FRUIT AND VEGETABLES

For a healthy Dutch economy and society
within the European Union, the Netherlands holds fifth position in the production of vegetables and tenth in the production of fruit.

THE NETHERLANDS; GLOBAL PLAYER

The Netherlands is a global player in the field of fruit and vegetables. The fruit and vegetable cluster is the Netherlands’ third export sector and accounts for almost €14 billion (including processed products). The Netherlands exports fresh fruit and vegetables to 150 countries across the world. This means that in three out of four countries worldwide, shops sell fruit and vegetables from the Netherlands.

The Netherlands is considered to be one of the most productive countries. Our growers had a €2.9 billion turnover in fresh fruit and vegetables in 2014. Within the European Union the Netherlands holds fifth position in the production of vegetables and tenth in the production of fruit. The Netherlands also plays a key role in fresh produce logistics.

Over seventy percent of the imported fruit and more than eighty percent of the imported vegetables are re-exported. Almost three quarters of the Dutch fruit and vegetable cultivation is exported. This all leads to the conclusion that the Netherlands fulfils a unique transit function.

Within the enterprising Dutch economy, the fruit and vegetable sector is a vibrant, innovative cluster. Numerous organisations play an important role where production, trade and retail are concerned, such as branch organisations, education institutions and knowledge centres, NGOs, and banks. Dutch products and knowledge are essential to ensure safe, healthy and tasty products. Not only for the current consumer but also for nine billion future world citizens.

Fruit and vegetables, the natural solution for a healthy society!
With €3.4 billion, fresh fruit and vegetables are of great importance to Dutch supermarkets (Source: Nielsen 2013).

Top 5 most commonly grown fruit and vegetables in the Netherlands:
1. Onion
2. Tomato
3. Carrot
4. Cucumber
5. Pear
(Source: CBS 2013; in kilos)

Top 5 most commonly imported fruit and vegetables by the Netherlands:
1. Orange
2. Banana
3. Pineapple
4. Grape
5. Apple
(Source: Eurostat 2014; in kilos)

What is the origin of the imported fresh fruit and vegetables?
1. Spain
2. South Africa
3. Chile
4. Peru
(Source: Eurostat 2014; in value)

Top 10 export values fresh fruit and vegetables in 2013:
1. Germany €2,805
2. United Kingdom €932
3. Russia €600
4. Belgium €509
5. France €428
6. Sweden €284
7. Norway €254
8. Denmark €216
9. Poland €203
10. Italy €164
(Source: Eurostat; in million euros from the Netherlands)

Export champion agricultural sectors in 2013:

- Fruit and vegetables (Fresh and processed) €13.9
- Meat and meat products €8.3
- Dairy products and eggs €8.0
- Floriculture €7.9

(Source: Eurostat; in million euros from the Netherlands)
“Make sure that half your plate is filled with fruit and vegetables!” This recommendation by the US government deserves a wider exposure.

FRUIT & VEGETABLES; THE NATURAL KEY TO GOOD HEALTH

Fruit and vegetables are packed with vitamins, minerals, fibres, trace elements, and natural proteins (in the case of mushrooms). Moreover, fruit and vegetables generally contain little fat and calories while they do fill the stomach. Sailors in the Middle Ages discovered that eating citrus fruits was efficacious against scurvy. This insight formed the foundation for the discovery of vitamin C. It is generally acknowledged that eating enough fruit and vegetables is of great importance to our health. In addition to healthy living and exercise, nutrition plays a key role in the prevention of conditions such as cardiovascular diseases, strokes, diabetes, obesity, and various types of cancer.

The Dutch Health Council recommends a daily consumption of 200 grams of vegetables and 200 grams of fruit for adults. On average, we eat about half this amount in the Netherlands, despite strong indications that an increased consumption of fruit and vegetables will lead to a longer, healthier and more vital life. Calculations based on the figures of the Dutch National Institute for Public Health and the Environment (RIVM) show that an extra serving of 156 grams of fruit and vegetables per day (sufficient to meet the recommendations) can result in saving €2.7 billion in health care costs over the next 20 years.

