

ACTIVITY REPORT 2017

 **freshfel**
EUROPEAN FRESH PRODUCE ASSOCIATION



This Activity Report provides a general overview about Freshfel, its organisation and structure, as well as the topics that Freshfel is concerned with.

This Activity Report is published once a year, in advance of the Annual Event.

This version will cover the main activities of Freshfel between June 2016 and June 2017.

This work would not have been possible without the leadership of the Freshfel 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 to make the publication of this annual report possible.



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

www.enjoyfresh.eu

www.kidsenjoyfresh.eu

www.freshquality.eu



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- Delayed development and reduced incidence of sugar spots
- Improved control on rots and molds
- Extended life at retail and better taste for consumers

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4 days after scheduled delivery to retailer and removal from RipeLock Bag

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Ivan Van Dessel: ivandessel@agrofresh.com, +32 477 26 23 05
André Vink: avink@agrofresh.com, +31 651 98 74 77.

Foreword from the President

Welcome to the Annual Activity Report of Freshfel Europe. This report, released on 20th June 2017 on the occasion of the 2017 AGM in Brussels, is the reference document of Freshfel's yearly activities, covering June 2016 to May 2017. It provides an institutional overview, outlining Freshfel's structure, mission and membership but also reports the wide diversity of topics the Association is engaged in for the benefit of the membership and the sector at large.

Our Annual meeting 2016 had as theme *"Not business as usual"*. Indeed, this catchphrase, set by the European Commission for its 2016 Annual Work Programme soon became a day-to-day reality for many fruit and vegetable business operators. The world is moving faster and faster, production and trade policy are more unpredictable, technical barriers more complex to handle and consumers more and more fragmented and demanding, and the communication more and more multifaceted and influenced by social media.

In this increasingly unstable environment, the role of Freshfel Europe is even more important. Uniting the efforts of the sector is the best way forward to reinforce the category and secure the building of a brighter future for fresh fruit and vegetables. The multiplicity of the assets of fresh fruit and vegetables is the concrete foundation for a prosperous future.

In 2016/2017 Freshfel has once again been a key platform to address some of the challenges of

our industry, such as (re)convincing consumers, penetrating new markets, addressing challenges relating to climatic conditions, coping with market volatility and the ever increasingly complex food and plant safety requirements.



Altogether, Freshfel is playing an important role to reinforce the position of the fruit and vegetable category in European policy making, as well as in the food chain. As this is the best recipe for growth, this also explains why Freshfel Europe and PROFEL are joining forces for an annual conference to highlight the nutritional, healthy and sustainable value of all fruit and vegetables with a view of strengthening our produce in the food assortment of European consumers.

Consequently, Freshfel's agenda for the future will remain diversified and guided by the motivation to raise the political profile of the sector. Freshfel will assist members to develop activities in these changing and unpredictable times. Freshfel needs to be a strong, professional voice to promote and enhance the image of the category to successfully address future challenges. Freshfel can rely on the continuous support of its membership to move the produce business forward, with as its ultimate objective to stimulate the consumption of fresh fruit and vegetables.

Luc Clerx
President of Freshfel Europe



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About Freshfel Europe, its structure and organisation

Freshfel Europe is a non-profit association under the Belgian Law, with registered office in Brussels. Freshfel Europe is the European association for the fresh fruit and vegetable sector. Its members are national associations, organisations and companies with an interest in the European fresh fruit and vegetable sector, including production, trade, logistics, wholesalers, retailing and other services providers. As such, Freshfel is representing the entire vertical supply chain of the fresh fruit and vegetable sector. Therefore at the European level, Freshfel Europe has a unique and highly representative and valuable professional structure.

Freshfel organises its work in a flexible manner according to the evolving needs of its members and to better respond to emerging expectations and developments. Freshfel Europe also operates as an open organisation, where all the members and associated members can attend association's meetings organised by the association, except for the Board which is based on appointment by the AGM.

