325.513	1.301.481	-1,81%
 Hungary	1.198.126	1.266.656	5,72%
 Czech Republic	1.206.852	1.203.087	-0,31%
 Sweden	1.211.791	1.199.059	-1,05%
 Bulgaria	1.046.888	1.143.740	9,25%
 Denmark	686.058	727.661	6,06%
 Finland	658.514	636.051	-3,41%
 Ireland	576.356	569.319	-1,22%
 Slovakia	543.544	538.264	-0,97%
 Croatia	466.814	463.811	-0,64%
 Lithuania	381.318	405.653	6,38%
 Slovenia	334.569	263.418	-21,27%
 Latvia	260.335	229.151	-11,98%
Estonia	173.283	173.277	0,00%
Cyprus	133.472	139.626	4,61%
Luxembourg	79.097	77.964	-1,43%
Malta	57.731	65.166	12,88%



The consumption trends



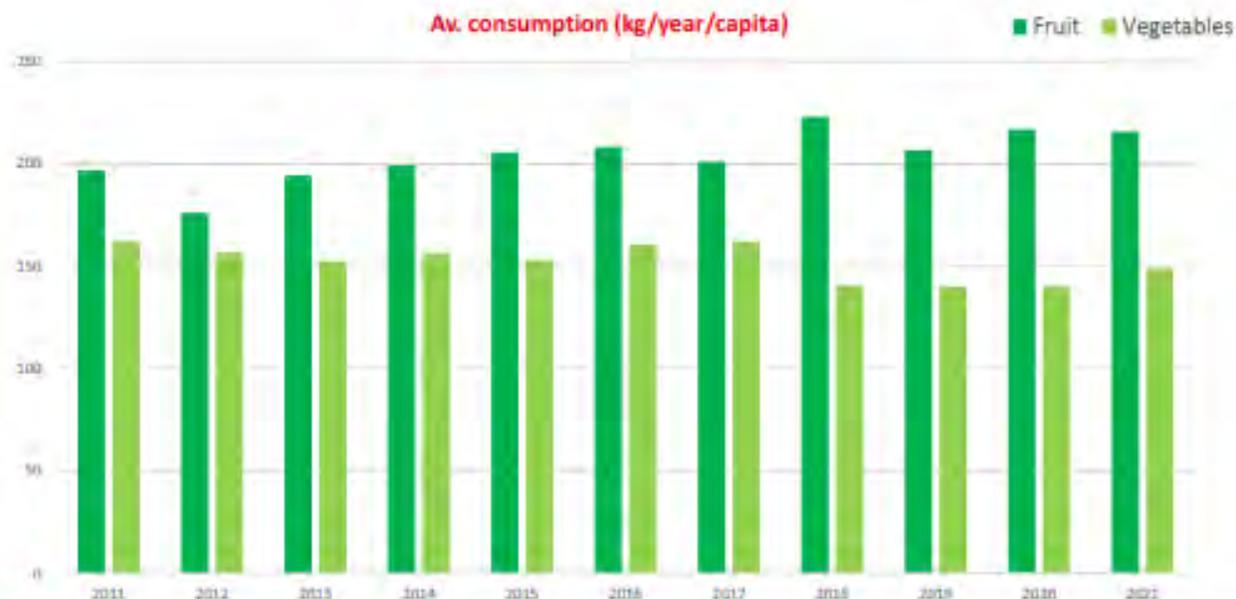


Consumption

	Av. consumption (g/capita/day) 2016-20	Av. consumption (g/capita/day) 2020	Av. consumption (g/capita/day) 2021	% 2020/2021	% 2016-20/2021
Total	360,00	356,77	364,58	-2,80%	-1,90%
Fruit	211,14	216,26	215,78	-6,60%	-1,70%
Vegetables	148,87	140,50	148,80	6,70%	-2,40%



Av. consumption (kg/year/capita)



Fruit 2021 av. consumption (kg/year/capita)

Vegetables 2021 av. consumption (kg/year/capita)



