



Freshfel Europe Activity Report

2018



This Activity Report provides a general overview about Freshfel Europe, its organisation and structure, as well as topics that are pertinent to Freshfel Europe's members.

This Activity Report is published on an annual basis in advance of the Annual Event.
This version covers Freshfel Europe's main activities between June 2017 and June 2018.

This work would not have been possible without the leadership of the Freshfel Europe Board, as well as the active support of all the members and associated members throughout the year. Finally, the support of sponsors has been fundamental in making possible the publication of this annual report.



Not yet a Freshfel member?

Freshfel Europe's resources are exclusively resulting from membership fees.

A strong organisation can only be built by gaining the support of all stakeholders in the fresh produce supply chain.

Freshfel Europe thanks its members and associated members for their continued support!

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



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FOREWORD FROM THE PRESIDENT



The release of this 2018 Activity Report coincides with the finalization of my second two year term as President of Freshfel Europe. The report will be presented on the occasion of the Annual General Assembly taking place in Hamburg, Germany on 8 June 2018.

This Activity Report provides a useful snap overview of Freshfel Europe, its structure and the diversity of topics that Freshfel Europe is engaged in for the benefit of the general interest of the fresh produce supply chain.

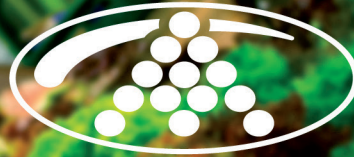
More than ever before our fresh produce business is at a crossroads. It needs to respond to a rapidly evolving environment, adapting its models to cope with sophisticated production and trade requirements, impacts on supply and demand due to climatic events and mixed consumer signals. The sector needs to reconcile both local and global consumer aspirations, while also coping with seasonal desires and expectations to get year round availability. The sector should secure traditional purchasing habits and also adapt sales patterns to increasingly connected customers. The fresh produce sector also needs to adjust supply to ever more fragmented consumer eating patterns and habits, as well as segmented attitudes towards freshness, convenience, vegan and vegetarian diets and other societal expectations. Production and business developments are to be built within the modernization of the CAP and new priorities of the EU Multi Annual Financial Framework.

Besides this, trade is operating in ever more troubled waters. The ongoing sequelae of the Russian embargo, market closures in North Africa and the uncertainties of Brexit are exposing fresh produce exports to additional pressures. Unilateral sanctions, such as those planned by the USA, question the WTO model. To enhance trade and reinforce the EU's role as the leading global trade actor, the EU has multiplied its negotiations and aims at signing several bilateral modernized Free Trade Agreements. EU imports are rising again, but need to cope with increasingly more complex rules on food and plant safety, which govern EU production and trade patterns and match societal concerns beyond the regulatory environment.

In this hectic backdrop, Freshfel Europe has played an important role to approximate views across the chain and highlight the sector's common ground and the specificity of fresh produce in a complex and competitive environment.

After four years, I am proud to hand over a professional and highly valued organization, ready to address future challenges for the benefit of our sector. Freshfel Europe is well positioned to build a favorable business environment for the fresh produce sector on the strong health and sustainable assets of the sector to boost consumption. This will only be possible with the ongoing support of the membership.

Luc Clerx
President of Freshfel Europe



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



About Freshfel Europe

WHO WE ARE

Freshfel Europe, the European Fresh Produce Association, is a unique forum for the fresh fruit and vegetable supply chain in Europe and beyond. It is the single representative Association of the sector at EU level. Freshfel Europe's members are national associations, organisations and companies with an interest in the European fresh fruit and vegetable sector from across Europe along the whole supply chain, from producers to retailers to wholesalers and traders. Freshfel Europe is a non-profit association under Belgian Law and is registered in the EU Transparency Register.

**FRESHFEL
EUROPE IS
HIGHLY ACTIVE
ACROSS ALL
ASPECTS OF
THE WHOLE
SUPPLY CHAIN**

OUR STRUCTURE

Freshfel Europe is governed by a Board, including an elected President, Vice-President and Treasurer on a two-year term, who preside at an Annual General Meeting with the Association's members to decide statutory and corporate matters. Members also partake in specific Divisions and Committees covering business segments and horizontal issues relevant to the fresh produce sector respectively. The Freshfel Europe Secretariat is based in Brussels, Belgium, the heart of European policy-making.

WHAT WE DO

Freshfel Europe is in continual contact with its members and the European institutions, ensuring that the fruit and vegetable sector and its interests are well-represented and have a strong voice in Europe and globally. Alongside policy and decision-making, Freshfel Europe works to stimulate the supply of healthy and delicious products, which comply with the highest quality, safety, environmental and social requirements to the benefit of consumers.

**FRESHFEL EUROPE
ENSURES A ROBUST
& SUSTAINABLE
EU FRUIT &
VEGETABLE SECTOR**

Freshfel Europe's Mission

1. Improve the efficiency and competitiveness of the sector
2. Facilitate international trade of fresh produce
3. Assist members to comply with safety, environment and CSR standards
4. Secure a favourable environment to promote the benefits of fresh produce and share best practices
5. Position the sector towards the latest research and innovation findings
6. Stimulate consumption of fresh produce





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food chain partnership



Communicating to Members and Beyond

COMMUNICATING TO MEMBERS

The Secretariat is in contact with Freshfel Europe members on a daily basis to respond to their emerging needs and interests and to provide the latest information on policy developments. Freshfel Europe members also receive a **weekly Freshfel Newsletter** outlining policy progress and information on the Association's activities and developments in the sector. To inform members on sector news, Freshfel Europe publishes the **Freshfel Press Review**, a weekly online paper covering EU and international fresh produce news.

COMMUNICATING TO STAKEHOLDERS

Freshfel Europe addresses policy makers via publication of **press releases** and **position papers** communicating the sector's priorities. Stakeholders within the fresh fruit and vegetable sector are informed about Freshfel Europe's activities through Freshfel Europe's **Headlines**, a bimonthly publication outlining Freshfel Europe's key activities and positions. The **Fresh Times** is also published bimonthly, and gives best practice examples of the sector's initiatives promoting the consumption of fresh fruit and vegetables.

COMMUNICATING TO EUROPE AND BEYOND

The Freshfel Europe website www.freshfel.org provides information about Freshfel Europe and its functioning, as well as the Association's latest publications and press releases. This is complemented by the Association's **Twitter account**, **Facebook page** and **LinkedIn page** using **@Freshfel**, which are kept updated with Freshfel Europe's activities.