Freshfel Europe has several tools for actions :

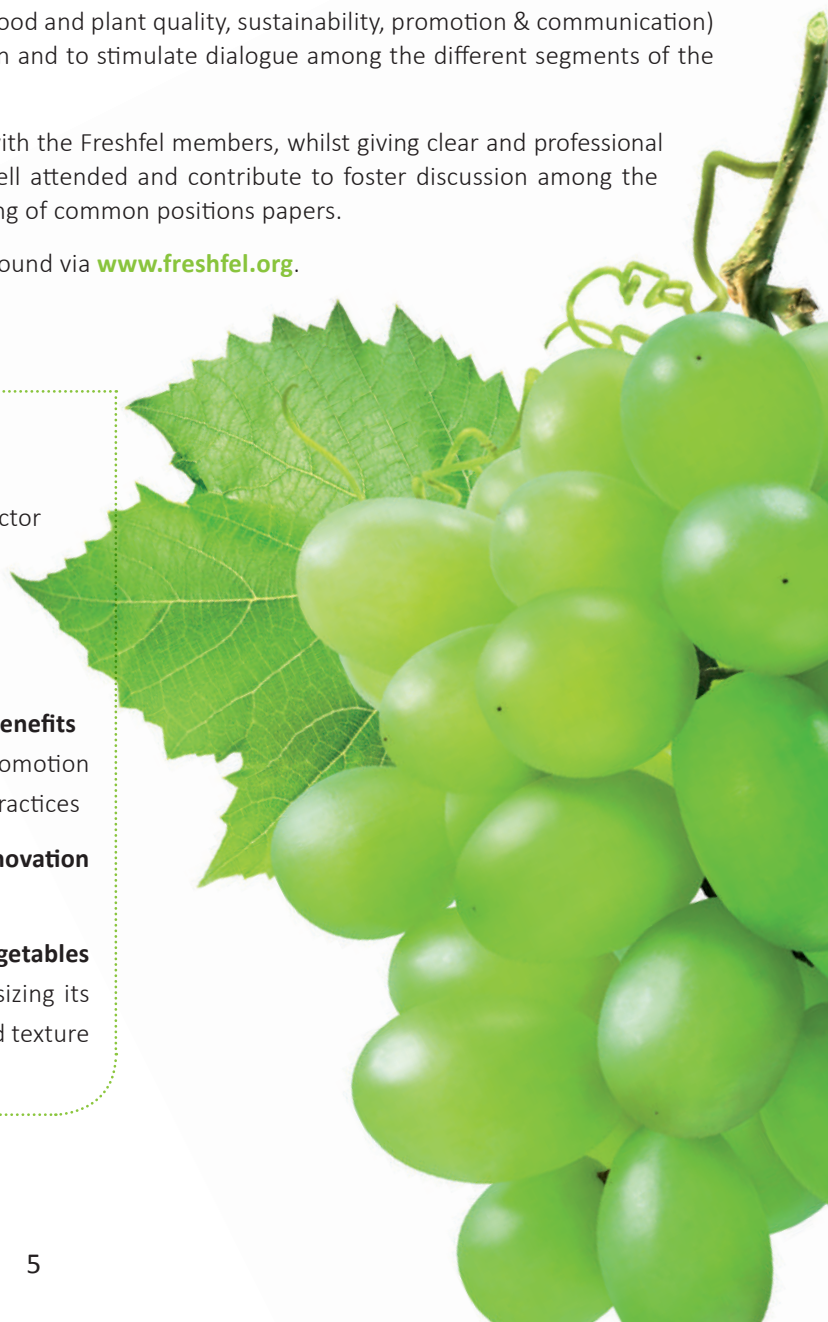
- an Annual General Meeting (AGM) with its members for statutory and corporate matters;
- a Board to steer the Association and address direction and political positioning of the association on key issues;
- several Divisions, covering business segments like production, export, import, wholesale and retail to address the specificities of the different business segments;
- several Committees, covering horizontal topics such as food and plant quality, sustainability, promotion & communication) for in-depth discussions on matters of common concern and to stimulate dialogue among the different segments of the chain.

All these meetings facilitate the contact of the Secretariat with the Freshfel members, whilst giving clear and professional directions to the Secretariat. Meetings are consistently well attended and contribute to foster discussion among the members, increase the networking and facilitate the building of common positions papers.

More information about Freshfel's and functioning can be found via www.freshfel.org.