“Make sure that half your plate is filled with fruit and vegetables!” This recommendation by the US government deserves a wider exposure. In addition, increasing the eating occasions of fruit and vegetables by eating them, for example, as a snack or during lunch, is a good way to boost consumption. The Dutch fruit and vegetable sector is ready to support these health steps.

Henk Reinen
MT member, board of directors VGP, Ministry of Health, Welfare and Sport

According to the present knowledge, an increase in the consumption of fruit and vegetables of 156 grams per person per day will save at least €2.7 BILLION in health care costs over the next 20 years.

(Source: estimate by Berenschot based on figures from the RIVM)
strict requirements during the production, processing and distribution of fruit and vegetables contribute to safe products. The law dictates that each company is responsible for the safety of its products. This includes the identification of risks and the carrying out of control measures. To check the effectiveness, companies are required to do research on residues of plant protection products. This is collectively controlled in the fruit and vegetable sector by the independent foundation Food Compass. In collaboration with the chain partners, the Fresh Produce Centre coordinates the risk and crisis management for food-producing horticulture.

Food security and food safety will be key themes in the 21st century. With all the food scandals in mind, transparency, authenticity, and food safety are of great importance to each consumer. Strict requirements during the production, processing and distribution of fruit and vegetables contribute to safe products. Thanks to an increasing prosperity, the eating pattern has also changed towards a higher quality of fruit and vegetables and more animal proteins. The productivity needs to increase while the environmental footprint should decrease. The Dutch agro-food sector has shown for years that intensification and sustainability can go hand in hand. Worldwide there is a great need for Dutch knowledge, technology and organisational skills. Minister Kamp of Economic Affairs presented this market opportunity as: “Dutch solutions for global challenges.”

“The Dutch fruit and vegetable sector is the global leader in the field of sustainable and healthy production. This is reflected in the low quantity of residues on fruit and vegetables. In this respect the Netherlands scores significantly better than other countries. The process, however, is not yet completed. Less use of pesticides that are harmful to bees, more biological control agents. This is what domestic and foreign supermarkets, as well as consumers, ask for. In my opinion, collaboration in the chain is the key to success.”

Sijas P. Akkerman
Head of Food, Natuur & Milieu
“Fit is the new rich,” said former top skater Erben Wennemars in a TV-interview. The longing for health and quality of life is a noticeable trend in which a healthy diet plays a key role. Fruit and vegetables are available for every budget. The challenge is now to entice consumers to incorporate healthy habits in their daily routine.

People want to know where their food is coming from and what it contains. Their preference for locally produced natural food is also increasing. Vegetable products directly from the grower are gaining ground. But the same also applies to new players who deliver all ingredients for a complete meal at home and who serve a growing group not willing to exchange healthy and tasty food for convenience. Authentic is a word which has been on the rise in food country for years. In this respect, the comeback of ‘forgotten’ vegetables such as Jerusalem artichokes, kohlrabi, parsnips, and black salsify is quite significant. ‘Dutch Cuisine’ is the initiative of some chefs who want to rediscover original Dutch dishes. Within Dutch Cuisine the focus lies mainly on fresh vegetables.

Food channels will increasingly overlap. Supermarkets offer products for ‘on the road’ or set up a dining area. At the Market Hall in Rotterdam you can both shop for and eat good food. Several cities have similar food markets where quality and a diverse supply are the top priority. Grocery shopping will then become a true experience.

Healthy, varied, transparent and sustainable are words that characterise the trends mentioned above. Consumers want their meals to be more varied and healthy as well as tasty. The fruit and vegetable sector is totally prepared to meet those needs.

“Fruit and vegetables are part of the solution. If we can succeed in getting people to eat more fruit and vegetables and less animal proteins, we are doing something good towards both people’s health and the environment. The sector does not yet seem to be fully aware of its social importance. There is progress, however! The sector needs to expand their circle of friends, for example, and include health care. The thought that we can eat the world healthier is fascinating.”