Freshfel Europe hosts a range of websites providing a variety of useful information about fresh fruit and vegetables to consumers as well as about the fresh produce sector in general. These include:



www.enjoyfresh.eu



www.kidsenjoyfresh.eu



www.freshquality.eu



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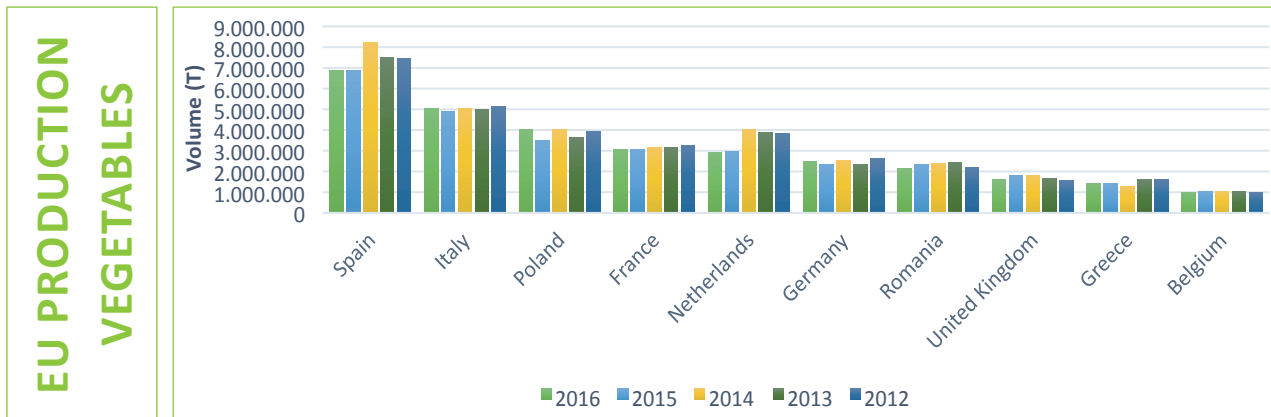
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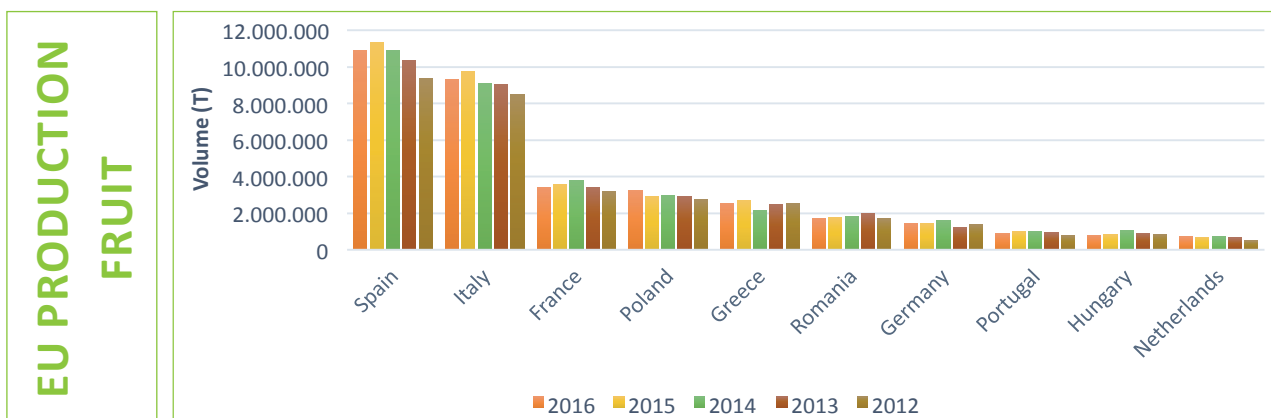


EU Fruit and Vegetable Production

- In 2016, production of EU fruit for the fresh market amounted to over 43 million tonnes, while 48.5 million tonnes of EU fresh vegetables were produced. For the top 10 EU fresh vegetable producing countries, varying situations in different countries are noticeable with some Member States increasing, then declining in production, while others have more stable production curves.



- In regards to the top 10 fresh fruit producing countries, Spain and Italy show a noticeable increase until 2015 with a slight drop in 2016, while other Member States are producing significantly less with different variations over time.

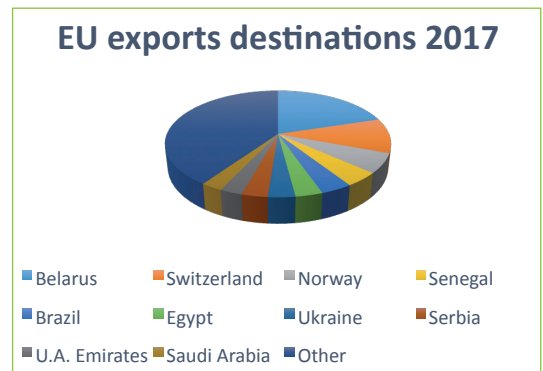
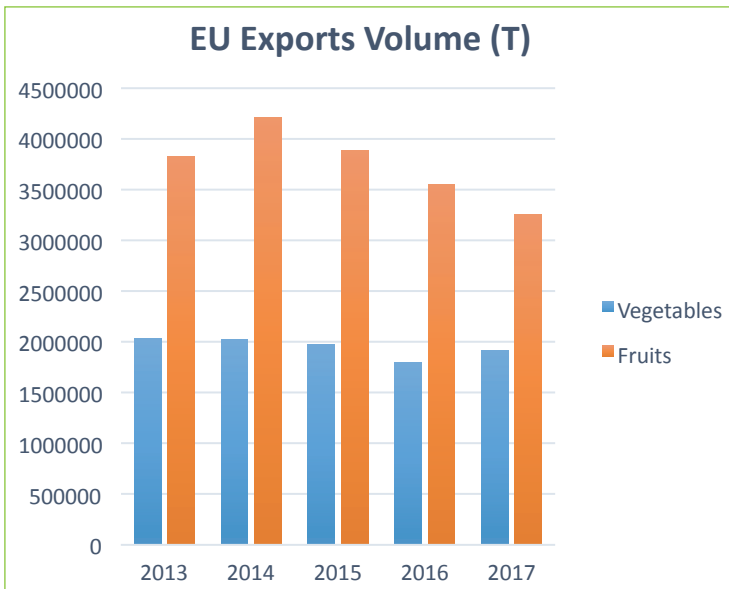


- In terms of world fruit and vegetable production, China and India, the top two producing countries, have experienced general increases in the last 5 years. With an aggregate production for fresh exceeding 90 million tonnes, the EU is ranked third, with total EU production of both fresh and processed fruit and vegetables reaching more than 125 million tonnes.

	2016	2015	2014	2013	2012
China	689.949.840,60	675.091.969,80	643.677.978,50	628.324.434,30	609.789.203,45
India	167.403.387,90	164.502.631,20	171.283.629,90	161.387.584,90	151.713.403,30
United States	41.292.330,30	41.944.888,35	44.120.536,10	43.390.009,85	44.492.087,30
Brazil	37.621.587,00	37.707.907,05	38.119.628,85	38.213.434,35	38.345.341,95
Turkey	35.192.273,05	33.714.254,45	32.327.888,30	33.262.856,40	32.402.160,55
Mexico	28.186.684,25	26.278.426,50	25.005.082,20	24.329.497,50	23.257.275,85
Iran	25.417.680,50	24.369.750,05	25.923.407,95	26.652.401,15	25.019.422,70
Indonesia	24.147.087,80	25.805.100,10	23.847.933,80	23.506.923,60	24.284.089,40
Egypt	23.964.823,35	23.236.077,05	23.163.542,10	22.180.953,00	23.238.097,65
Spain	22.175.711,05	22.815.958,70	23.540.587,45	21.874.239,00	20.495.804,00

EU EXPORTS

The struggle to recover from the 2014 Russian embargo and other new challenges in North Africa has continued, as reflected by the downward trend in export volumes, which have gradually decreased from more than 6,2 million tonnes in 2014 to less than 5,2 million in 2017 (with a total value of over 4.43 billion euros). Belarus, Switzerland and Norway remained the main destinations, whereas apples stayed at the top of the podium of export commodities, followed by onions and pears.