Freshfel's mission

- improve the **efficiency and competitiveness** of the sector
- facilitate **international trade** of fresh produce
- assist members to comply with the highest **safety, environmental and CSR rules/standards**
- securing a favourable environment to **promote the benefits of fresh produce** and increase the efficiency of promotion activities within Europe and beyond and share best practices
- positioning the sector in the **new research and innovation policy**
- **stimulating the consumption of fresh fruit and vegetables** by defending the image of the product and emphasizing its healthy assets as well as its huge diversity of taste and texture and recommend to enjoy while eating fresh produce





BOUQUET
Stars

25 YEARS OF BOUQUET SEEDLESS WATERMELONS

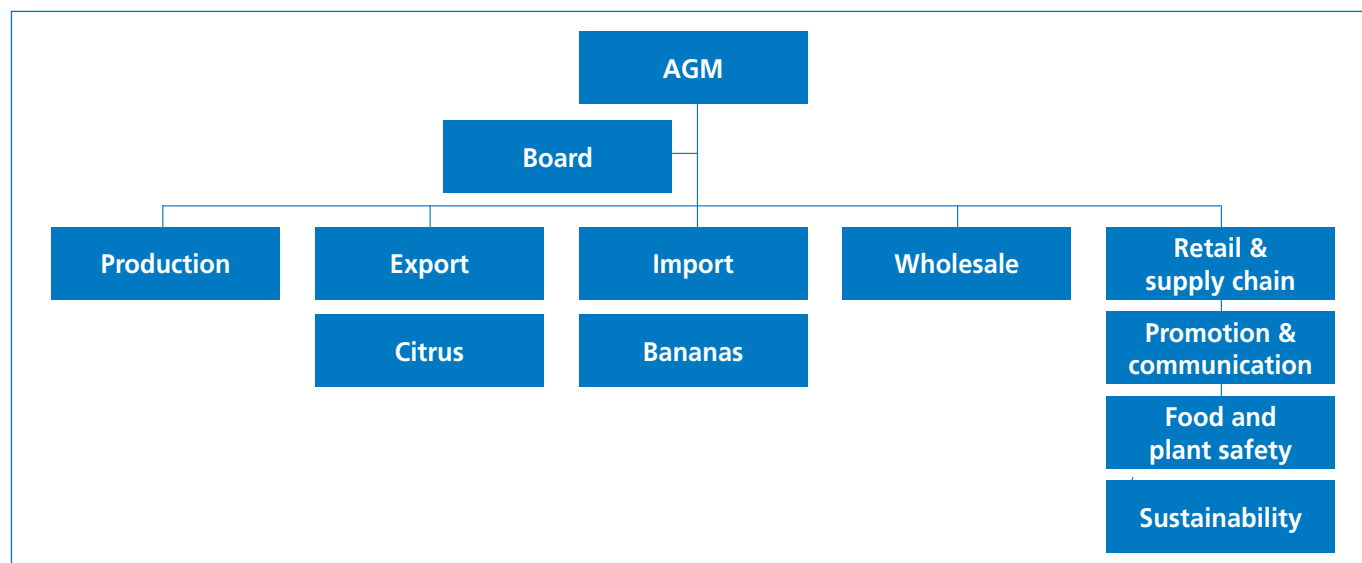
THE 10 ACHIEVEMENTS OF BOUQUET WATERMELONS SINCE 1991

- ☆ First seedless watermelon to break into the European market.
- ★ World's number one supplier of seedless watermelons and leader in seedless watermelon sales in the main consumer markets.
- ★ Family including 4 types of seedless watermelons: red, yellow, mini and black.
- ★ 2,000,000 tonnes marketed = 400 million watermelons.
- ☆ Available in 27 countries, it is the best known, top quality watermelon brand on the European market.
- ★ They represent 18% of the total of watermelons produced in Spain and 15% of Spanish watermelon exports.
- ★ Our seedless watermelons are marketed by Europe's main distribution channels.
- ★ Our watermelons are grown in different areas (Andalusia, Murcia, Valencian Region and Castille-La Mancha) which gives us an extended production calendar.
- ☆ Leading position. Availability + regularity + uniform product + top quality.
- ★ Over €10 million invested in promotion and advertising campaigns translated into 10 languages.