Frank Kalshoven
Director of De Argumentenfabriek

TRENDS IN FOOD
LAND; TASTY, HEALTHY, AUTHENTIC AND SUSTAINABLE

PEOPLE WANT TO KNOW WHERE THEIR FOOD IS COMING FROM AND WHAT IT CONTAINS. THEIR PREFERENCE FOR LOCALLY PRODUCED NATURAL FOOD IS ALSO INCREASING.
IN 2014, THE PRODUCTION VALUE OF DUTCH GROWN FRUIT AND VEGETABLES WAS € 2.9 BILLION.  

(Source: LEI)

THE NETHERLANDS IS WORLDWIDE THE NO. 1 EXPORTER OF FRESH VEGETABLES AND THE NO. 4 IN FRESH FRUIT.  

(Source: Comtrade / Fruit & Vegetable Facts 2013)

IN 2014, THE EXPORT OF DUTCH GROWN FRESH FRUIT AND VEGETABLES REACHED A RECORD HIGH OF 3.15 BILLION KILOS.  

(Source: KCB)

THE NETHERLANDS, THE GLOBAL NUMBER 1 IN THE EXPORT OF  

(Source: Comtrade / Fruit & Vegetable Facts 2013; In value)

NUMBER OF CULTIVATION COMPANIES

(Source: CBS 2014)

THE DUTCH FRUIT AND VEGETABLE SECTOR EMPLOYS NEARLY 130,000 PEOPLE.  

(Source: CBS 2013)

MOST COMMONLY EATEN FRESH FRUIT AND VEGETABLES IN THE NETHERLANDS

1. Tomato  
2. Onion  
3. Cucumber  
4. Carrot  
5. Cauliflower  

1. Apple  
2. Orange  
3. Banana  
4. Mandarin  
5. Pear  

(Source: GFK 2014; In kilos)

SINCE 2000, THE PRODUCTION OF FIELD VEGETABLES HAS INCREASED BY ALMOST 25% AND THAT OF GREENHOUSE VEGETABLES BY ALMOST 30%.  

(Source: CBS 2013)

PER HECTARE OF VEGETABLE CULTIVATION THE NETHERLANDS IS ALMOST TWICE AS PRODUCTIVE AS THE EU AVERAGE BUT USES FAR LESS WATER.  

(Source: FAO Statistical Yearbook 2014)

IN 2014, THE PRODUCTION VALUE OF DUTCH GROWN FRUIT AND VEGETABLES WAS € 2.9 BILLION.

104,000 HECTARES FOR THE CULTIVATION OF FRUIT AND VEGETABLES

54,990 ha  
24,635 ha  
19,180 ha  
4,830 ha  

Arable farming vegetables  
Field vegetables and mushrooms  
Fruit  
Greenhouse  

(Source: CBS 2014)

1,440

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Due to the boycott, the export to Russia has decreased substantially from the summer of 2014 onwards.
“Annually, the port of Rotterdam receives more than 8.5 million tons of refrigerated and frozen cargo, of which more than ninety percent is in containers. This cargo is of great strategic importance for players in the port, and for commerce in the Netherlands as a whole. Together with the companies, we want to further strengthen the leading position of the Netherlands in the refrigerated and frozen food sector.”

The Netherlands is a global player in the fruit and vegetable trade. This calls for adequately streamlined logistics. The Netherlands is responsible for six percent of the world trade in fruit and for sixteen percent of the world trade in vegetables. A convenient location, good infrastructure and good logistics with professional distribution companies have ensured that the Netherlands is a major transit hub. The Netherlands is an important gateway to Europe for many types of fruit and vegetables but this will not remain the case by itself.

The Netherlands offers a comprehensive range of products that almost no other country can match. The reason being the combination of products produced in the Netherlands and the import of fresh products from more than one hundred countries.

The Netherlands is a specialist in organising and distributing product flows, including collecting, (re)packaging and processing. This is where the Dutch fruit and vegetable cluster has great added value. It is expected that the current transit function of the Netherlands will merge into a European breeding, production, import, collection, trade, processing, marketing, distribution, and services network.