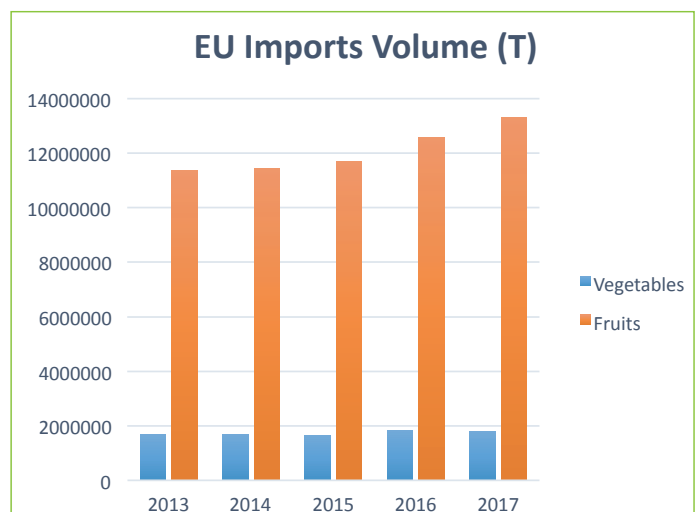


EU IMPORTS

The slow but steady upward trend in import volumes continued, mainly triggered by increases in imports of bananas and exotic fruits, reaching a total volume of over 15 million tonnes, worth more than 16,13 billion euros in 2017. Bananas, oranges, and pineapples kept their position of most imported commodities in terms of volume. The Netherlands and the UK remained the main importers, whilst banana producing countries stood out as the main EU partners (Costa Rica, Ecuador and Colombia).

TOP 5 EU importers
Netherlands
UK
Belgium
France
Italy

TOP 5 partners
Costa Rica
Ecuador
Colombia
South Africa
Morocco



La french pomme color your life



The French apple, color your life

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CAP: On the Road to Simplification and Modernization

A wide diversity of Common Agriculture Policy (CAP) instruments are relevant for the fruit and vegetables sector. Fruit and vegetable production contributes significantly to the EU agriculture value (ca. 21%), but the part of the CAP budget relating to the sector is proportionally much smaller at about 3% of the annual EU agriculture budget. CAP tools for the sector include Producers Organizations with Operational Programmes, Interbranch structure, marketing standards, entry prices, the EU School Fruit and Vegetable Scheme, and other quality aspects such as the promotion and information policy, the PGI and PDO instruments, the organic legislation, etc.

There has been an ongoing effort to simplify and harmonise the CAP since its last reform in 2013. Over the last year, these efforts have culminated in the form of the agricultural provisions of the Omnibus Regulation. This has introduced new measures such as administrative burden reduction, risk management, selection and eligibility criteria, and financial instruments. The agricultural part of the Omnibus Regulation has been applicable since January 2018, however other measures will be implemented via a series of delegated and implementing acts, to be released during 2018.

The European institutions have also started to discuss the future of the CAP and the new Multi-annual Financial Framework (MFF) covering 2021 to 2027. The new MFF budget structure will be influenced by Brexit, and budget will be re-allocated to other policies areas (eg. defence, migration, R&I, regional cohesion) to meet shifting political priorities. Consequently, the CAP budget will most likely be reduced and resources within it redistributed.

In light of this, the European Commission released a Communication on the Future of Food and Farming. In the Communication more investment in Research and Innovation was requested as well as a stronger commitment for sustainable agriculture and healthy diets, with specific mention of promotion of the consumption of fruit and vegetables. Freshfel Europe contributed to the consultation for this with a position paper in 2017.

