



Activity Report 2015



This Activity Report provides an overview of Freshfel's work since the previous Freshfel AGM 2014 in September 2014 until to October 2015. This work will not have been possible without the leadership of the Freshfel Board, the active support of all the members and associated members throughout the year.

The support of sponsors also made possible the publication of this annual report.



Not yet a Freshfel member?

Freshfel's resources are exclusively resulting from membership fees.
A strong organisation can only be built by gaining the support of all the stakeholders in the fresh produce supply chain. Freshfel Europe thanks its members and associated members for their support!

To learn how to become a Freshfel member, scan the code on the right



www.freshfel.org
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www.freshquality.eu



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Anecoop

Anecoop has been part of your world for the last 40 years. Customers, cooperatives, farmers, employees, suppliers and consumers who have all worked together in over 70 countries to grow **a company which, above everything else, looks after people.**

You **And** **Anecoop.**

As producers, our fruit and vegetables are the culmination of a working model that is based on four cornerstones: healthy eating, food safety, the environment and the social economy.

Growing these values has enabled us to reach different milestones, such as becoming **Spain's leading fruit, vegetable and salad stuff producer.** We have the capacity to offer a wide range of Spanish-grown fruit and vegetables all year round, including innovative lines of produce adapted to consumer demands, thanks to years of research on our farms.



Anecoop



Foreword

This Activity Report is released on the occasion of the 2015 Annual General Assembly of Freshfel Europe (October 2015). It provides a “*state of play*” of the fresh produce sector, covering business trends and key policy areas that Freshfel has been involved. I hope you will enjoy reading this report.

I took over my chairmanship of Freshfel in a year of extreme challenges, given the ongoing consumption concerns and the far reaching implications of the Russian embargo. The fruit and vegetable sector is the most affected sector by the sanctions implemented by the Russian Federation. Despite losing a market representing close to 40% of its export potential, the sector responded promptly to look for new market outlets and diversify its export destinations. Although some significant successes were recorded, average prices for many fresh produce categories plummeted both on the export side and on the domestic market. This greatly affected the return to the sector.

At a time that the sector is gearing to stimulate consumption, it is confronted by an appalling attitude of the new leaders of the European Commission, eager to remove the successful school fruit and vegetables scheme. This scheme was introduced in 2009 to remedy the Pan-European obesity challenges and improve the diet and consumption attitude of the youngest. It is an essential tool to change the diet of European consumers in the long run. The lack of concerns, ambitions and priorities of the Juncker Commission for the health and diet of the European citizens is alarming.

During the last year, Freshfel’s agenda has been quiet diversified and guided by the motivation to assist the sector to reposition itself. The Association multiplied its efforts to accompany the industry in this process. These efforts range from improving the sector competitiveness, conquering new markets by addressing SPS hurdles both at export and import levels as well as enhancing the quality and safety of produce. Additionally, efforts are focusing on nutrition,

health and sustainable aspects and improving the image, communication and promotion of the sector. Furthermore, the Association was involved in exploring the opportunities of the new research and innovation policy.



Freshfel embarked in a task force with AREFLH and EUFRIN to build a strategic agenda outlining the priorities for fresh produce. Moreover, the Association also got involved in two research programs under the Horizon 2020, namely EUROMIX and FRESH DEMO. The Articles of Association were modified at the last AGM to facilitate the coordination role of Freshfel with some of its members eager to work collectively on matters of common concerns for the industry.

At Freshfel Europe, we are motivated to represent the general interest of the sector, taking into account the divers interests of the membership. With the strong support of my colleagues in the Board, we have taken actions and initiatives to move the sector to a more competitive business environment and to provide tools for the sector to cope with the industry challenges. I would like to underline the great willingness of the membership to work together and cooperate on matters of common concern, which consequently facilitates the work of our Secretariat.

Freshfel needs to remain strong and professional to address the future. Therefore, the Association trusts on the continuous support and input of its membership, to move the produce business towards a successful and fruitful future.

Luc Clerx
President of Freshfel Europe



Working together for sustainable agriculture

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10 years of experience
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What started off in 2005 with a small team at Bayer is now a global success story with many Food Chain Partnership projects running in the world, and global agreements signed with major players throughout the food value chain.



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food chain partnership



Freshfel Europe - Organisation and mission



Freshfel Europe is the European umbrella organisation for the fruit and vegetable sector in Europe and beyond. Its members are associations and companies with an interest in the European fresh fruit and vegetable sector, including production, trade, logistics, retailing and other service providers. Freshfel Europe is a non-profit association under the Belgian law of 1918 and is based in the heart of the European district in Brussels. Freshfel Europe is in the EU transparency register under the reference n° 1637225479-02.

Freshfel Europe is governed by an annual General Assembly for statutory and corporate matters, a Board for the overall management and coordination of the Association activities and several Divisions and Committees to cover the various political and technical aspects relevant for the sector. Besides the Board assignments, which are *ad personam*, Freshfel Europe operates in an open manner as all its members and associated members can attend meetings organised by the association. Board representatives can be viewed on the Freshfel Europe’s website (www.freshfel.org). The daily work of Freshfel Europe is conducted by a permanent secretariat based in Brussels.

Freshfel Europe is also a unique place for professional networking. Meetings are consistently well attended and contribute to foster discussions among the members and to set Freshfel’s priorities and positions. Freshfel Europe’s mission is to be a platform for the representation and the networking of the European fruit and vegetables sector with a view to enhance efficiency and competitiveness of its members across the supply chain. The following axes drive the daily work of Freshfel Europe:

- | Advise, inform and represent members interest on EU policy matters or industry topics
- | Facilitate international trade of fresh produce
- | Assist members to comply with the highest safety, environmental and CSR rules/standards
- | Secure a favourable environment to promote the benefits of fresh produce
- | Increase the efficiency of promotion within Europe and share best practices
- | Position the sector in research and innovation
- | Stimulate the consumption of fresh fruit and vegetables, emphasizing health assets as well as diversity of taste and texture and the fun & pleasure to consume fresh fruit and vegetables

FRESHFEL STRUCTURE

Presidency

President
Vice-President
Treasurer

Divisions/Committees

Production
Import
Export
Wholesale & Distribution
Retail
Promotion & Communication
Food Quality and Sustainability
Convenience
Citrus committee
Banana committee



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ADVANCED POSTHARVEST SOLUTIONS



RESULTS THAT MAKE ALL THE DIFFERENCE

PRECISION TREATMENTS
Homogeneity in applications

WE MEASURE AND VERIFY
We believe in R+D+I

At Citrosol we maintain the freshness of your fruit so that it reaches the consumer with all its flavour and with perfect quality, just as it was picked ... so that the fruit is harvested on the supermarket shelf.

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- FORTISOL® Ca and FORTISOL® Ca PLUS
- PHILABUSTER 400 SC
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Freshfel Europe - External cooperation

In order to voice the professional views of the sector, Freshfel Europe regularly cooperates with the European Commission, the European Parliament and other EU institutions. The Freshfel members and secretariat regularly participate in EU Civil Dialogue Group and ad hoc Expert Groups of DG AGRI, SANTE and TRADE with a view of representing the sector. For some of these groups, notably the Civil Dialogue Groups on Horticulture and the Civil Dialogue Group on Promotion and Quality, Freshfel takes responsibilities of chairing or co-chairing these Civil Dialogue meetings.

The internal and external activities of Freshfel are driven by core values that are key for the good functioning and image of the association.