In the busy Netherlands, streamlined logistics aren’t always self-evident. The multi-annual programme Fresh Corridor was aimed at providing solutions for increasing traffic and CO2-emissions, while strengthening the competitiveness of the sector at the same time. The sequel to Fresh Corridor provides the building blocks for international networks for transport by road, water and rail. This strengthens the competitiveness and is better for the environment!

The Netherlands is a specialist in organising and distributing product flows.
For Dutch retailers it is crucial to focus on fruit and vegetables. One of the unique characteristics of this category, unlike any others, is a very positive image due to the fact that it is fresh and healthy. Including potatoes, it is the largest and most profitable category of the supermarket with a substantial growth potential, partly due to trends such as good health, freshness and convenience! For retailers, the department contribution of this category is more than healthy. More sales have a positive effect on the return.

The competitive position of the Dutch fruit and vegetable sector in the world is partly due to the close collaboration within the chain. Together, seed breeders, growers, suppliers, greenhouse builders, knowledge centres, wholesale, logistics, and retail form a powerful and innovative cluster. The chain parties know where to find each other and are well attuned. The model of the ‘Golden Triangle’, where government, businesses and knowledge centres collaborate closely, also works well in the fruit and vegetable sector.

Geographically, there are some hotspots worth mentioning in the Netherlands. Of the six Dutch Greenports, three are of importance to the fruit and vegetable sector. These are Greenport Noord-Holland Noord, Greenport Westland-Oostland and Greenport Venlo. Part of Greenport Noord-Holland Noord is the so-called ‘Seed Valley’ in West Friesland. It is seen as a global centre where plant breeding and seed technology are concerned. Globally speaking, Dutch breeding companies hold a very strong position.

With nearly 2,500 hectares, the Westland is the largest unbroken greenhouse horticulture area in the world. Half of this is used for the growing of vegetables. The area around Venlo is strongly focused on agro-logistics. The Betuwe and Zeeland are not part of the Greenports but distinguish themselves in the field of fruit production. The Barendrecht region is an important cluster for the sale of fruit and vegetables.

The most important sales channel for fruit and vegetables is the supermarket. Seventy percent of all the fruit and vegetables we produce or import into the Netherlands ends up on supermarket shelves. Ten percent goes to specialist shops and street trading (market), while twenty percent goes to food services such as hotels and catering services. In addition, the online sales and ordering of fresh fruit and vegetables is in development.
IN 2020, CONSUMERS MUST BE ABLE TO DEPEND ON THE FACT THAT ALL FRESH FRUIT AND VEGETABLES IN SUPERMARKETS ARE SUSTAINABLY PRODUCED.

The sector has been working on the sustainability of cultivation and distribution for many years. Thus, the energy efficiency in the greenhouse horticulture has doubled since 1990. As a result, and despite the increase in production, CO₂-emissions have decreased by a quarter. The renewable energy share is steadily increasing and is now 2.9 percent. Binding long-term agreements on energy efficiency were made within the entire sector. There are also several geothermal projects in progress. Geothermal heat is underground heat in deeper layers (deeper than 1,500 meters). Calculations show that the sector can save at least ten percent on the consumption of fossil fuel by using geothermal heat.

The sector has launched a branch sustainability plan in 2015. Within this plan, goals were formulated until 2018 in the field of transport and consumer packaging. Examples include replacing banana boxes with durable banana collapsible crates, prolonging the shelf life of products through packaging, and reducing the use of plastic consumer packaging.

Together with various stakeholders, the fruit and vegetable sector has initiated the ‘Covenant Sustainable Purchasing Fresh Fruit and Vegetables’ of Initiatief Duurzame Handel (IDH). It states that consumers in 2020 should be able to depend on the fact that all fresh fruit and vegetables in the supermarkets have been sustainably produced.

Consumers increasingly opt for sustainable and organically grown products. Headed by the current twentysomethings, consumers will go for convenience, healthy, varied, fresh, tasty and sensible in 2040.

In the project “The Sustainability of Fruit and Vegetable Chains, from Farm to Fork”, all partners in the chain work on various sustainability themes, such as crop protection and residues, water consumption, energy consumption, CO₂-reduction, waste prevention, and counteracting of wastage. The number of exceedances of the maximum allowable level of residue of plant protection products in the Netherlands and the EU is very low. Fruit and vegetables from the Netherlands are safe.