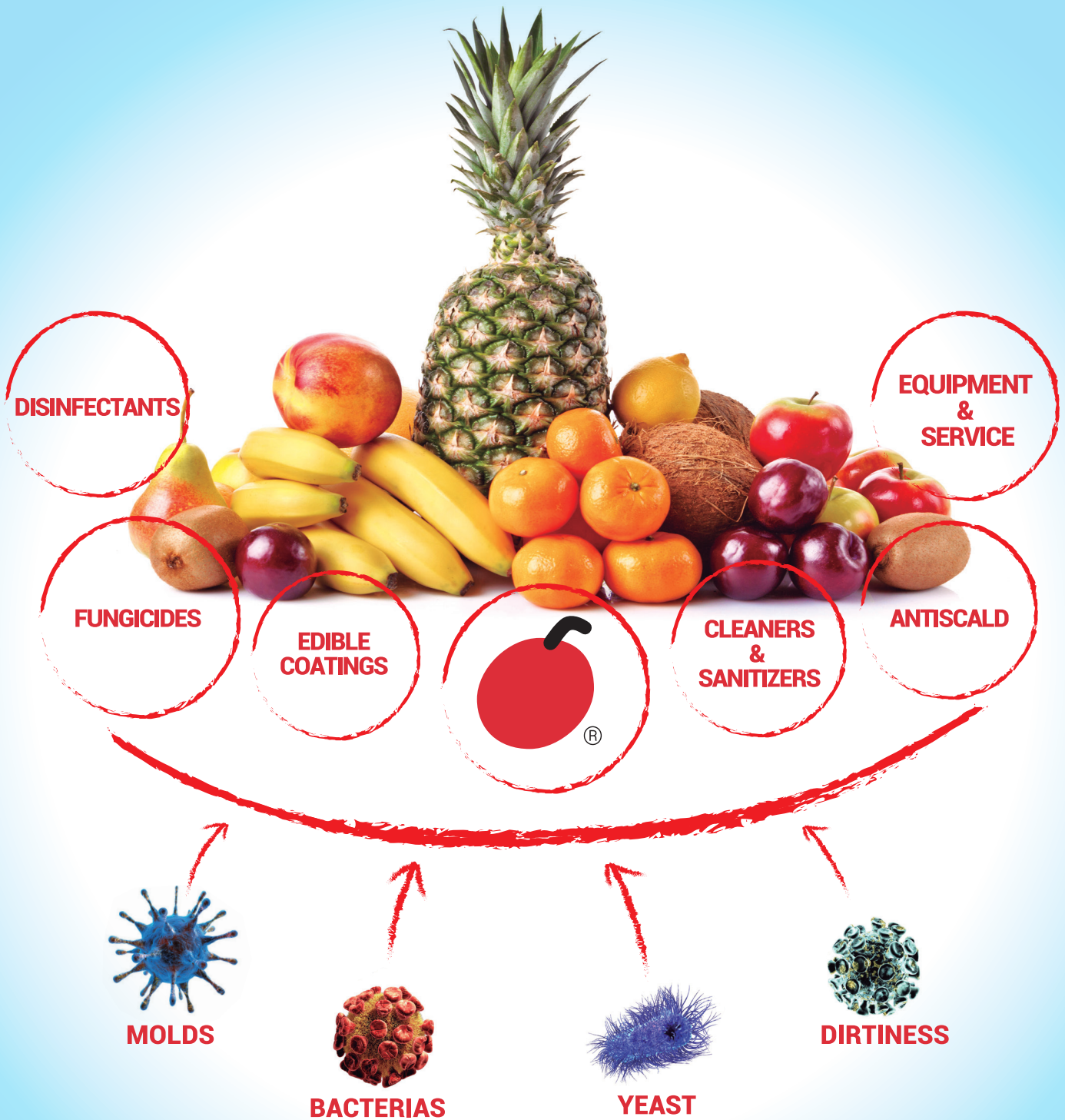
Freshfel Europe's Activities

- Representation in the European Commission's Civil Dialogue Groups (CDG), including CDGs on Fruit and Vegetables, CAP, Organic, Sustainability and Environment, representing the interests of the fruit and vegetable sector at policy level and to keep abreast of policy developments. Mr Jose Antonio Garcia, one of Freshfel Europe's Board members is currently chairing the CDG on Fruit and Vegetables.
- For the current debate on a sustainable future CAP, Freshfel Europe is joining forces with the European Heart Network (EHN) and the European Public Health Alliance (EPHA) asking for concrete mechanisms and sufficient budget to support the European Commission's Communication on The Future of Food and Farming's prominent objective of healthy sustainable diets with enhanced fruit and vegetables consumption to achieve a triple win for the economy, environment and health for European citizens.





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Towards a New Organic Legislative Framework

The Regulation (EC) No 834/2007 on organic production and labelling of organic products outlines the rules for organic production in the EU. Viewed as increasingly inconsistent with the development of production and consumption of the sector, new elements of the regulation were agreed upon by the European institutions on 28 June 2017, but leave many question open for the coming years:

1. Status for non-authorised substances: while initially keeping the status quo of a diversity of control systems across Member States, the European Commission will conduct a study 4 years after the introduction of the new legislation comparing different practices to see if there is a possibility to come to a more harmonised solution. Member States with national rules for thresholds for non-authorised substances in place can maintain them.
2. Phasing out of derogations for production in demarcated beds in greenhouses: the European Commission will execute a study 5 years after implementation to determine the status of demarcated beds and an evaluation of this cultivation method to consider if this situation can be harmonised afterwards. In the meantime, Finland, Denmark and Sweden received derogations for all greenhouses using demarcated beds for organic production, where those who were recognised by 28 June 2017 are allowed to continue organic production for 10 years after application of the regulation by derogation.
3. Organic imports: organic produce from third countries will have to be produced in full compliance with EU law, but derogations are foreseen for some regions and products depending on whether there are equivalency agreements and if an FTA is in place.
4. Certification and controls: a risk-based approach as a guiding principle was only partly considered for organic controls. Controls regimes would include annual physical on-site checks for farmers, processors, traders and importers, but with the possibility to be reduced to every two years if no non-compliance in the past three years took place.

The new law will enter into force on 1 January 2021 and for certifications of organic products, from 20 October 2017, only certificates issued by TRACES are valid. All paper certificates issued before that date, but applied after are also still valid.

Freshfel Europe's Activities

- In light of the negotiations on the new text regarding rules for organic production and labelling, Freshfel Europe wrote a position paper regarding organic production and sales in pots, and the inconsistencies of those rules in different Member States and argued for clear provisions in the new agreement, especially when it comes to the definition of in-soil.
- Freshfel Europe is currently monitoring the new draft agreement and its different stages of approval in the European Parliament and Council before it enters into force.
- Freshfel Europe is following the progress of the introduction of electronic certification for organic products.



TOWARDS A MORE Sustainable Future



Consumers' concerns about natural resources are growing. Research has found that consumers prefer paper-based packaging because it's more sustainable.

Companies should respond and transition towards a sustainable supply chain, without making concessions to the strength and versatility of the packaging material.

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Very hygienic and fit for purpose, corrugated packaging also prevents food waste. In particular the thoroughly tested stackable and printable trays with the European CFQ label, reduce damage, contamination and spoilage, extending the shelf life of fresh produce. Packaging with the CFQ label is an ideal fit for both the produce it's carrying and the supply chain.

Increasing the use of corrugated packaging should be a clear priority for companies looking to improve consumer satisfaction, better sustainability credentials and, ultimately, higher profitability.

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Sustainability in a Circular Economy

With the European Commission's commitment in 2016 to implement the UN's 2030 Sustainable Development Goals, sustainability has emerged as a leading theme in policy developments across the European Commission's priorities from agriculture, to health, to trade. Freshfel Europe with its members keeps abreast of this development and adapts business models to cope with the diversity of issues behind this concept.

On the 7th December 2017, Freshfel Europe held its second annual Sustainability Working Group with members. Best practices in production and trade were shared amongst members to benefit from each others' expertise in implementing sustainable business initiatives. The state of play of social compliance, new CSR reporting obligations published under Directive 2014/95/EU as well as progress in EU action on food loss and food waste were discussed.

FRESHFEL EUROPE WORKING GROUP ON SUSTAINABILITY

EU PLATFORM ON FOOD LOSSES AND FOOD WASTE

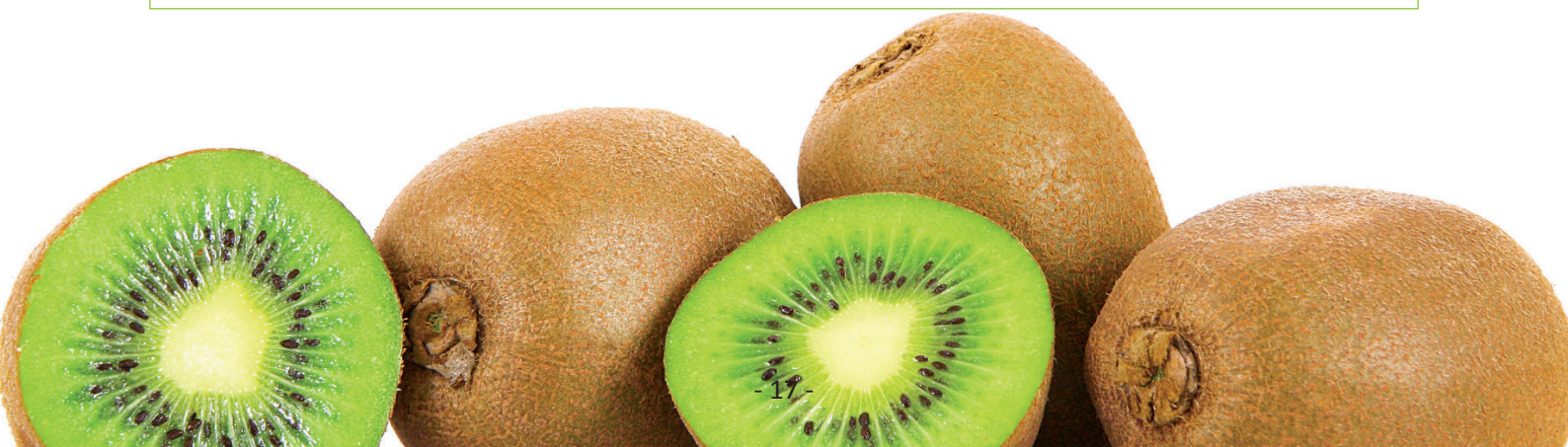
Freshfel Europe is a member of the EU Platform on Food Losses and Food Waste, which was established in 2016 as a Platform of dialogue between stakeholders, Member States and the European Commission to prevent food loss and food waste. Freshfel Europe provides its members with updates on the Platform discussions, such as implications for the sector on measuring food loss and waste, food donation guidelines and best practice initiatives.