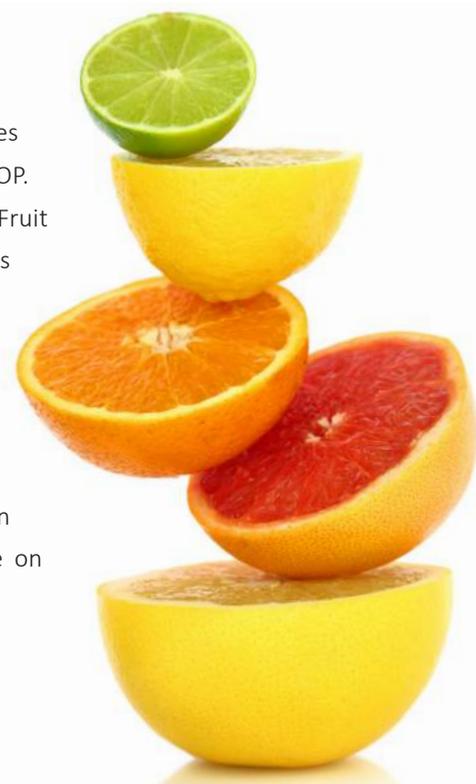
Within its daily working environment, Freshfel closely cooperates with organisations hosted in the same premises, namely WAPA (World Apple and Pear Association), SHAFFE (Southern Hemisphere Association of Fresh Fruit Exporters), ESSA (European Sprouted Seeds Association) and Europatat (European Potato Trade Association). Since December 2011, Freshfel also joined forces in the same premises with SACAR (Secretariat des Associations Agricoles Réunies) which incorporates FRUCOM (Dried Food Importers), Union Fleurs (International Flowers Trade) and Assuc (Trade in Sugar). This provides to the secretariat a broader perspective of EU agriculture sectors and also allows to activate multiples synergies and join forces on many administrative and policy issues. Freshfel also closely cooperates with other organisations at European level such as COPA-COGECA, AREFLH, PROFEL, AIJN, Food&Drink Europe, CELCAA, EUROCOMMERCE, EPHA, and ECPA, and is accredited with organisations such as FAO, WHO, UN/ECE, or OECD.

CORE VALUES	
✓	Leadership
✓	Cooperation across the supply chain
✓	Transparency of lobbying and industry representation
✓	Responsibility, accountability and ethical conduct
✓	Professionalism and quality of services towards Freshfel's members



International Arbitration Chamber and COFREUROP rules

Since 1967, a dedicated International Arbitration Chamber for fruit and vegetables (CAIFL) is available to the sector as well as a set of standard rules known as COFREUROP. The Chamber is based in Paris and Philippe Ruelle (UGPBAN) is currently chairing the Fruit and Vegetables Arbitration body. Early 2014, Freshfel and CAIFL decided to join forces and increase their cooperation. Freshfel joined the CAIFL in 2015, while providing the professional assistance of its membership to keep the COFREUROP guide up-to-date, in line with evolving business practice. Through its network, Freshfel provides to CAIFL with a greater visibility. In 2015, the rules of procedure of the Chamber were simplified and adjusted to take into account the evolution of law governing arbitration. The fees for arbitration were also revised downwards. These changes came into force on 1st July 2015. More information about the chamber are available on the Freshfel website on http://www.freshfel.org/asp/what_we_do/index.asp?doc_id=431



Freshfel Europe - Communication tools

Freshfel members receive up-to-date information through several communication tools:

- The **Freshfel Newsletter** is distributed to members on a weekly basis, every Monday morning. It includes the latest information on crucial legislation, policy developments and important developments within the fruit and vegetables sector. It also informs members about actions undertaken by the Association.
- The weekly **Freshfel Press Review**, published each Wednesday as an online paper, features a selection of international press articles and news from members that are of interest to the fresh produce business.
- Every two months, Freshfel issues a **Fresh Times**, giving examples of latest best practices and other initiatives undertaken relating to promote the consumption of fresh fruit and vegetables.
- Freshfel also publishes its **Freshfel Headlines** on a bimonthly basis to outline key activities and positions addressed to a larger audience within the public and private sectors.



Freshfel Europe - Communication tools

Next to the standard communication methods, Freshfel also regularly publishes press releases and position papers, whenever necessary. The Freshfel position papers are sent to different policy makers on a variety of topics to raise awareness for matters of interest to the fresh fruit and vegetable sector.

Furthermore, Freshfel has good connections with several Members of the European Parliament. Mem-

bers of Freshfel and the secretariat met with several MEPs and assistants on various occasions to exchange views during the last year. Meetings have taken place for example on topics relating to trade, organics or on the school fruit scheme (which is shown in the picture).



Fresh Fruit and Vegetables from Your Reliable Partner in Central and Eastern Europe





EVERYBODY
is **creative**



FEW can generate
new perspectives

Together, we can provoke
NEW POSSIBILITIES

with the human touch of



**CREATIVE
SOCIETY**

Proud partner of
Freshfel Europe!

Freshfel Europe - Communication tools

In addition to the Freshfel corporate website, the Association also operates a range of websites to provide members, stakeholders and consumers with a varied and useful information about fresh fruit and vegetables.



On www.enjoyfresh.eu, visitors find a wealth of information about the assets of fresh produce. The site offers insight into the nutritional benefits of fruit and vegetables, recent health studies related to fresh produce consumption, advice on how to store and cook fruit and vegetables and many other bits of information. A range of videos give further incentives of how to prepare a tasty meal with fresh produce. Freshfel invites visitors to make this website their regular companion and to enjoy fresh fruit and vegetables in different forms and fashions. It is also possible to follow the [Enjoy Fresh Facebook Group](#) and the Twitter account at [@enjoyfresh_EU](#).

On www.kidsenjoyfresh.eu, kids, parents and teachers find adapted information to let kids discover the benefits of healthy and tasty fruit and vegetables. For kids, the website offers games, quizzes, colouring books and many other incentives to have fun with fruit and veg. For parents, KidsEnjoyFresh gives valuable advice why fresh produce is good for the kids, and how to let them enjoy it in the best possible ways. Teachers can find useful information about the EU School Fruit scheme as well as fruit promotion initiatives in all parts of the world.



Freshfel's Fresh Quality Guide on the website www.freshquality.eu keeps fruit and vegetable professionals from all over the world updated about the current fresh produce legislation in the EU. The website is a one-stop shop to find out what are the applicable labelling rules, which pesticide restrictions apply and what quality standards products have to observe in Europe. Freshfel keeps the website updated to facilitate the trade of fresh fruit and vegetables in and out of Europe.

The Freshfel website www.freshfel.org is available for everybody who is looking for information about Freshfel's activities, its structure, role and mission as well as latest publications and press releases. Freshfel members find a wealth of up-to-date information, data, reports and presentations in the [Freshfel members' area](#), accessible from the Freshfel homepage. Members and interested parties can also remain connected with the association through the [Freshfel Facebook page](#), the [LinkedIn page](#) and the Twitter account at [@freshfel](#).



Fresh produce industry – Business trends

Fruit production (2013):

35.8 million T

Veg production (2013):

34.7 million T

Intra-EU f&v trade (2014):

28.9 million T

27 billion EUR

Production

The EU fruit and vegetables production destined for the fresh market (excluding products for processing) today accounts for more than 70 million T. The production is covering a wide diversity of categories. Apples, pears, citrus, peaches and nectarines, kiwifruit and melons/watermelons are the main fruit categories produce in the EU. Tomatoes, cabbages, onions, cucumbers, sweet peppers, carrots, salads and beetroots are the main vegetables categories. Over the last years and adjusting to evolving consumption, the overall EU production tends to decline, while the sector is investing in new varieties to better address consumers expectations for taste, texture and convenience.

Intra-EU trade

Within the EU, around 29 million T of EU fruit and vegetables are shipped among Member States. In 2014, this corresponded to almost 17 million T of fruit and more than 12 million T of vegetables. Germany remains the main recipient of fruit and vegetables, marketing close to 6.9 million T of imported produce in 2014, on top of its domestic production. Other major recipient markets include France (3.6 million T) and the UK (3.1 million T). Belgium and the Netherlands both received

around 1.6 million T from other Member States, though part of this volume will be reshipped afterwards and not consumed there. Poland also receives close to 1.6 million T from the other Member States.

Spain is the main supplier country accounting to a volume of almost 11 million T shipped to other EU-28 countries. The Netherlands ranked second with 5.4 million T (including both domestic and re-shipped produce). Italy and Belgium both shipped close to 3 million T to other EU countries. France is next in the ranking with about 2 million T. EU intra trade has been stable over the last few years.