Consumption trends 2023

Momentum for consumption

- **Consciousness of consumers**
 - Consumers awareness of health benefits
 - Covid new drive to be kept
 - Build on existing policy with dedicated budget such as Promotion policy and School scheme
- **Fruit and vegetables role to societal challenges**
 - Green Deal => contribution to carbon neutrality
 - Farm to fork => contribution to plant (based) diet
 - EU beating cancer plan => contribution to prevention
 - Fresh produce prime position in regard to health and environmental assets

=> Future of the planet is in our plate

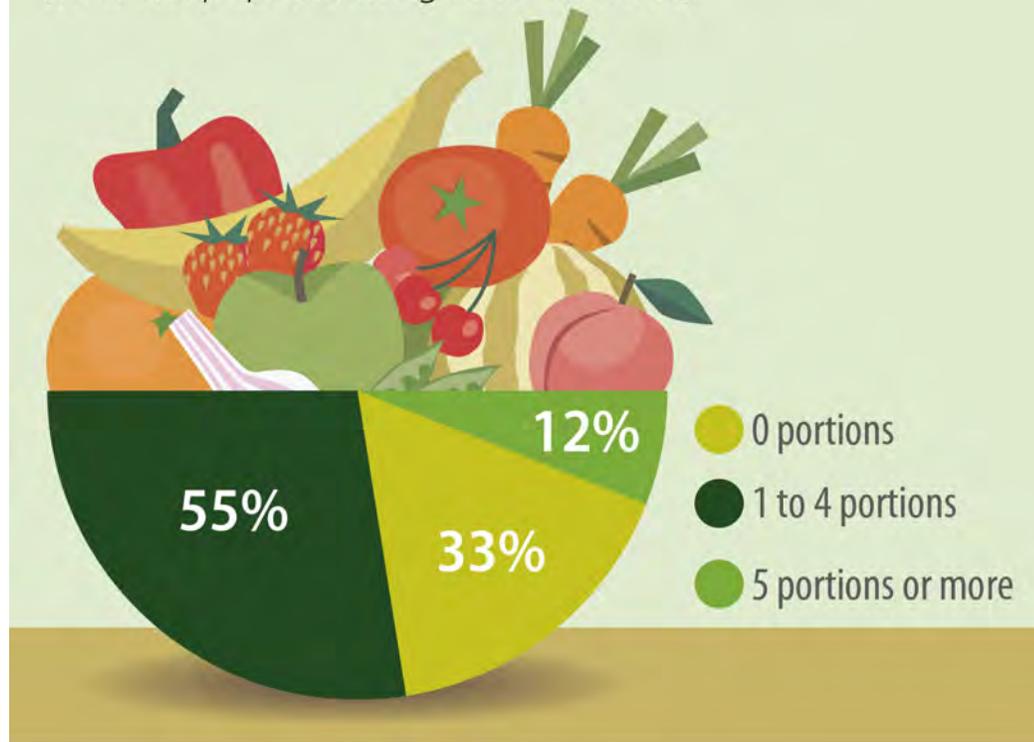
Barriers to consumption

- **Consumers drivers**
 - Prices misperception (F&V are affordable and one of the cheapest food category but not perceived as such
 - Absence of concrete actions to implement awareness
 - «Lazy» approach towards cooking and preparing food
 - Generational challenges : low consumption by millennials and youngest despite movement such as vegetarian/vegan , plant diets
- **Effects of economic crisis**
 - Declining purchasing power and inflation
 - Crisis situation lead to « unhealthy eating»
 - Cost of unhealthy eating => 1€ spend on food required 2 € to address unhealthy diet
- **Policy**
 - Packaging
 - Labelling uncertainties
 - Promotion policy and new ineligibility criteria