Freshfel Europe works in collaboration with other stakeholders at EU level to ensure that sustainability is present in all aspects of the supply chain. This includes being an Observer Member of coolingEU, a forum promoting a more efficient and cleaner cooling supply across Europe, and taking part in the SUSFANS project's stakeholder workshops, where alignment in the EU of nutritional health and food production is being identified.

COOPERATION ON SUSTAINABILITY ISSUES

Freshfel Europe's Activities

- Dialogue on pertinent sustainability topics and sharing of best practices among members at the annual Freshfel Europe Sustainability Working Group, with the next meeting planned at the end of 2018.
- Continued active participation in the EU Platform on Food Losses and Food Waste in consultation with members.
- Involvement in sustainability projects and research, including coolingEU and SUSFANS.



FRESH PRODUCE CENTRE

Louis Pasteurlaan 6, 2719 EE Zoetermeer, the Netherlands

www.freshproducecentre.nl

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 several key fields of knowledge:

- **Food safety and Quality**
- **Market intelligence and Statistics**
- **Opening new markets**
- **Labour**
- **Logistics and ICT**
- **Sustainability**
- **Nutrition and Health**

Fresh Produce Centre supports member companies in international trade, access to European markets and informs them with data about food safety, phytosanitary issues, customs and pre-competitive market intelligence.

A New Basis for the Functioning of the Food Chain

Increased attention on sustainability has led to questions about the functioning of the food supply chain and the sustainability of relations between different actors. The discussion has specifically focussed on relationships between small farmers and big retailers, and a specific number of trading practices that were established as Unfair Trading Practices (UTP). The debate about these UTPs gained momentum in 2017 after the publication of the Agricultural Markets Task Force report ('Veerman Report') in November 2016, which presented seven recommendations to improve the position of farmers in the supply chain. Three recommendations in particular have led to the European Commission taking targeted action:

1. Improve market transparency
2. Enhance cooperation among farmers
3. Tackle UTPs through framework legislation

In light of this, the European Commission has held several consultation sessions, consulting not only individual experts, but also launching several public consultations during the summer and autumn of 2017 that asked the opinion of stakeholders on the three topics. Market transparency will be dealt with in the second semester of 2018, and cooperation among farmers has been treated in the Omnibus Regulation. However, tackling UTPs has been the subject of intense public interest and consequently has resulted in a proposal for a Directive, published in April 2018 for a new regulatory environment between SMEs and other operators.

Freshfel Europe's Activities

- Freshfel Europe published a position paper in response to the Public Consultation on UTPs setting out elements that influence and determine the fresh fruit and vegetable supply chain and set it apart from other commodities.
- Visits with the umbrella association CELCAA to different European Commission services, where the role of traders in the supply chain was highlighted, given that the debate often focussed solely on farmer-retailer relationships.
- Freshfel Europe sent its delegate to present the specificities of the fresh fruit and vegetable supply chain at a CELCAA workshop on 22 February 2018, where the role of traders and other actors, which are often forgotten in the debate, were brought to attention.





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Prioritising F&V in Research and Innovation

Research and Innovation is increasingly in the spotlight on the Brussels' policy making scene. The current Horizon 2020 funding programme is the EU largest funding programme, with a total budget of 80 billion euros, to be spent over a period of 7 years from 2014 to 2020.

An important focus within Horizon 2020 is the involvement of actors from the sector, the so-called 'multi-actor approach'. With this in mind, the fruit and vegetables sector created a Task Force in 2014, connecting A.R.E.F.L.H., fruit and vegetable research centres, with Freshfel Europe as the sector representative. In a Strategic Innovation and Research Agenda (SIRA), the Task Force identified the main research priorities for the sector. The SIRA has been updated and distributed to the European Commission and fed into the Work Programme 2016-2017 and 2018-2020 with more representation of the whole supply chain in the presented calls for proposals and increased attention paid to health and sustainability of food production.



Freshfel Europe's Activities

- On 23 January 2018, the Task Force organised a conference on the sector's research priorities. Representatives from the European Commission, the European Parliament, research institutes, and the sector itself discussed the sector's involvement in the Horizon 2020 funding programme, and the way forward towards the future funding programme Framework Programme 9 (FP9).
- Freshfel Europe responded to the Public Consultation on the future FP9 by stressing the need for agriculture-related research and the necessity to turn this research into practical innovations. Additionally, the paper highlighted the need for more industry involvement and the difficulty to bring sector-specific needs to the forefront.
- Throughout the year, the Task Force coordinated with each other continuously through teleconferences and physical meetings. On behalf of the Task Force, Freshfel Europe sent policy recommendations regarding the position of fruit and vegetables in agricultural research to the European Commission.





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Freshfel Europe's Participation in R&I Projects

- Freshfel Europe acts as a disseminator of the research outcomes in the projects it is involved in. As the Fresh Demo project concluded in 2017, Freshfel Europe remains involved in two projects: EUFRUIT and EuroMix. For the latest call for proposals in February 2018, the main opportunities for the sector are resulting from the following key priority headings: 'Future Proofing our Plants', 'Towards Healthier and Sustainable Food', and 'New and Emerging Risks to Plant Health'.

EuroMix

(Project ID: 633172): www.euromixproject.eu

- Aims at reviewing the situation of multi-residues and the impact assessment of those in the regulatory process. Until recently, risk assessment was 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.
- Will deliver a mixture test strategy and test instruments using novel techniques as recently proposed by the Joint Research Centre (JRC) of the European Commission. The tests will result in data needed for refining future risk assessment of mixtures.
- Aspires to provide information for future risk management decisions on the safety of chemicals in mixtures.
- Kicked off in May 2015 and finishes in May 2019.



EUFRUIT

(Project ID: 696337): <http://kp.eufrin.org/>

- Aims to set up a unique thematic European Fruit Network where research institutes and the European representative organisations of the fresh fruit sector are joining forces.
- Wants to avoid that the knowledge gathered through research is wasted as it is not properly shared throughout Europe.
- Launched a publicly accessible Knowledge Platform on which all research outcomes and dissemination efforts within the scope of the project are published.
- Was a concrete result of the efforts of A.R.E.F.L.H and Freshfel Europe in collaboration with EUFRIN to bring together the fruit sector and their research institutes.
- Kicked off in March 2016 and runs until March 2019.
- Final conference will be held in Bolzano at Interpoma in 2018.