MAIN EU SUPPLIERS TO OTHER MS - 2014			
Supplier	Fruit	Vegetables	TOTAL
Spain	6.381.958	4.510.083	10.892.041
Netherlands	2.178.961	3.259.400	5.438.361
Italy	2.199.179	781.605	2.980.784
Belgium	2.069.045	786.281	2.855.326
France	1.088.509	934.467	2.022.976
Germany	656.960	381.508	1.038.468
Greece	839.623	114.219	953.842
Poland	343.740	446.359	790.100
Portugal	280.627	204.546	485.173
Austria	189.515	128.763	318.278
Czech Republic	147.234	77.900	225.134
Hungary	139.910	80.203	220.113
United Kingdom	90.499	85.097	175.596
Slovenia	58.397	41.479	99.876
Other	317.668	239.437	557.105
TOTAL	16.981.824	12.071.347	29.053.172



Fresh produce industry – Business trends

Imports from extra-EU (2014):

13.1 million T

12.5 billion EUR

87% fruit, 13% veg

EU Import

The EU remains the largest importer of fruit and vegetables in the world. However, as a result of globalisation and greater demand in new markets in Latin America, Asia, Middle East or Africa, but also the side effect of the Russian embargoes and economic crisis in several markets, a process of diversification of international trade flow is taking place, leading to the opening of new markets, and increase demand from emerging economies. This has reduced the attractiveness of the EU. In 2014,



the EU imported around 13.1 million T (worth 12.5 billion EUR). A majority of 87% of imported volume is fruit. The main categories imported are bananas, pineapples, apples and pears from the Southern Hemisphere, as well as table grapes and citrus fruit. The EU remains a net importer as the volume imported exceeds the export volume. The biggest suppliers include South Africa, Costa Rica, Morocco, Turkey, Ecuador, Chile, Colombia, Peru, Brazil, New Zealand, Argentina, Israel, Egypt and Dominican Republic.

EU Export

The EU exports have been constantly growing since the turn of the century. In 2014, exports reached 6.2 million T (worth 4.8 billion EUR) of which 68% is fruit and 32% vegetables. Russia was the main recipient of EU produce, a status challenged by the embargo initiated by the Russian Federation in August 2014. Nevertheless, EU exporters managed to stabilize its exports and even increase the exported quantity with the opening of new markets and searching for new opportunities. However, the main difficulty had been the exporting value as this had decreased to 4.8 billion EUR in 2014. The main export destinations include Russia until August 2014, Belarus, Switzerland, Norway, Ukraine, Algeria, Brazil, Egypt and Senegal.

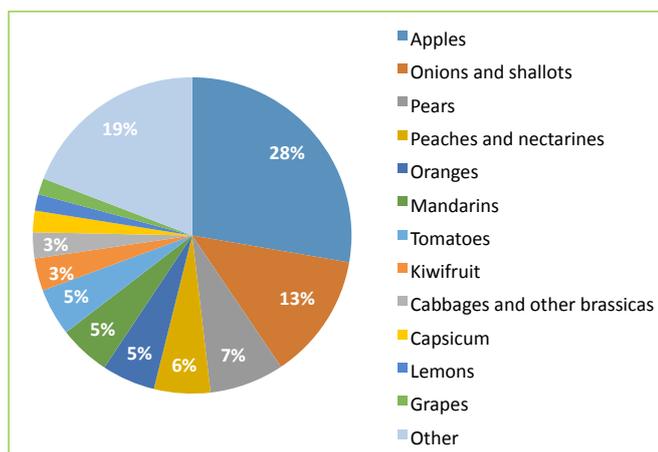
Exports to extra-EU (2014):

6.2 million T

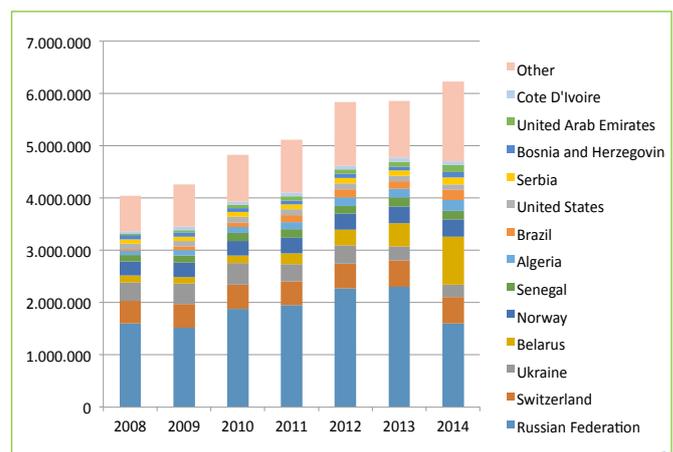
4.8 billion EUR

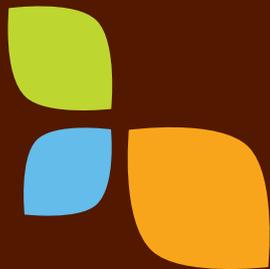
68% fruit, 32% veg

Exported products



Export destinations





PESTICIDES AND SUSTAINABLE AGRICULTURE



Health

Our Safe and Sustainable Use Initiative contributes to safeguarding farmer health and protecting the environment



Biodiversity

We work with partners to promote resource-efficient agriculture for the benefit of harvests and biodiversity



Water

Working together with key European stakeholders we're helping to keep pesticides out of water



Food

We actively address consumer concerns about pesticide residues; Europe's food has never been safer or healthier



Pesticides play a vital role in ensuring agricultural productivity and competitiveness. But our industry does a lot more than just help farmers put healthy, high-quality and affordable food on European tables. With projects in four thematic areas – Food, Water, Health and Biodiversity – we promote and encourage the safe and sustainable use of our technology in countries across Europe. Through innovation, agricultural productivity can help deliver benefits to society while protecting the environment, safeguarding health and promoting biodiversity.

The EU needs regulatory policies that foster rather than discourage this innovative spirit. Find out how Europe can ensure its place as a world leader in innovation and economic, social and environmental security: www.hungry4change.eu.

Fresh produce industry – Business trends

Consumption

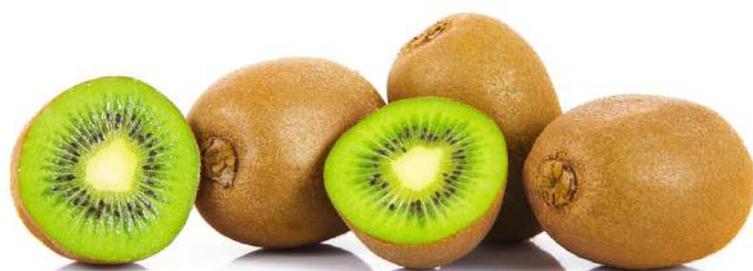
In June 2015, Freshfel launched the latest version of its annual Consumption Monitor, which includes the trends in production, trade and consumption up until 2013. The data shows that consumption in the EU-28 stands at 341.82 g/capita/day of fresh fruit and vegetables in 2013. This represents a slight increase compared to 2012 by 5.6%, but a decrease by 1.9% compared to the average of the last five years (2008-2012). On average, consumption levels remain under the minimum threshold recommended by the World Health Organization (WHO) of 400 g of fruit and vegetables per day. Out of the 28 Member States of the European Union, only six are able to meet this level of consumption.



EU 28 Consumption 2008-2013 (gr./cap./day)



This year the consumption monitor has also been adjusted more heavily to outbalance some clearly incorrect data, particularly relating to processing factors. The data behind the net consumption of fresh fruit and vegetables also takes into account a factor for waste of 20%.



Fruit consumption reached 188.60 g/capita/day in 2013. This is 10.1% more than in 2012, but still 1.5% less than the average of the years 2008-2012. In regard to vegetables, the per capita consumption in 2013 stands at 153.22 g/capita/day, corresponding to an increase of 0.5% compared with 2012 and of 2.3% compared with the average of the previous five years.