www.anecoop.com

About Freshfel Europe, its structure and organisation



Freshfel team for the activity June 2016 to May 2017

						
Philippe Binard	Raquel Izquierdo de Santiago	Eglé Baecke-Eimontaitė	Daphne van Doorn	Nelli Hajdu	Helene Deruwe	Linda Bloomfield
<ul style="list-style-type: none"> General Delegate Policy coherence Secretariat coordination Administration and finance Membership External representation 	<ul style="list-style-type: none"> Senior Expert Promotion policy Nutrition and health Legal and strategic advice 	<ul style="list-style-type: none"> Director Food Quality Food quality Food safety PPP and MRL Food additives Microbiological criteria Labelling Organic legislation 	<ul style="list-style-type: none"> Policy Advisor Sustainability & Health and Communication Manager Agriculture Nutrition and health Sustainability Consumption Monitor Communication Social Media 	<ul style="list-style-type: none"> Policy Advisor Trade & Communications Trade policy Plant Health E-certification and E-phyto Official controls Customs Brexit Market trends 	<ul style="list-style-type: none"> Research and Project Officer Agriculture (CAP, CMO, Marketing standards) Research and Innovation Horizon 2020 Freshfel research projects including EUFRUIT, EUROMIX, and previously Fresh Demo 	<ul style="list-style-type: none"> Membership & marketing support Membership Annual event Marketing support

Daphne van Doorn will leave Freshfel in July 2017 and will be replaced by a new colleague. Freshfel thanks Daphne for her collaboration during the last three years.



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LONG REMANENCE

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Read the label before use and check the authorized usages in your local country.

About Freshfel Europe's external collaborations

Freshfel Europe is registered in the EU *Transparency Register* under the reference n° 1637225479-02. To voice the interest and views of the sector, Freshfel Europe is interacting with a number of public and private stakeholders and organisations.

EU and international level

- Freshfel members and the secretariat regularly participate in EU Civil Dialogue Groups (CDG) and ad hoc Expert or Stakeholder groups of DG AGRI, SANTE and TRADE. Freshfel takes responsibilities of chairing or vice-chairing some of these Civil Dialogue Group meetings, such as on Horticulture through Mr. Jose Antonio Garcia Fernandez, the Director of Ailimpo.
- Freshfel is also part of two EU Platforms that were set up by the European Commission's DG SANTE, one on Diet, Physical Activity and Health and the other one on Food Losses and Food Waste.
- Freshfel also collaborates with international organisations such as the UNECE, WHO, FAO, OECD and others.

Day to day office collaborations

Freshfel cooperates closely with different associations, via different structures, which are either closely associated with Freshfel's activities or through other synergies, such as by sharing offices. This contributes to a broadening of the scope and skills of the Freshfel staff by networking and cooperation opportunities. The Associations involved in this collaboration include:



Freshfel has also a number of partnership agreements at the European level with other associations, including AIJN, AREFLH, COPA-COGECA, CELCAA, EPHA, PROFEL, PROGNOSEFRUIT, SACAR and many more on a punctual basis.

There is also a cooperation with the Paris based International Arbitration Chamber for fruit and vegetables (CAIFL), assisting in keeping updated their set of standard arbitration rules known as COFREUROP and with the Agrifood Chain Round Table on Plant Protection.



About Freshfel Europe's communication

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

- The **Freshfel Newsletter** is distributed to members on a weekly basis and includes the latest information on policy developments, the activities of the Association and important developments within the fruit and vegetables sector.
- 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.

Apart from these standard communications to its members and the general public, Freshfel of course also regularly publishes press releases and position papers, which are also communicated to policy makers to raise awareness for the fresh fruit and vegetable sector and products.



About Freshfel Europe's communication

Freshfel owns a range of websites to provide members, stakeholders and consumers with a variety of useful information about fresh fruit and vegetables and the sector.

- 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 have a dedicated **members' area**, with additional information.
- www.enjoyfresh.eu is created for consumers, to find out more information about the assets of fresh fruit and vegetables. The site offers insight into the nutritional benefits of fruit and vegetables and many other bits of information.
- www.kidsenjoyfresh.eu, as the name suggests, is created for children, parents and teachers to find adapted information about the benefits of healthy and tasty fruit and vegetables.
- Freshfel's Fresh Quality Guide on the website www.freshquality.eu keeps fruit and vegetable professionals updated about the current fresh produce legislation in the EU, such as applicable labelling rules, pesticide restrictions and quality standards.
- It is also possible to follow Freshfel's activities through the **LinkedIn page**, **Facebook page** and the Twitter account **@Freshfel**.
- Freshfel has started a social media campaign, together with Copa-Cogeca, to raise awareness and to promote fruit and vegetable consumption, so make sure to follow, like and contribute to this campaign!