A passion for fresh fruit

Direct and efficient supply from the grower to the retail trade

Global Fruit Point (GFP)

concentrates on direct sourcing of conventional and organic fruit from overseas.

Our main import products include deciduous, citrus, berries, avocados, lychees, mangoes, melons, pineapples and pomegranates.

Our handling structures in Rotterdam and Hamburg guarantee smooth logistics all over Europe as well as highest quality and food safety standards.



GLOBAL FRUIT POINT
A Passion for Fruit

Contact us:

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- **Netherlands** - Rotterdam (quality control)

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email: info@frupo.de



Plant Health: Gaining Momentum

Over the last few years plant health has been high on the European policy agenda. This is a result of the debate around the reform of the existing legislation (Directive 2000/29/EC) moving into the new policy (Regulation 2016/2031) that will enter into force on 14 December 2019. Besides this, other developments are increasingly impacting plant safety such as climate change, the consequences of outbreaks for crops, reduced tools to mitigate diseases and pests, and the evolution of pests and their spread around the world. At EU level, the Europhyt monitoring is becoming an important tool to check compliance. In the plant health debate, the lack of consistencies among different policies often create an uneven playing field, in addition to a lack of reciprocity in market access by several EU trading partners, who have maintained a closed system with complex, timely and costly market access rules that contrast with the EU system.

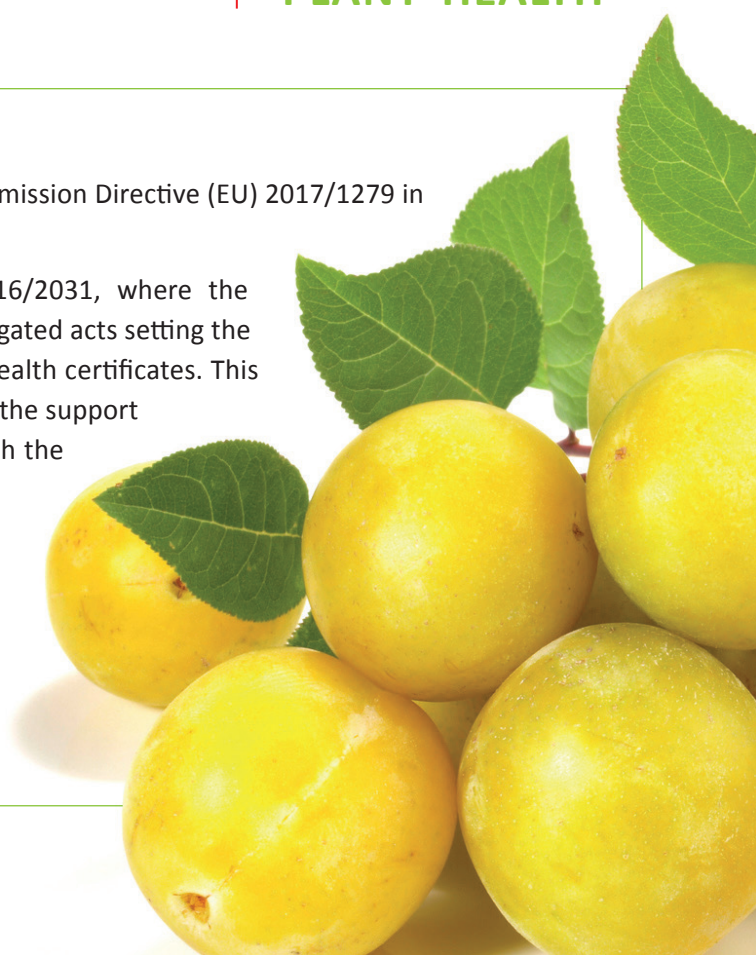
Accordingly, plant health issues are among Freshfel Europe's top priorities to provide appropriate balance between the need to protect crops from harmful organisms and facilitate safe trade. Within Freshfel Europe, policy direction is coordinated by the Board and a small task force of experts with different perspectives from Freshfel Europe's membership. Moreover, the topic is now also permanently on the agenda of Freshfel Europe's food and plant safety committee. The main drivers of Freshfel Europe's policy are:

- European production is of utmost importance and needs to be adequately protected from the threat and potential negative consequences of the introduction of new pests.
- Trade, whenever safe and pest/disease free, needs to be secured and guaranteed without any unnecessary burden that would endanger freedom of trade.
- Freshfel Europe plays a role to approximate perspectives and be part of solutions that would govern production and trade of fruit and vegetables in regard to plant health.

FRESHFEL EUROPE BOARD'S UNDISPUTED GUIDING PRINCIPLES ON PLANT HEALTH

Freshfel Europe's Activities

- Adapting to the new requirement of European Commission Directive (EU) 2017/1279 in regard to CBS, FCM and Citrus canker.
- Preparing the new rules of Regulation (EU) 2016/2031, where the European Commission is preparing in 2018 the delegated acts setting the provisions in regard to high risks plants and plant health certificates. This complex procedure will need to be elaborated with the support of the sector and Freshfel Europe works closely with the European Commission and its members.
- Addressing hotspots identified by Europhyt notifications.
- Involvement in the E-phyto project, an international public private project with the support of WTO-IPPC, for setting the basis of electronic phytosanitary certifications.





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for a healthier future

Confidence in Quality and Safety of Fresh Produce

After years of unchanged rules, the European Commission re-opened discussions on marketing standards. Relevant to this debate is the simplification of EU legislation, its alignment with international UNECE standards, the ongoing debate on food waste, the evolving trade practice with diversification of market outlets and other aspects of labelling. A coherence between marketing standards' rules on labelling and those of the European legislation on food information to consumers is important. Freshfel Europe has been a catalyst for the sector's expectations in regard to the re-evaluation of European marketing standards.

Marketing standards are an important reference tool for the sector, but their provisions need to constantly develop with the evolution of business practices to match the requirements of day-to-day reality. Freshfel Europe is closely liaising with its members and the European Commission to secure the most practical solutions to ensure this.

**QUALITY
REQUIREMENTS
IN AN EVOLVING
ENVIRONMENT:
MARKETING
STANDARDS
AND LABELLING**

**CONSUMER
CONFIDENCE
THROUGH FOOD
SAFETY
COMMITMENTS**

Besides the undisputed healthy assets of fresh fruit and vegetables, a number of issues need to be closely monitored to secure consumer confidence. Close monitoring of the legislation, in particular the need for full compliance with the complex EU requirements on active substances and maximum residue levels, microbiological risks, food additives, biocidal products, fertilizers, sanitizers and contaminants, is crucial. This is only the starting point given current societal expectations for additional requirements.