DEVELOPMENT OF CONSUMPTION 2013 VS. THE AVERAGE 2008-2012

Apples & pears	-1,6 %
Bananas	5,0 %
Cabbages, cauliflowers	-4,2 %
Carrots & turnips	1,1 %
Citrus fruit	-5,5 %
Cucumbers & gherkins	-4,1 %
Dates, figs & exotics	1,9 %
Leguminous vegetables	-14,3 %
Lettuce & chicory	-3,0 %
Melons & papayas	-6,0 %
Onions, shallots, garlic	2,8 %
Stone fruit	-5,0 %
Table grapes	2,9 %
Tomatoes	-7,3 %
Other fruit	-3,3 %
Other vegetables	1,4 %



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Fresh produce industry – Business trends

Statistical Extranet for members

In April this year, Freshfel Europe has launched a new online database that gives access to the production, import, export and consumption statistics of fresh fruit and vegetables in the EU and around the world. The program allows Freshfel members direct visualisation of data through graphs and tables as well as the extraction of data into Excel charts.

The new programme brings together trade and production statistics from the official databases FAOstat (production), Eurostat (EU trade) and UN Comtrade (global trade) for all fresh fruit and vegetables categories. It is designed as a simple and easily accessible tool. The production statistics show the production volume and harvested acreage for all individual fruit and vegetables in all countries of the world. The trade statistics in the EU and the world can be consulted for the overall fruit and vegetable trade but also in great detail (specific exporters and importers, specific products). The consumption figures are calculated by Freshfel on basis of official figures with the same methodology that lies behind the annual Freshfel Consumption Monitor. Consumption data should not be seen as hard evidence but can give valuable insights into trends and developments for different products in different EU and non-EU countries.



To further expand the analysis of these market data, Freshfel and its members are also active in the various ad hoc experts groups of the Commission services. Freshfel provides experts to the ad hoc experts group on citrus, tomatoes, peaches and nectarines and apples and pears. These experts were renewed and the number of Freshfel experts enlarged.

Freshfel also hold regular dedicated exchange on citrus to get the latest trends on production and trade at a global level. The reports of these meetings are available on the Freshfel website. Finally and through the cooperation of the secretariat with WAPA (World Apples and Pears Association), the Freshfel secretariat is also involved in the organization and compilation of the apples and pears productions as released in Prognosfruit.

freshfel EUROPEAN FRESH PRODUCE ASSOCIATION		EU Production					
Menu		Area Harvested (ha)			Production Quantity (T)		
Selections		2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015					
Category		EU Production - Production Quantity (T)					
Reporter EU	2000	2001	2002	2003	2004	2005	
Total	87.443.669,10	85.134.854,75	82.517.311,80	84.241.213,35	87.589.671,46	83.133.66	
Austria	1.169.338,50	1.105.404,50	1.141.293,20	1.167.529,00	1.219.426,60	1.114.18	
Belgium	3.002.953,00	2.632.605,00	2.791.856,90	2.954.913,20	3.197.837,40	3.034.29	
Bulgaria	1.616.142,70	1.260.565,10	1.105.578,50	1.498.147,40	1.164.712,10	638.37	
Cyprus	266.545,50	268.692,60	282.313,50	264.458,40	274.105,00	270.35	
Czech R...	833.614,80	653.959,30	497.387,80	451.778,60	464.513,50	410.42	
Denmark	248.754,00	249.281,00	243.373,00	265.308,00	270.936,90	270.02	
Estonia	83.996,30	85.517,60	69.317,00	72.252,10	67.034,10	76.19	
Finland	240.624,10	233.832,10	234.989,70	232.264,60	227.576,50	255.45	
France	9.404.335,60	9.493.976,90	9.576.563,30	8.854.515,00	9.172.722,10	8.796.62	
Germany	7.308.288,80	5.896.959,70	5.440.670,10	4.686.994,40	4.994.728,36	4.619.09	
Greece	4.576.507,00	4.673.774,60	4.533.890,50	4.183.103,50	4.245.555,60	4.300.86	
Hungary	1.941.567,70	2.031.237,90	1.769.292,30	1.860.268,00	2.295.211,10	1.692.39	
Ireland	230.291,00	238.555,00	228.818,00	219.766,00	262.400,00	271.70	
Italy	17.801.496,60	17.156.356,00	16.320.494,10	15.935.377,90	17.864.259,80	17.895.33	
Latvia	148.304,70	204.052,90	197.552,00	245.200,10	181.935,80	210.50	
Lithuania	417.420,00	456.560,00	357.790,00	629.516,20	394.855,80	463.37	
Luxemb...	16.796,70	7.647,00	15.685,90	8.017,10	15.106,90	8.53	
Malta	61.437,50	59.873,00	65.956,20	60.172,50	67.115,90	66.25	
Netherlands	3.556.105,00	3.412.862,00	3.520.167,00	3.636.841,00	3.850.811,00	3.770.75	
Poland	6.881.675,80	7.404.924,25	6.323.462,30	6.761.531,95	7.265.595,80	6.928.34	
Portugal	2.129.973,80	2.132.885,30	2.158.276,00	2.114.270,90	2.541.055,80	2.271.34	
Romania	4.480.015,00	4.851.831,00	4.576.425,00	6.448.233,80	6.200.022,00	4.882.64	
Slovakia	539.092,50	461.020,10	389.155,70	417.026,30	375.250,90	387.29	
Slovenia	243.460,80	163.341,30	240.837,90	192.192,70	260.423,90	221.25	
Spain	16.886.134,10	16.920.356,20	17.554.389,60	18.294.365,40	17.896.410,80	17.310.36	
Sweden	284.526,60	306.755,00	312.709,30	320.435,30	338.730,00	328.14	



FRESH PRODUCE CENTRE

At the heart of the industry

We are the centre of expertise in the Netherlands for fruits and vegetables, with a global outreach. Fresh Produce Centre focuses primarily on four key fields of knowledge:

Nutrition & Health

Food Safety & Quality

Market Intelligence & Statistics

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Fresh Produce Centre was established in early 2014 by Frugi Venta and the Dutch Produce Association.



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Freshfel activities at a glance

Some areas in which Freshfel is active:



Common agriculture policy

The EU finished its revision of the Common Agriculture Policy in 2013. The change had less impact on the fruit and vegetable sector as the revised Common Market Organisation legislation for fresh produce was already in place since 2007. However, as with any reform, also the last one brought along some changes to the sector such as the possibility for an association of Producer Organisations (POs), crisis and prevention measure instruments as well as changes to direct payments, EU aid for producer groups and changes to the entry price system. The European Commission continues its process of simplification and also adjust the legislation to the Lisbon Treaty.

The European Parliament has been relatively active on the CAP this year, including the production of a non-legislative report on the 2007 CMO reform for the fruit and vegetable sector. Freshfel, together with several members met with

the assistant of the responsible Member of the European Parliament to discuss the pros and cons of the current legislation. At the end of its process in the Parliament, the European Commission underlined its willingness to maintain the current legislation. The next review of the legislation for the fruit and vegetable sector will take place not until the next complete revision of the CAP in 2018.

Furthermore, there are more discussions starting in the European Parliament relating to the food supply chain. Another own-initiative report is being prepared on the relations in the food supply chain for which Freshfel will stay closely involved as well. Freshfel will continue to follow this and other CAP related matters in the year to come.





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Food & plant safety and quality

Organic farming



In March 2014, the Commission presented a proposal for new organic farming legislation. The Commission proposal follows a two-year consultation period with the sector in which Freshfel was very involved. During the last twelve months, the Association closely followed the debate at Council and Parliament level. The Freshfel working group was instrumental to shape a solid position for the industry. Freshfel confronted and coordinated its position with other organizations such as FRUCOM, COPA COGECA, IFOAM, or EPAGMA. Freshfel reviewed and voiced the position of its members to feed the discussion at the Council and Parliament.

In this process, many issues were discussed at length with the Freshfel experts in a dedicated working group. A position was reached in November 2014 and another one in April 2015 on many critical aspects of the current proposal. It covered aspects such as the requirement to move to a full conversion of the grower towards organic agriculture, the use of active substances and the MRL, the status of organic produce in case of cross contamination, the authorization of pesticides in third countries, the availability of organic seeds, the registration of operators, the fraud control systems, the monitoring of environmental performances and the articulation of the import system. The position was therefore all encompassing! Some issues remain pending on the sector's organic production agenda such as growing practices in greenhouses and the use of growing media. These issues are particularly sensitive but quiet relevant in regard to soil and subsoil protection as well as to the implication of use of nutrients. They are also important within an international context of equivalency (among other with the USA).