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redefining fruit & vegetables

- Focus on innovation
- Wide range of fruits & vegetables
- Experts in product, production & market knowledge

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www.belortaprofessional.be

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Freshfel Europe's study and communication projects

Besides its day to day policy activities, Freshfel is also undertaking a number of initiatives or studies on specific issues. This page includes some of the activities and communication projects that Freshfel is or has been engaged in and some achievements of the last year:

Social Media Campaign #FruitVeg4You

Freshfel is eager to be more and more involved in social media. Freshfel Europe and Copa-Cogeca, representing the farmers and cooperatives in Europe, started a Social Media campaign to raise awareness and to promote the consumption of fruits and vegetables. The Social Media campaign shares content from the Freshfel and Copa-Cogeca members, as well as created content, facts and figures about fruits and vegetables and interesting articles. The hashtag of the campaign is #FruitVeg4You.



Where is the Fruit?

At the end of March 2017, Freshfel launched a report called 'Where is the Fruit', which shows that the image and name of fresh fruit is still often being misused by other food sectors. A similar report was already released by the Association in 2010. The findings of the 2017 report confirm that there are still too many products displaying fruits prominently on their packaging, despite little to no actual fruit content. The findings show that business practices of food operators are inconsistent with the objectives of the EU Regulation on food information to consumers, as well as the EU Regulation on nutrition and health claims.

Consumption Monitor

In the beginning of May 2017, Freshfel Europe published its latest edition of the Freshfel Consumption Monitor which analyses the production, trade and consumption trends for fresh fruit and vegetables in the EU-28. The analysis of the latest available data (up to 2014) shows that consumption in the EU-28 stands at 353 gram of fresh fruit and vegetables per capita per day. It represents an increase of 1.6% compared to 2013 and a slight 0.3% increase compared to the last five years (2009-2013). This is the second year that the consumption is increasing slightly, which is a hopeful sign of recovery of consumption for the fresh fruit and vegetables sector.



Forum coolingEU

The forum coolingEU is a new stakeholder platform set up in 2016. It brings together stakeholders representing the European cooling demand and supply sector to promote a more efficient and cleaner cooling supply, increase the number of dedicated research projects and raise awareness on the importance of cooling. In the last year, Freshfel participated to the stakeholder's discussion of the Forum and was associated to the dissemination of the work.

Follow us !



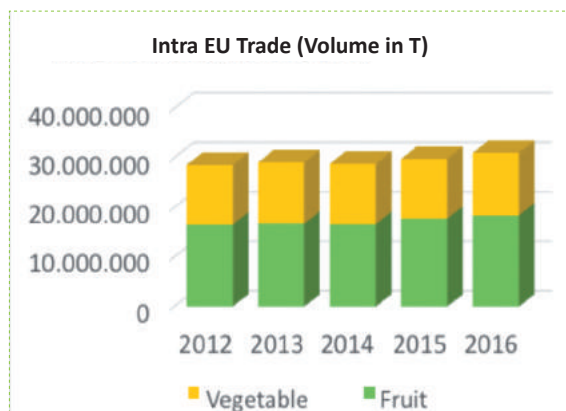
Latest sector trade flow trends



INTRA EU-TRADE TRENDS – A SAFE BANK : 2012 – 2016

Key facts

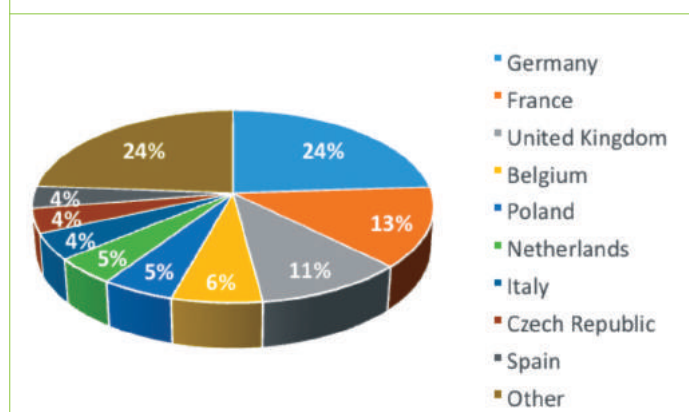
- The positive trend in Intra-EU-Trade continues in 2016
- Spain, The Netherlands, Italy and Belgium remain the biggest suppliers
- No big evolutions on the recipient side but central European member states supplies and receipts are slowly but steadily growing