Consumption trends 2023

Daily consumption of fruit & vegetables in the EU, 2019

(% of the population aged 15 and over)



ec.europa.eu/eurostat

Member State	Number of FV portions eaten every day		
	0 portions	From 1 to 4 portions	5 portions or more
Total	33%	55%	12%
Ireland	19%	48%	33%
Netherlands	42%	29%	30%
Denmark	39%	39%	23%
France	25%	55%	20%
Lithuania	41%	43%	16%
Belgium	17%	68%	15%
Portugal	27%	58%	14%
Luxembourg	48%	38%	14%
Finland	38%	49%	14%
Estonia	39%	47%	13%
Greece	33%	55%	12%
Malta	36%	52%	12%
Germany	33%	56%	11%
Spain	23%	66%	11%
Italy	24%	66%	11%
Croatia	29%	62%	10%
Poland	38%	54%	9%
Slovakia	41%	50%	9%
Hungary	36%	56%	8%
Cyprus	33%	59%	8%
Czechia	48%	44%	8%
Sweden	38%	55%	8%
Latvia	54%	39%	7%
Austria	36%	59%	6%
Slovenia	32%	63%	5%
Bulgaria	47%	48%	5%
Romania	74%	24%	2%

Methodological differences

- [Survey \(EUROSTAT\)](#)
- Calculation based on production, import, export, and waste figures (Freshfel)
- Products included

Consumption trends 2023

- Consumption in 2022 estimated to have declined by 10%
- Down trends ongoing in 2023 with purchasing power of consumers under pressure
- Consumers look for prices and move away from premium quality and organic, logos and labels are not critical elements in buying decision process
- Consumers change their attitude in buying without stopping (search for promotion and discount prices, less purchases but more frequency,...)
- More than ever, fragmentation of consumers and their expectations /purchasing attitudes
- Suppliers push for consumers to buy primarily local
- Fruit and veg remain affordable, but not perceived as such –excessive promotion actions
- Difficulties to pass on to consumers the added cost of production, less inflation or even deflation for some products
- When retailers don't want to raise prices, shelves remain empty in time of shortage



	General inflation	Food	Bread and cereals	Meat	Fish and seafood	Milk, cheese and eggs	Oils and fats	Fruit	Vegetables	Sugar
Euro area	8.6	16.6	18.4	15.6	12.9	26.3	30.0	6.8	12.2	14.2
Belgium	7.4	19.2	20.4	15.7	17.2	29.1	34.7	12.0	20.9	15.3
Bulgaria	14.1	25.9	18.6	27.8	15.6	38.9	21.1	8.7	19.4	28.0
Czechia	19.1	26.2	27.5	27.2	14.1	34.0	31.1	12.1	15.1	29.6
Denmark	8.4	14.9	16.4	15.6	13.9	21.9	17.7	5.3	12.8	12.2
Germany	9.2	20.5	23.4	18.9	20.6	36.0	33.5	5.4	12.6	13.6
Estonia	18.6	28.5	31.6	30.9	28.9	29.4	24.3	20.2	20.5	28.2
Ireland	7.5	13.0	13.5	14.5	8.9	21.6	19.0	10.4	8.0	9.0
Greece	7.3	15.6	18.6	19.4	2.3	25.0	23.3	1.2	10.9	9.3
Spain	5.9	15.5	18.7	13.3	10.3	26.5	31.3	4.7	14.1	16.4
France	7.0	14.4	13.4	15.0	14.3	19.0	29.8	7.7	13.3	11.5
Croatia	12.5	17.9	27.4	15.8	14.9	27.0	5.8	7.4	4.9	19.9
Italy	10.7	12.6	16.4	10.8	10.1	19.4	27.2	5.0	5.8	15.9
Cyprus	6.8	10.3	13.0	17.2	10.5	17.8	32.5	-11.4	-1.2	13.3
Latvia	21.4	28.5	34.9	27.8	24.3	32.8	31.5	20.4	13.3	28.1
Lithuania	18.5	32.0	38.5	29.1	24.9	41.0	34.4	20.1	21.3	34.2
Luxembourg	5.8	12.1	12.5	11.3	8.9	16.9	23.8	8.0	11.7	9.2
Hungary	26.2	48.2	64.5	40.7	38.1	69.0	34.5	30.3	36.3	27.7
Malta	6.8	12.1	11.5	17.6	3.7	14.6	25.7	8.2	1.4	15.0
Netherlands	8.4	17.7	18.0	17.7	19.9	28.0	31.5	7.4	13.4	15.0
Austria	11.5	17.3	17.3	19.0	17.4	25.9	27.5	6.6	15.2	10.6
Poland	15.9	20.6	22.5	22.9	21.1	25.6	24.3	14.1	14.2	22.9
Portugal	8.6	21.1	20.7	20.3	12.7	31.0	33.6	18.0	26.1	16.5
Romania	13.4	23.2	25.8	17.8	20.9	31.7	37.7	16.0	22.7	28.6
Slovenia	9.9	19.8	17.2	20.6	13.1	27.2	35.7	17.3	14.8	12.8
Slovakia	15.1	28.6	27.5	30.2	18.7	37.3	35.5	17.0	22.4	24.6
Finland	7.9	16.3	17.4	20.0	15.8	21.0	24.4	9.9	11.5	15.7
Sweden	9.6	20.9	20.4	16.8	23.8	31.3	35.9	16.5	18.8	14.7