Freshfel will closely follow the final steps of the reform, but will also continue to assess members with practical and operational aspects of the organic legislation.

Marketing standards

The EU currently keeps specific marketing standards for the 10 leading categories of fresh fruit and vegetables. Since early 2015, the Commission is undertaking a review of all its agricultural marketing standards. This evaluation initiative could simplify the current legislation and better align the requirements to international voluntary standards. In this process, Freshfel opened an internal debate on the pro and cons of the simplification. Arguments to preserve the status quo are mainly related to the enhancing growers return, the better protection of consumers with compulsory standards and the shared control responsibility between public authorities and the private sector. On the other hand, the reliance on one single international standard and the possibility for the market, in particular for the foodservices sector, to decide to place some products that might best fit specific demands, would speak on behalf of a simplification. In addition, certain costs of control would be no more compulsory and therefore reduced. In this process, several other aspects have to be taken into account, including the access to the detailed standards in all the EU languages, aspects related to waste, the possible extension of norms by interbranch, market prices, the demand of "ugly or misshaped" product. It is therefore a discussion with multiple perspective and implications that need to be carefully balanced. The debate is due to continue later in 2015 and 2016.



Food & plant safety and quality

Food labelling

In the course of the last months, Freshfel looked at several aspects of the new legislation for labelling and information to consumers and the coherence of existing legislations in regard to labelling. Indeed, as specific labelling rules are provided in the marketing standards provisions of the Common Market Organization, the provisions of the new food information to consumers (Regulation 1169/2011) are not applying to fresh fruit and vegetables. This duality of rules often led to misunderstanding or incoherence between both legislations. The specific rules require in particular the information of the packer or dispatcher, while regulation 1169/2011 requires the information of the importer. As the incoherence remains, the matter will remain on Freshfel agenda to get better coherence, flexibility and harmonize set of rules.

Other aspects of concerns in regard to labelling policy relate to the new requirements of country of origin labelling for minimally processed products or fresh cut fruit and vegetables mixes. The Commission is currently evaluating the implication of the origin labelling as per the requirements of Regulation 1169/2011. Several case studies are in evaluation, harmonizing the need and relevance for consumers to be informed, the feasibility of this mandatory labelling and the balance between the costs and benefits. Several options remain open, including a simplified version of EU/non EU or voluntary/mandatory labelling. A report is due to clarify the way forward. Freshfel kept contact with the Commission services and provided its expertise and views to the contractors appointed by the Commission to evaluate the situation.

Novel foods

Freshfel was also called by its members to look into the current legislation on novel foods (Regulation 258/97). The legislation could lead to a lack of clarity about its scope for our sector. In specific, the sector is keen to clarify if the need to file applications would be restrictive to exceptional cases or on the contrary if it would apply more extensively when new varieties are placed on the market. This second option would have far reaching administrative implications for our sector. As some cases occurred in recent months (herbs, kiwi berries, and others), Freshfel, with its concerned members, is seeking to clarify the matter and avoid any interpretation that would give prejudice to the sector in the future.

Separately, Freshfel is also looking at the upcoming proposal of the Commission COM 2013(894) where a new definition of novel food is being considered and the overall legislation being revised. Freshfel expressed its views to the European Parliament which is evaluating the proposal at its committee level.



Food & plant safety and quality

Plant protection products and MRL

Food safety in fresh fruit and vegetables is linked to active substances, minor uses and their residues as well to matters relating to food additives, sanitizers, fertilizers and contaminants. Last year's activities have been no exception to the rule, demonstrating once again all the relevance of these matters, their impact on business and very often the pending gaps in the EU legislative framework given the evolution of technologies and consumer expectations.

Freshfel has welcomed some of the progress on minor use with the setting of a secretariat in the EPPO office in Paris. Freshfel remains concerned about new developments which might further limit the tools available for EU growers. These could endanger their competitiveness or jeopardize trade flows. This could result from the removal of authorisation of active substances, the changing judgement of safety of active substances, the reduction of MRLs, the evolving position on food safety with regards to MRLs and ARfD and the lack of good functioning of the mutual recognition system for authorizations of active substances.



Freshfel, together with representatives from Coceral, ECPA and Copa-Cogeca with the Cabinet of Commissioner V.P. Andriukaitis, DG Santé.



Freshfel took part at the meeting organized by "Agri-food Chain Roundtable for PPP"

All the matters related to food safety and quality are discussed twice a year together with members at *Freshfel Food Quality and Sustainability Working Group*. Freshfel is also actively involved in the activities of "Agri-food Chain Roundtable for Plant Protection products". At the start of 2015 Philippe Binard, the General Delegate of Freshfel, was elected as a chairman of this platform for a period of one year. As an active member of this working group, Freshfel secretariat took part in several meetings on behalf of the agri-food sector, like the meeting with the cabinet members of the Commissioner for Health & Food Safety, DG Santé and the European Parliament event on "A Call for a Coherent policy on Plant Protection Solutions, including Minor uses".

Microbiological risks

Following the EHEC crisis in 2011, most European Member States (MS) have significantly increased the number of controls aiming at controlling the microbiological safety of fruit and vegetables. As a result, the Member States have requested the Commission to draft guidance document on food products contaminated with STEC. Freshfel took part in the consultations and with the support of members provided valuable input to the Commission. Also, Freshfel took part in the consultation on *Specific guidance document on the implementation of hygiene requirements for food of non-animal origin*. The guidance document was drafted based on refined assessments for five priority commodities: leafy vegetables, berries, melons, tomatoes and bulb & stem vegetables. Freshfel will continue taking part in further consultations with regards to microbiological matters.

Freshfel secretariat also coordinates the activities of ESSA, the European Sprouted Seeds Association. ESSA took an initiative to draft the *ESSA hygiene guideline for the production of sprouts and seeds for sprouting*, and followed-up on import requirements for sprouts.



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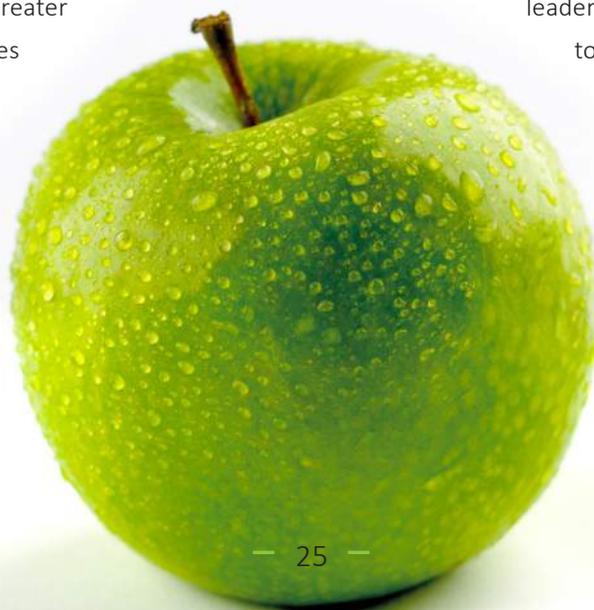
Plant health

Since 2010, the European Union is evaluating its plant health regime, a legislation reshaped in 2000 which finds its origins in 1977. A legislative proposal was released in May 2013 by the European Commission to adjust the legislation to the evolving environment and the new challenges of plant health and plant disease due to evolving pests, increased exposure due to the development of trade, climate change etc.

The protection of the European production against harmful organisms is of paramount importance as a sound production is a prerequisite to trade and consumption. The EU production represents the core of the supply on the EU market. The EU production should remain adequately protected from any contamination of harmful organisms not known to occur in the EU. Outbreaks of new diseases expose the growers to huge costs (PSA, drosophila suzukii, tristeza virus, sharka or more recently the xylella outbreak). Indirectly, new outbreaks could also confront EU production to new costs of treatment and expose exports to market closure or restrictions. These aspects were driving factors for the Freshfel position while avoiding to move into a too burdensome system.