INCREASINGLY SUSTAINABLE, FROM FARM TO FORK

“...consumers must be able to depend on the fact that all fresh fruit and vegetables in supermarkets are sustainably produced.”

Jan Zegwaard
Commercial Director Greenco, producer and packager of snack vegetables
Bavo van den Idsert
Director Bionext

“The organic fruit and vegetable sector in the Netherlands is among the top in the world. Our organic growers are able to produce in accordance with the highest private standards comparable to Bioland and Naturland in Germany and BioSuisse in Switzerland. The organic produce trade is capable of marketing their products at home and abroad, with additional organic fruit and vegetable products from all corners of the earth. The demand for organic produce will rise explosively throughout the world. This offers the Dutch fruit and vegetable sector plenty of opportunities as fresh will be at the forefront in that growth.”

In the Netherlands, in the same year, we consumed organically grown fruit and vegetables for a total value of €173 million. This is 16.4 percent of the total organic sales. The total consumption of organic products in the Netherlands passed the 1 billion euro threshold in 2013. Organically grown fruit and vegetables take up an important position as they are the first of the product groups to inspire consumers to buy organic variants. The majority of organic fruit and vegetables is bought in supermarkets with specialist shops in second place.

The sector association of the organic sector Bionext has established a total trade value of €372.4 million in respect of the export of organically grown fruit and vegetables in 2014. Germany, with a share of forty percent, is the main market. In Europe, the Netherlands is the market leader in organically grown spinach, peas, beans, carrots, and onions. The Netherlands is a major producer of organic vegetables for processing in baby food, frozen food, and canned food. The export of organic greenhouse vegetables increased last year by ten percent, making it the largest export growth.

The popularity of organic products - especially fruit and vegetables - has increased rapidly in recent years. This is reflected in a consumption growth in 2013 of 10.5 percent for organically grown vegetables and 9.2 percent for organically grown fruit compared to 5.4 percent for all organic products.

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The fruit and vegetable sector is a highly innovative and enterprising sector with a dominant international position. Thus, the sector is important for the economy and employment in our country.

Ruud Huirne
Director Food & Agri Rabobank, the Netherlands

The fruit and vegetable sector is a high-quality innovation cluster. The tomatoes and strawberries which are eaten today are not the same as those of ten years ago. Specialised plant breeding companies are constantly developing new fruit and vegetable varieties that are more resistant to pests and diseases, give a higher yield and have a better taste. However, big developments are still taking place in cultivation and fresh produce logistics.

Most companies in the fruit and vegetable sector are either medium-sized or small. They are able to switch quickly and realise innovations. This is why tomato grower Duijvestijn from Pijnacker was declared the best tomato grower in the world by an international jury in February 2015 as a result of their sustainable working methods. Some financial institutions have a long tradition in the sector and are willing to make resources available to enable innovations.

Innovation in the sector includes matters such as smarter logistics, greater product differentiation, the creation of more eating occasions, encouraging a healthy food choice, forming alliances, reducing phytosanitary risks, and the sustainability of production.

The fruit and vegetable sector falls under the Top Sector Agrofood as well as the Top Sector Horticulture and Basic Materials. The business world, knowledge centres, and the government are working hard to find solutions for tomorrow’s challenges. Innovative ICT applications make it possible to speedily and effectively exchange large amounts of data in the chain. With information on, for example, consumer experiences or market data, we can strengthen the market orientation of the sector and, ultimately, be of better service to consumers. The Fresh Produce Centre and Frug I Com work together on the project BIG&u in which data is made available in an efficient and standardised manner.
The Netherlands has the most extensive and varied flow of fruit and vegetables in the world. If we add value to that for consumers and society, you may rightly speak of one of the most promising manufacturing industries of our country.

In Asia, there are huge opportunities for growth and the consumption of fruit and vegetables is increasing substantially.