Freshfel Europe's Activities

- All matters related to food safety and quality are discussed at the Freshfel Europe Food Quality Committee, for which there was increased interest and support.
- The ongoing re-evaluation (REFIT) of the European food safety legislative framework will provide opportunity to reassess the European regulations (EC) 1107/2009 on placing on the market of active substances and (EC) 396/2005 on MRLs, and will assess how to ensure a high level of consumer protection. Freshfel Europe provided its comments in a stakeholder consultation of the REFIT evaluation.
- The sector should work towards full compliance with the European legislation and engage in minimising the use of plant protection products (PPPs) through improved agricultural practice. The high level of MRL compliance is confirming the steps undertaken by the sector in this area. Freshfel Europe is adamant that plant protection policy should be developed with a holistic approach and be coherent with other policy priorities.





HOOGSTRATEN

HOME OF QUALITY



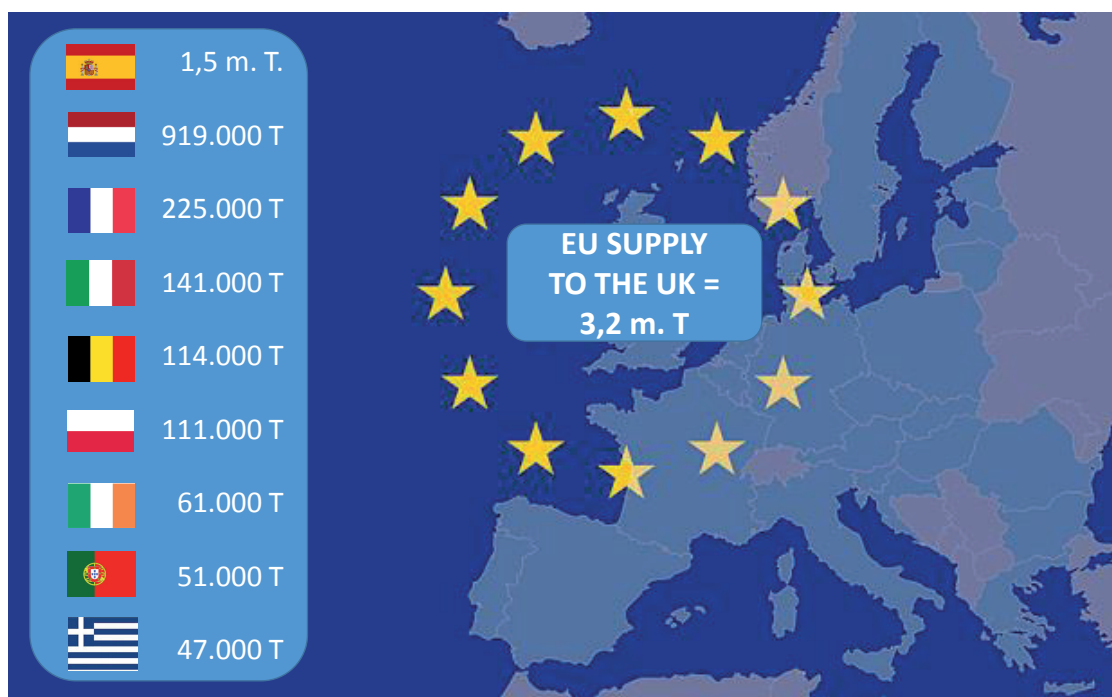
Quality to the core

Securing Trade Flows After Brexit

With the prospect of the UK becoming a third country as of 30 March 2019, negotiations are underway to finalise a Withdrawal Agreement and secure a status quo transitional period until the end of 2020, although its conclusion and ratification are still uncertain. Avoiding such a “cliff edge scenario” remains a priority, so that authorities and businesses are able to make appropriate arrangements to maintain current EU-UK trade flows after Brexit.

The next challenge is to secure a new trade relationship which allows for these trade flows to be guaranteed in the long run. The UK is a major importer of fresh fruit and vegetables, importing around 3.2 million tonnes from EU countries per year, with a value of 4 billion euros. This means that after Brexit the UK will become the first export destination for EU fresh produce, increasing the EU27 third country exports of fresh produce by 60%. This represents a major challenge for Member States’ authorities and businesses alike, especially for operators lacking experience with trade outside the Single Market.

It is in the interest of both parties to find a solution to avoid major losses for the sector and to ensure the continuation of the provision of safe, quality fresh produce to British consumers. In this context, it is essential that the authorities of both parties clarify as soon as possible the future EU-UK trading framework so that the industry may be prepared for the change on 1 January 2021.



Freshfel Europe's Activities

- Freshfel Europe has produced a Working Paper presenting the main challenges and mitigation measures for the fresh produce sector as a result of Brexit.
- Freshfel Europe is raising awareness of the challenges the industry will face after Brexit, and has held meetings with European and UK authorities, such as the Article 50 Task Force, the UK's Department for Environment, Food and Rural Affairs and the Spanish Ministry of Commerce.

Seizing New Opportunities in Trade Policy

EU trade policy has suffered numerous setbacks due to the rise of anti-globalisation, protectionist sentiment at international level led by the US as well as other new global market access hurdles. Public concerns over environmental and social standards are also a growing challenge. In this context, the EU has stepped up efforts to deepen ties with “like-minded” trade partners and has become more vocal in the defence of its interests, portraying itself as a “non-naïve” free trader. More reciprocity should aim at boosting trade opportunities in both directions.

DEEPENING TIES WITH OLD AND NEW TRADE PARTNERS

NORTH
AMERICA

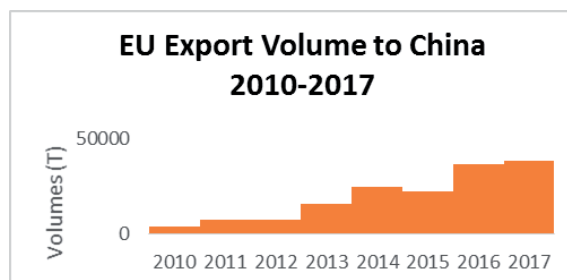


CETA’s trade provisions entered into force on 21 September 2017. In parallel, the EU and Mexico concluded negotiations on the modernisation of their trade agreement, which includes new SPS measures to increase reciprocity increasing EU exporters’ access to the Mexican market.

ASIA



The EU has continued its trade offensive in Asia by increasing economic diplomacy in the promising Chinese market and by proposing the conclusion of the agreements with Japan and Singapore. These agreements include tariff liberalisation for fresh produce, and their entry into force is expected before the end of 2019.



SOUTH
AMERICA

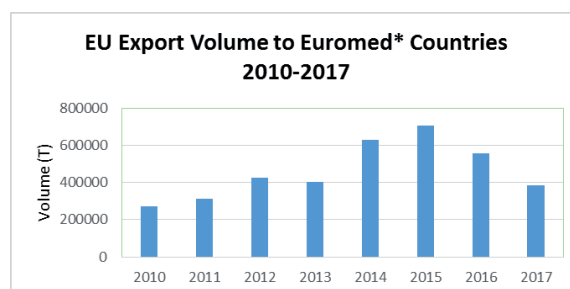


The conclusion of trade negotiations with Mercosur is impending, where all four Mercosur partners are increasingly committed to finalising negotiations and who represent good opportunities for fresh produce exports.