During the last 12 months, Freshfel Europe carefully followed this complex dossier, in close collaboration with other stakeholders associations such as representatives of COPA COGECA, Union Fleurs, ESA, and Europatat. With this consortium, several follow up meetings took place to keep abreast of the latest developments of this dossier with the Commission services, the Greek, Latvian and Luxembourg Presidencies and with the new rapporteur of the dossier for the European Parliament MEP Mrs McIntyre. As both the Council and the Parliament finalized their positions, Freshfel and its colleague associations are closely following the trialogue negotiation. The political compromise will have to clear pending issues on the scope of the new legislation, the final articulation of the import regime (in particular for sensitive products and new trade) the extension of the products with plant health certificates and the financial implications and budget of the new regime. A compromise could be reached by the end of 2015, opening the debate on the delegated and implementing act of the revised legislation. This would include an in-depth revision of the annexes of the legislation with the list of pests and the requirements to remedy to these pests.

In parallel to this dossier, Freshfel has been for years calling for more reciprocity in exchange with third countries on SPS issues. The EU operates an open system, while several of our main trading partners impose us strict and excessive closed system. While export matters are not directly covered by the reform, Freshfel took the opportunity of the momentum to call for greater leadership of the Commission in the negotiations with third countries to remove SPS hurdles, pre-clearance and other delays in processing market access permits. This is now of particular relevance in the context of the Russian embargo and the need to rapidly open new market.



Food & plant safety and quality

Compliance with plant health legislation and Europhyt

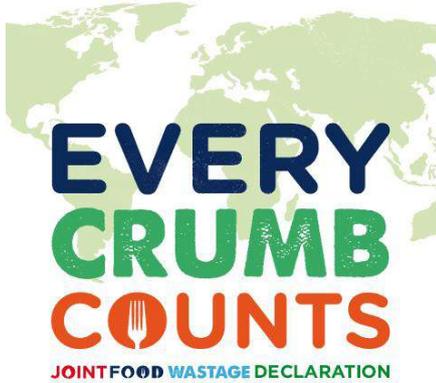
The Commission and the FVO are closely following the compliance of imports with the requirements of the directive 2000/29 to prevent the introduction of harmful organisms. The monthly and annual Europhyt reports are now the “barometer” of the non-compliances in regard to harmful organisms. On an annual basis, around 6.500 cases are reported in the system. Fruit and vegetables are accountable for a total of 2.400 interceptions. The nature of interceptions might vary between those resulting from the introduction of harmful organisms, from documentary or to wood packaging non-compliances. In 2014-2015, the Commission approached the countries responsible for the larger number of non-compliances including Cambodia, Dominican Republic, Ghana, Ivory Coast Kenya, Pakistan, Uganda, Sri Lanka, etc. This resulted, in coordination with the industry, to the need for several third countries to introduce detailed action plans to increase the controls and monitoring of exports with a view of reducing the number of interceptions.

Besides, and should the measures be deemed insufficient, the Commission decided to take some safeguard measures, ranging from market closure for several products from India and Ghana or to more detailed requirement in a safeguard close on citrus from South Africa. At the time of printing this report, the safeguard on Indian mangoes was already lifted, and the South African citrus season was developing with significantly improved records, a situation also underlined in the FVO report following a visit in South Africa earlier in 2015. Freshfel welcomed these improvements to keep trade flows without endangering the domestic production. Freshfel will therefore continue to closely follow the policy actions and encouraged supplying countries to take the necessary remedy actions to avoid a discontinuation of supply.

As the Europhyt report is becoming more important for day to day business, Freshfel made some recommendations to the EC Commission and FVO. Freshfel is aiming to have a system with information more accessible and more transparent. According to Freshfel, more detailed information about the interceptions would be desirable and should be included in the public data base, such as those already provided in the Rapid Alert system for food safety concerns. Freshfel recommended to revise the setup of the database to include an access to information regarding the volume intercepted, the Member States where interceptions were registered, the actions taken and the English name of CN Code of the product. This will improve the transparency but also help the sector at large to take the necessary steps collectively.



Sustainability



Sustainability continues to rapidly influence and change the political agenda. The concept of sustainability and sustainable food has also trickled down to the level of the consumer. Public authorities and consumers increasingly ask for sustainable food production, consumption and lifestyle.

For the fruit and vegetable sector, a key topic which falls under sustainability is food waste. This was addressed at EU level in 2013, with a consultation on sustainable food. The input gathered by the European Commission eventually led to a Communication being published on the matter, which focused heavily on reducing food waste. Freshfel, along with several other stakeholders who participated in the debate, launched a joint stakeholder declaration on food waste, called 'Every Crumb Counts'. The declaration constitutes a voluntary commitment to deal with food waste issues within the supply chain and sets a number of policy recommendations which could influence the European Commission. A key issue in discussions is the definition of food waste and the development of a food waste hierarchy.

The European Commission is currently working on a collective set of legislative measures on sustainability, called the 'Circular Economy Package'. The package is immensely broad and will cover anything relating to re-using, repairing, refurbishing and recycling. There is quite some controversy around this package. The previous Commission already published its legislation package, but this was found not ambitious enough by the new Commission of President Juncker. As such, the Commission has retracted the old legislative proposals and started working on a new set of legislations. Therefore, a new consultation round was

launched, to which Freshfel contributed with a position paper on the specific issues relating to food waste. It remains to be seen if the Commission will include specific legislation on food waste in its Circular Economy Package, which is supposed to be published by the end of 2015.

In a broader context, Freshfel continues to follow the work of the initiative of the Food Chain Sustainable Consumption & Production Roundtable, in order to collectively address the challenges regarding assessment methodologies and communication tools, while also exchanging best practices. A European or even an international approach is a must to avoid the proliferation of solutions and schemes which will ultimately add confusion to and cost to the chain.

Finally and following the entry into force of the trade agreement between the EU and Central America, Freshfel has also become a member of a trade and sustainable development advisory group between the two trade partners. The advisory group will serve to follow aspects related to sustainable development and approximate views between third countries suppliers and the requirements of the EU supply chain.





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Research and innovation

The European Commission places heavier emphasis on Research and Innovation (R&I). The Horizon 2020 programme is one of the most ambitious efforts to invest in R&I with an 80 billion budget available for funding during the period 2014-2020. In addition, the Commission also launched the European Innovation Partnerships (EIPs), including one on agriculture (EIP-AGRI).

In 2014, Freshfel adjusted its structure to facilitate the coordination of Freshfel in research and innovation projects with some of its members. The tool is now available for future action. In the meantime, the Freshfel secretariat already embarked in two new programmes under the Horizon 2020. The role of Freshfel is to facilitate the dissemination of the findings of the projects. The projects are:

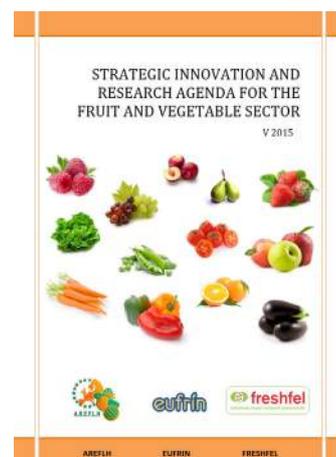


1. **FRESH-DEMO** project aiming to combine an innovative ultrasonic humidification technology with natural sanitizers. The objective is to preserve quality and freshness of fruits and vegetables along the entire post-harvest supply chain and contribute to food waste reduction. It is a two year project which started in March 2015



2. **EuroMix** project aiming at reviewing the situation of multi-residues and the impact assessment of those in the regulatory process. Indeed, every day, we are exposed to multiple chemicals by several routes of exposure: diet, inhalation and dermal contact. These chemicals may exert toxic effects and therefore risk assessment by evaluation of exposure and toxicity is necessary to monitor and control possible adverse effects on human health. Until recently, risk assessment is mostly performed separately for each chemical, considering only a single route of exposure. However, this simplified risk assessment does not take into account the effect that chemicals may have on each other and their effect on the target organ, such as synergistic effects of certain chemicals with a particular toxic effect, in case of co-exposure. Therefore, there is a need to address combined exposure to mixtures of chemicals and their combined risks as set out in EU Regulation. This will be main task of this project in the next 4 years after the kick-off meeting last spring 2015.