The Dutch fruit and vegetable sector fulfils a global need for safe, healthy, and tasty food. In this respect, the sector is a global player. There are huge opportunities for growth, especially in Asia, and the consumption of fruit and vegetables is increasing substantially. In the Netherlands, the sector is well-prepared to meet this growing demand. However, making inroads into new markets is not easy. It took five years before an agreement was signed on the export of Dutch pears to China. These projects can take a very long time from start to finish.

The Fresh Produce Centre is committed to open borders worldwide for Dutch products. They are working on a protocol for the export of sweet peppers to China, the Brazilian market has recently been opened for Dutch pears and Dutch onions have managed to find their way to Indonesia and Panama since 2014.

To enter new markets, the collaboration between the business world and governments is crucial.

For some time there has been talk of consolidation within the sector. However, the total production has increased while the number of companies has decreased. Through upscaling and rapid innovation the Netherlands has managed to maintain their strong position on the global stage. And yet the sector is also vulnerable. Geopolitical relations and food safety issues can completely block access to certain markets.

The main economic and social challenge we face is to persuade consumers to eat more fruit and vegetables. This affects the quality of life and also has a major social impact on, for example, health care costs and employment.

Estimates based on calculations by Berenschot, using a combination of sources (Freshfel, export statistics, RIVM among others).
A HEALTHY FUTURE

Why has the consumer been eating less and less fruit and vegetables in the past few years? This question deserves an in-depth consumer study in the Netherlands, Germany and the United Kingdom. The study will investigate matters such as changing purchasing patterns, eating habits, and cooking techniques. The position, barriers, and opportunities for processed vegetables will be investigated as well.

Against a backdrop of fiercely increasing health care costs, it pays to invest in prevention through eating healthy. The fruit and vegetable sector is active in various fields to encourage the consumption of fruit and vegetables. The sector has accepted the challenge by engaging in several public-private partnerships with government, knowledge centres, health institutions, and businesses.

A ‘Work fruit’ pilot was initiated to make people who do heavy physical work or work in shifts eat more fruit. The greatest health gains can, of course, be achieved by teaching children that fruit and vegetables are an essential part of the daily diet. In the pilot project ‘Veggie Time’ an extra vegetable moment is created at day-care centres and the ‘Canteen Change’ project increases the supply of fruit and vegetables to school cafeterias.

Only a healthy sector can make an optimal contribution to a healthy future. The Fresh Produce Centre offers companies consumer knowledge, enabling them to focus more on differentiation and added value. During thematic meetings for the sector, companies can gain inspiration and consumer knowledge to help increase the consumption of fruit and vegetables. Forming alliances with other parties is also part of the strategy. In this context the Fresh Produce Centre is organising a Vegetable Congress in 2015 in collaboration with health care.

CHILDREN LIKE FRUIT AND VEGETABLES TOO

“A WORK FRUIT” PILOT WAS INITIATED TO MAKE PEOPLE WHO DO HEAVY PHYSICAL WORK OR WORK IN SHIFTS EAT MORE FRUIT. THE GREATEST HEALTH GAINS CAN, OF COURSE, BE ACHIEVED

A ‘Work fruit’ pilot was initiated to make people who do heavy physical work or work in shifts eat more fruit. The greatest health gains can, of course, be achieved

“STARTING TO EAT VEGETABLES EARLY IN LIFE IS THE STEPPINGSTONE FOR A HEALTHY LIFESTYLE AND A HEALTHY FUTURE. PÆDIATRICIANS NOT ONLY HAVE A CURATIVE BUT ALSO A PREVENTIVE TASK. THE COLLABORATION WITH THE FRUIT AND VEGETABLE SECTOR PRESENTS THE UNIQUE OPPORTUNITY TO JOIN HANDS TO ENCOURAGE THE CONSUMPTION OF FRUIT AND VEGETABLES.”

Koen Joosten, Paediatrician Erasmus MC Sophia
In the past two years, hotels, restaurants and catering companies spent almost TWENTY PERCENT MORE on fresh fruit and vegetables.

(Source: Foodstep 2015)
APART FROM BEING A MAJOR PILLAR OF THE DUTCH ECONOMY, FRUIT AND VEGETABLES ARE ALSO ESSENTIAL FOR A HEALTHY LIFESTYLE.