Apples supply balance

Italy	2021/2022	2020/2021	2019/2020	2018/2019
Production	2.053.000	2.124.000	2.096.000	2.264.000
Processing	256.000	254.000	377.000	316.000
Intra EU supply	495.465	616.823	528.287	470.333
Export	395.346	379.075	345.295	262.369
Domestic Sales	906.188	874.102	845.418	1.215.298
Intra EU receipt	95.468	37.824	60.549	24.983
Import	6.345	5.752	5.818	5.153
Market size	1.008.002	917.677	911.786	1.245.434
Population	59.983.000	59.240.000	59.640.000	59.816.000
Consumption kg /capita	17	15	15	21

Apples supply balance

France	2021/2022	2020/2021	2019/2020	2018/2019
Production	1.383.000	1.337.000	1.651.000	1.470.000
Processing	262.000	227.000	333.000	295.000
Intra EU supply	175.512	202.055	224.102	203.983
Export	157.323	149.979	190.141	326.644
Domestic Sales	788.165	757.966	903.757	644.372
Intra EU receipt	119.770	106.881	109.314	99.492
Import	14.353	12.917	14.885	19.843
Market size	893.582	851.931	998.187	724.022
Population	67.842.000	67.530.000	67.485.000	67.490.000
Consumption kg /capita	13	13	15	11

Apples supply balance

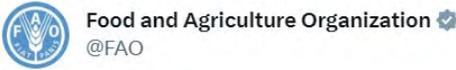
Poland in T	2021/2022	2020/2021	2019/2020	2018/2019
Production	4.300.000	3.410.000	2.910.000	4.810.000
Processing	2.580.000	1.875.000	1.455.000	2.645.000
Intra EU supply	433.716	424.599	307.391	421.290
Export	366.217	360.091	350.199	555.144
Domestic Sales	920.067	750.310	797.410	1.188.567
Intra EU receipt	43.856	48.269	36.789	34.050
Import	129	52	476	584
Market size	964.053	798.631	834.674	1.223.200
Population	37.650.000	37.840.000	37.958.000	37.972.000
Consumption fresh kg /cap	26	21	22	32



Food is water. Let's stop #FoodWaste to safeguard water

#FoodWaste

It takes around **70** litres of water to produce an apple



#DYK it takes 70 litres of water to produce one apple? 🍏💧

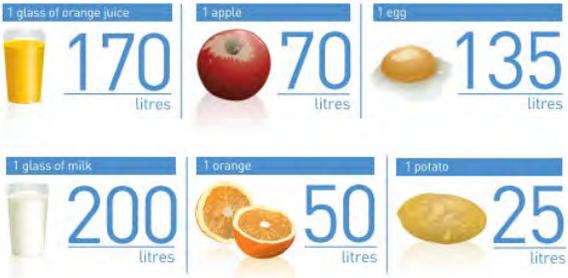
When you waste food you also waste the resources that went into producing it! #foodwaste #ZeroHunger



VIRTUAL WATER HOW MUCH



WATER IS NEEDED



TO PRODUCE...?





THANKS

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