Next to the projects, Freshfel Europe also joined forces since 2014 with AREFLH and EUFRIN in a Task Force which identifies the priorities for the fruit and vegetables supply chain. This cooperation has already led to the development of a strategic innovation and research agenda for the fruit and vegetable sector. This agenda should be used as a roadmap in H2020 projects and to help the Commission define priorities for future research in the field. The Task Force already welcomed that Commission took into account the fruit and vegetables priorities in the drafting of its upcoming annual work plan priorities (2016-2017). The Task Force will also be a communication platform representing the fruit and vegetables sector with the services of the European Commission and could be a catalyst for the coordination of future programmes.





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OUR BRANDS:



Promotion, nutrition and health

Promotion of Agricultural Products

A new policy for information measures and promotional programmes for agricultural products in the internal market and third countries has been agreed upon by the Council and European Parliament at the end of 2014. The new Regulation 1144/2014 will provide a larger budget and a highest rate of EU co-financing. It should also reinforce the implementation of pan-European projects. Nevertheless, many hurdles remain to be addressed to maximise the benefit of the new legislation. The discussion of the delegated and implementing acts as well as the annual work programme has shown some of the pending difficulties. Freshfel remains indeed concerned on the following aspects:

- | The extension of the list of eligible products, in particular for those less healthy or for those which are rather to be considered as agro-food products and not agriculture products.
- | The unbalance between the financing of single programmes versus multi-programme in the 2016 annual work plan, a decision contrasting with call of the Commission to the sectors to enhance multi-programmes
- | The role and functioning of the new Executive Agency: Consumers, Health and Food Executive Agency (CHAFEA)
- | The limited visibility of origin of products and brands
- | Several administrative aspects such as the financial statement certificate and the indicators of assessment of the impact of programmes
- | The fragmentation of priorities for third countries programmes, which does not reflect current working practices in the sector to be represented in global trade fairs in different places around the world, namely at PMA, Moscow, Dubai, Hong Kong.
- | The contradictory messages of the Commission recommending the sector to move towards multi programmes, but favouring single programmes in the draft annual work plan

The fruit and vegetables sector is and should remain one of the main beneficiary of this EU policy. Freshfel will continue to closely monitor the phasing in of the new rules and the annual work programme for the benefit of the sector.

As this report was being printed, and following concerns of several agricultural sectors as a consequences of the Russian embargoes and poor market conditions in the EU, the Commission agreed to further increase the promotion budget by 30 million €. This envelope should be accessible to all the sectors, including to the fruit and vegetables sector, by far the most affected by the Russian ban.



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Promotion, nutrition and health

School Fruit and Vegetables Scheme

The school fruit and vegetables scheme remains an important tool to educate the children, tomorrow's consumers. In the last year, Freshfel

- | Welcomed the CAP reform decision to increase of the budget to 150 million EUR (from 90 million EUR) including an increase on the EU co-financing rate for the accompanying measures.
- | Reviewed with scepticism the European Commission proposal to the Council and Parliament aiming at bringing together under a joint framework two currently separate school schemes: The School Fruit Scheme and the School Milk Scheme. In this process, Freshfel advocated for the continuity and the specificity of the fruit and vegetables school scheme.



The main concern of Freshfel was however relating to the Commission work programme 2015, calling for an (new) evaluation of the school schemes. The Commission took this opportunity to call the Council and Parliament to suspend in the meantime the legislative process on the joint framework for the school schemes. This surprising initiative to evaluate the scheme for subsidiarity, proportionality and better regulation was immediately strongly condemned by an impressive coalition of 12 representatives Associations and NGO, condemning the Commission initiative and calling to "save the school fruit scheme, as better regulation cannot go against the wellbeing of European children. The outcome of the consultation and evaluation led to a clear call to maintain and even improve the fruit and vegetables scheme. This however still seems not to have fully convince Commission first vice president. The key elements supporting to maintain the SFS include:

- | the alarming trends of overweight and obese children across Europe and the significant impact for social security for national budgets
- | the fall of consumption of fruit and vegetables across Europe, requiring that no stone should remain unturned to reverse this situation
- | the dramatic impact of removing the SFS for European consumers, for the agricultural sector and for the social protection and healthcare budget
- | the incoherence of the Commission initiative with the commitments enshrined in the TFEU treaty (Art 168) , that the Commission itself is called to protect and make sure that it is respected
- | the minimal cost of the scheme for the CAP (0,25% of the CAP budget) compared to the multiple return for the growers and the fruit and vegetable sector, lately severely affected by the Russian embargo



Promotion, nutrition and health

Freshfel Promotion, Communication & Image Committee

The Freshfel Committee on Promotion, Communication and Image has continued to follow the various regulatory and non-regulatory developments relating to promotion, nutrition and health. It is also a unique place to share best practices.

In line with the recommendation of a SWOT analysis conducted by this Committee in May 2014, Freshfel is now considering to conduct a pan-European research to address a lack of understanding on the motivation of consumers in regard to fruit and vegetables. Plans are therefore to conduct a pan-European, industry-led, landmark research project dedicated to determining the primary motivators and inhibitors to fresh produce consumption. It would therefore be conducted by psychologists rather than by market researchers. It is expected that the project could be launched prior to the end of 2015, once the necessary financial support for such an ambitious and industry led project will be secured.

Nutrition and Health Claims

In the framework of the current legislation on nutrition and health claims made on food (Regulation (EC) No 1924/2006), Freshfel continues to evaluate the specifics of our sector in regard to the complex legislation regarding the use of nutrition and health claims on fresh produce. Freshfel has raised the Commission's attention on repeated occasion to the fact that, despite well-known international recommendations (i.e. WHO minimum intake recommendation of 400 g/capita/day). Nowadays there is not an EU consensual general advice on the (non-specific) benefits of consuming fresh fruit and vegetables at the European level. European consumers are therefore not getting all relevant information on the importance of consuming fresh produce for their wellbeing. It is Freshfel's believe that if we want consumers to be informed properly of the importance of fresh produce consumption, it is of the utmost importance to set up without further delay a message (or number of messages) for the attention of the consumers that would underline the health benefits of a diet rich in fresh fruit and vegetables. These messages to be pushed by public authorities and endorsed by the scientific and medical communities. It should be made available for the use by our sector for communication and information to the consumers at large without any restrictions.

When Commissioner Vytenis Andriukaitis came into function, Freshfel reiterated action points that should be prioritized by the European Commission, namely:

- | the need to improve citizens awareness on the positive health (and sustainable) aspects of fresh produce consumption
- | the urgency for the Commission to define healthy diet and nutrition recommendations with specific targets to increase fruit and vegetables consumption
- | the benefit of providing nutritional guidelines to health professionals, build on the first steps taken by WHO developing an European nutrient profiling model
- | the necessity of encouraging the consumption of fruit and vegetables through public information on promotion
- | secure the Treaty objective that health will be one of the corner stone of all EU policies
- | build policies to increase accessibility and availability of fresh fruit and vegetables for all the population but also and with a particular emphasis towards low income population
- | use economic and fiscal tools to incentivise healthier food environments and choices



Promotion, nutrition and health

All these aspects were also the basis of the Freshfel position paper elaborated for the Second International Conference on Nutrition (ICN2), which took place in November 2014 in Rome, under the auspices of FAO and WHO as well as during the EGEA conference in June 2015 in Milan. EGEA is a unique network of scientists which advocate for the health benefits of fruit and vegetables consumption. It is organized by Aprifel, under the leadership of its scientific director Saida Barnat, who is also Freshfel Board member (www.egeaconference.com).