EU
NEIGHBOURHOOD



Following the Russian embargo, access to neighbouring countries’ markets has become increasingly important for the fruit and vegetable sector.



Nonetheless, the past few years have seen a worrying rise in protectionism with an increase of barriers, particularly across the Euro-med countries, where regional instability has also had an impact on demand. Import restrictions imposed by Algeria are of particular concern for EU fresh produce exporters.

CONTINUOUS ENGAGEMENT WITH THE US

In March 2018, the US announced the imposition of tariffs on steel and aluminium imports, sparking intense negotiations for an EU permanent exception from the measure and the adoption of a retaliation list. The potential consequences of China's announcement of an imposition of tariffs of 15% on US fresh fruit products in retaliation shall be carefully monitored.

Following the EU's commitment to the Sustainable Development Goals the EU is introducing trade & sustainable development provisions in new trade deals, whose practical implementation is gathering increasing attention by civil society.

PROTECTION OF EU STANDARDS



Freshfel Europe's Activities

- Freshfel Europe closely monitors EU trade negotiations, and has assisted the Commission's efforts to improve market access conditions for the European fresh produce sector.
- Freshfel Europe participated in the DG AGRI EU-South Korea SPS seminar and the High Level Mission of Commissioner Phil Hogan to Saudi Arabia and Iran. Freshfel Europe also represented the European fresh fruit and vegetable sector at the European Pavilion of the 12th edition of the Indian food fair 'Annapoorna World of Food India' in Mumbai.
- To continue building cooperation between the EU and China, Freshfel Europe hosted for the second consecutive year a meeting in Beijing with the support of China's Inspection and Quarantine Association.
- Freshfel Europe is contributing to individual WTO projects to help improve global trade flows, such as the WTO/IPPC project "e-phyto" to promote electronic SPS certification, and the new trade facilitation project for the Central European Free Trade Agreement launched in 2017.



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Health and Nutrition in the Spotlight

- This year EU decision-making has put health and nutrition in the spotlight. Policy focus has been placed on healthy and sustainable diets to prevent the onset of non-communicable diseases, which are becoming increasingly prevalent in Europe and are the major cause of death and disease burden in the region, as well as to help contribute to the European Commission's commitment to the Sustainable Development Goals.

EU PLATFORM FOR ACTION ON DIET, PHYSICAL ACTIVITY AND HEALTH

Freshfel Europe has become increasingly active as a member of the EU Platform for Action on Diet, Physical Activity and Health. The Platform aims to tackle European health challenges by bringing together stakeholders and by calling for commitments to specific health policy areas by the Platforms members. Freshfel Europe has three commitments to the Platform including the publication of the Fresh Times and the annual Consumption Monitor, as well as the social media campaign #FruitVeg4You, which is a joint commitment with Copa-Cogeca.



Freshfel Europe's Activities

- Increasing involvement in the EU Platform for Action on Diet, Physical Activity and Health to ensure awareness of the importance of fresh fruit and vegetables in health policy-making with continued work on Freshfel Europe's Platform commitments – the Fresh Times and Consumption Monitor.
- Successful first year of the social media campaign #FruitVeg4You in collaboration with Copa-Cogeca awaiting official evaluation by the European Commission, with a continuation of the campaign foreseen into 2018 and 2019.
- Close monitoring of nutrition and health claims and front-of-pack nutrition labelling policy developments in consultation with members.

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Building New Opportunities Based on Health Benefits of F&V

The European Commission established the European Health Policy Platform in 2016. The Platform is an online stakeholder forum to facilitate communication between the European Commission services and EU health stakeholders to increase the effectiveness and transparency of NGO contributions to the EU health policy making process. As part of the Platform's activities, each year three to four Thematic Networks take place. These Networks provide space where health stakeholder organisations discuss key EU health issues and prepare common position papers on them in the form of Joint Statements.

EUROPEAN HEALTH POLICY PLATFORM

FRESHFEL EUROPE'S THEMATIC NETWORK

In 2018 Freshfel Europe was selected to lead a Thematic Network on the topic of "Stimulating fresh fruit and vegetable consumption for healthier European consumers" due to the pertinence of this topic and continuing challenge of increasing fruit and vegetable consumption throughout Europe. Accordingly, the objective of the Thematic Network is to consolidate best practices of communicating fruit and vegetable consumption needs and how to include fruit and vegetables in the diets of EU consumers in a changing lifestyle environment.

Freshfel Europe will develop the Thematic Network's Joint Statement on the topic in collaboration with other health and agri-food stakeholders throughout 2018. The final Joint Statement will then be presented at the annual meeting of the European Health Policy Platform in November 2018 and be open for endorsement by other stakeholders into 2019.



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Promotion Policy: Calling for a Stronger Focus on F&V

- The EU promotion policy for agricultural products as set by Regulation (EU) 1144/2014 is of primary importance for fresh fruit. The large number of applications and running programmes submitted by the fresh produce sector confirm this, with the sector being one of the main beneficiaries of this policy.

ADVOCACY FOR AN IMPROVED POSITION OF F&V IN EU PROMOTION POLICY IN THE ANNUAL WORK PROGRAMME (AWP)

In 2019, the budget for the EU promotion policy Annual Work Programme (AWP) will reach 200 million euros. Replying to the stakeholder consultation for the 2019 AWP Freshfel Europe advocated for:

- A simplification of the priorities by removing the sub-budget lines to prevent proliferation of projects leading to a heavy workload both for applicants and authorities.

- The European Commission to establish broad priorities for the single market and third countries leading to sound competition among the projects based on their quality.
- A rebalanced budget with equal share for the single and third countries markets leaving applicants to decide how best to conduct priority actions, with the EU added value as the differentiation in the rate of co-financing.
- Consideration of a positive discrimination for sectors most affected by market disturbances or towards sectors which could enhance the uptake of healthy and sustainable diets and maintain or increase the dedicated budget line of 8 million euros available for the sector in 2018.
- Seek an ongoing focus on European Commission own procurement initiatives such as high level trade missions and following SPS activities to open up new selected priority markets.

Freshfel Europe's Activities

- Freshfel Europe follows the regulatory environment for the promotion policy by taking part to the Civil Dialogue Group on Promotion.
- Freshfel Europe responded to the consultation on the Annual Work Programme 2019 highlighting the specification and priorities for fresh produce.
- Freshfel Europe coordinates actions that could be taken, in particular for the specific budget line of 8 million euros for healthy diets and stimulate the consumption of fruit and vegetables.
- Freshfel Europe has taken part in the European Commission own initiatives under the promotion policy, namely the High Level Mission and the SPS seminar.



Social Media campaign

#FRUITVEG4YOU

Treat yourself everyday and join us in boosting the consumption of fruits and vegetables across the EU!



Freshfel Europe Members and Associated Members



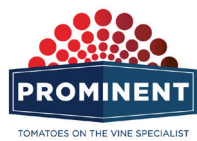
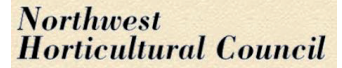
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