European Platform for Action on Diet, Physical Activity and Health

Freshfel is since 2005 an active member of the European Platform for Action on Diet, Physical Activity and Health. It profiles there fresh produce as one of the solutions to address the alarming growing rate of obesity and related illnesses. The main purpose of the platform is to conduct open and informal discussions to examine ways of achieving binding commitments aimed at tackling the obesity epidemic and at addressing diet-related chronic diseases such as cardiovascular disease. Freshfel's current active commitments are the Fresh Times, the Consumption Monitor and the support to the EU School Fruit Scheme (SFS). This last commitment entails a unique collaboration between the public health sector (EPHA – European Public Health Alliance, and EHN – European Heart Network) and the fresh fruit and vegetables sector (Freshfel), which has been established to provide Platform members and the Directorate-General for Health of the European Commission with information on their work in relation to implementing the EU SFS.



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Repositioning fresh produce trade



The last year was heavily impacted by the Russian embargo, as the EU used to ship close to 40% of its export to the Russian Federation. The latest statistics indicate that the total export volume only decreased by 2%, while the value of exports dropped by close to 20%. The collapse of the Russian economy is also representing a major challenge for other suppliers than the EU exporters. The evolution of the €/USD exchange rate led however to an improved competitiveness of EU fresh produce internationally, while decreasing the attractiveness of the EU market for several suppliers.

As a result of this rapidly changing environment, Freshfel dedicated a lot of work to secure a new export trade strategy. It helped the sector to diversify its markets outlets, addressing as well the market access challenges. SPS barriers remain one of the most complex to remedy and challenging them is often time consuming and costly.

Freshfel has reviewed the main developments of imports and exports with its members at Freshfel's traditional trade meeting during Fruit Logistica. This meeting gathers more than 50 members.

Coping with the Russian embargoes

Following the announcement of the Russian embargo, the EU and exporters responded quickly to address this situation. On the one hand, several regulations were introduced to limit the impact of the trade ban for our sector. Measures were adopted to either support growers' decisions of non-harvesting or green harvesting, or to facilitate withdrawal or free distribution of produce. Regulations 913/2014 for peaches and nectarines and the Regulations 932/2014, 1031/2014 and 1371/2014 for fresh produce granted a total support of 163 million € to the sector, covering close to 800.000 T. As we entered in the second year of the embargo, the EU prolonged the scheme through the Commission delegated Regulation 2015/1369 covering 836.520 T divided among the different Members states and by groups of products. Freshfel will follow the impact of these measures and its good implementation during this second year. Besides, Freshfel works closely with the Commission to secure promotion tools and also address market access issues on alternative destinations. The rest of the response were provided by the dynamisms and skills of EU producers and exporters to diversify markets and open new opportunities. The weakening of the € greatly assisted in this process.



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Repositioning fresh produce trade

Bilateral trade negotiations

Import and export conditions are expected to be improved as a result of the finalisation of several bilateral free trade agreements between the EU and third countries.

The bilateral free trade agreements with many Latin American trade partners came into force and were recently extended with Ecuador. For this matter, the coming into force of the agreement will still take a few months before releasing its trade benefit (eg on bananas). Other agreements are now also in force with neighbouring countries such as Ukraine, Moldova or Georgia. In the near future, new developments might be expected through the revision of existing FTA (Chile, Mexico, and others), the possible progress in TTIP, the transatlantic negotiation with the USA or possible progress in talks with India, Mercosur or some South East Asian countries.

In all these negotiations, it is crucial that new opportunities will not be hampered by non-tariff barriers. Freshfel remained particularly active in assisting sorting out some of the major hurdles with the USA (apples and pears system approach protocol), Canada (Polish apples and Belgian Pears) while also supporting recent progress to facilitate EU exports to Brazil, India, Vietnam, South Africa, Mexico or Chile.

Separately, Freshfel also urged the EU to take actions in regard to the logistics constraints introduced in India and Indonesia, which restricted the access to one single port. It further voiced concerns against Indonesia which also operates a restrictive import regime based on quotas for fresh produce. Upon leadership of New Zealand and USA, supported by several countries, including the EU, this scheme is currently being challenged. Besides, Freshfel continues to raise attention on the limited access for EU fresh produce in Turkey, one of the country which is most benefiting of the embargo in the Russian market for EU fresh produce. High tariff upon imports, but also the granting of indirect support to its exporters through a complex and not notified (to WTO) scheme are some of the instruments that are detrimental for the EU fresh produce sector.

Together with DG TRADE and DG SANTE, Freshfel continues to evaluate how to improve the overall market access scheme, challenging pre clearance systems and also looking how to enhance harmonization of rules through the IPPC on issues such as cold treatment.

On the import side, Freshfel was particularly active in addressing the compliance with the food safety regulatory and non-regulatory requirements as well as with the new emerging need to comply with EU plant health legislation. Freshfel also provided the necessary information in regard to the impact of the new General Scheme of Preferences, which entailed for some suppliers a significant rise of their import duties into the EU.





In loving memory of
André Feldhof



André passed away quite suddenly on the 10th of July. Up until that day we have had the pleasure of working together with a great person, in his profession as well as his kind personality.

André joined the Freshfel team in April 2013. He quickly integrated as a member of the Freshfel Team. André's professional work was always highly appreciated here internally, but also externally with the members and other business contacts. His kindness and dedication were known by many.

He will be deeply missed by everyone who happened to know him, work or collaborate with him.



Freshfel activities in pictures



Egle Eimontaite
(Food Quality Advisor)



Raquel Izquierdo de Santiago
(Director Food Law, Nutrition and Health)



Daphne van Doorn
(Communications and Agriculture Policy Advisor)



Philippe Binard
(General Delegate)



Nelli Hajdu
(Communications and Trade Policy Advisor)



Linda Bloomfield
(Membership and Event Manager)



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Moving ahead

Freshfel priorities 2015-2016

1. **Encourage competitiveness of European fruit and vegetables production:** A great variety and diversity of fruit and vegetables should be made available to consumers by a strong and competitive European production. The CAP instruments as well as other policy instruments (plant and food safety) should enhance the production of fruit and vegetables in the EU. Increased production will also increase jobs creating a win-win-win situation for agriculture, employment and health. While fruits and vegetables are the foundation for a healthy diet, their detrimental impact in terms of carbon footprint, water footprint and ecological footprint is the lowest among all foodstuffs. This should be also highlighted.
2. **Food and plant safety:** Several dossiers are on the table regarding active substances, minor use, MRL, but also sanitizers and contaminants. Unclear regulatory aspects need to be addressed to provide to the sector confidence in the legislation and to get the deserved confidence of consumers. Plant security should be guaranteed, in particular in the frame of the current plant health reform.
3. **Research and innovation:** The sector should build upon a strategic research and innovation agenda elaborated by AREFLH, EUFRIN and FRESHFEL to position itself in the new Horizon 2020 and the European Innovation Partnership for agricultural productivity and sustainability.
4. **Enhance trade:** The Russian embargo is redesigning the trade agenda. While the sector was already in a process of diversification, this now needs to be accelerated. Non-tariff barriers need to be challenged vigorously in FTA as well as excessive protocols imposed by third countries which often have a less burdensome condition to access the EU market. More reciprocity is demanded, while Europe should also remain attractive market in a more global environment.
5. **Securing efficient health and nutrition policy:** This would imply defining healthy diet and set nutrition recommendations with specific targets to increase fruit and vegetable consumption, develop nutritional guidelines for health professionals so that coherent nutrition advice and support is given at large. The EU regulation on nutritional and health claims should be adjusted to facilitate claims on fruit and vegetables.
6. **Stimulating consumption:** The reform of the EU promotion policy for agricultural products should be encouraged and come into force at the earliest possible. Policy should also consider improving availability and consumers' access to fresh produce, including using economic and fiscal tools. Increased efforts should be developed towards low-income communities such as the use of fruit and vegetables vouchers. Avoid the merger of the European School Fruit Scheme (SFS) with any other scheme in the absence of scientific evidence proving the interest of such a merger would preserve the specificity of our sector.

All the above should contribute to build a stronger and more competitive sector to remedy the declining consumption trends

FRESHFEL MEMBERS AND ASSOCIATED MEMBERS



ANDRETTA Stuttgart



ANEEFEL



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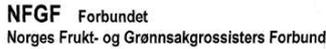
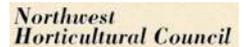


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