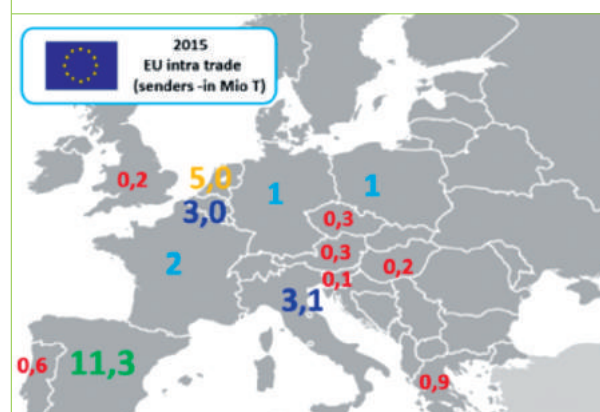
AVERAGE GROWTH OF RECEIVING COUNTRIES 10-14 VS. 2015

Country	%
Total	4,93%
Lithuania	106,6%
Romania	66,8%
Croatia	61,5%
Greece	61,5%
Bulgaria	32,8%
Latvia	16,2%
Italy	15,5%
Finland	12,2 %
Czech Republic	9,7 %
Hungary	9,4%
Estonia	-2%
Denmark	-2%
Netherlands	- 19,5 %

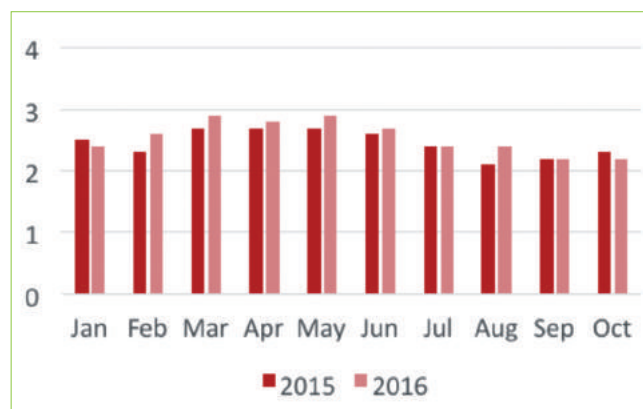
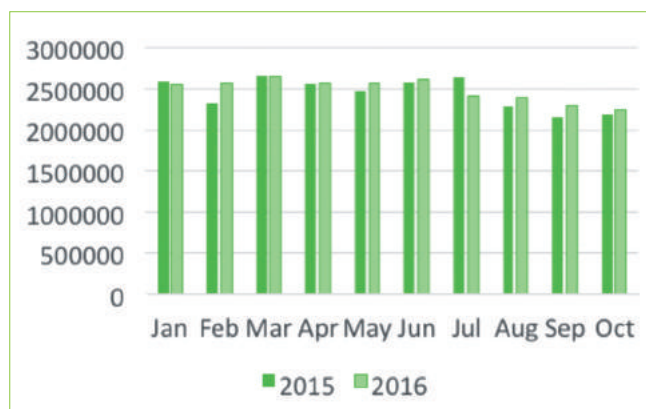
TOP 10 LARGEST RECIPIENTS IN EU-INTRA-TRADE



LARGEST SENDERS IN EUROPE



MONTHLY COMPARISON INTRA-EU TRADE 2015 - 2016: VOLUMES IN T / VALUE IN €



Latest sector trade flow trends



EU EXPORTS: STILL STRUGGLING TO RECOVER IMPACT OF RUSSIAN EMBARGO

Export - facts

- While overall trade diversified regarding destinations, it declined in volume
- Trade with Russia declined from 2,3 million T in 2013 to still 70.900 T in 2016
- Most popular exports: Apple, pears, citrus, kiwi and onions & shallots

Market developments

- Overall decline in volume
- Apple and citrus exports show the most reliability and demand
- Only export commodity growing: Kiwi
- Steady growth for onions and shallots

Exports from EU-28 (2016)

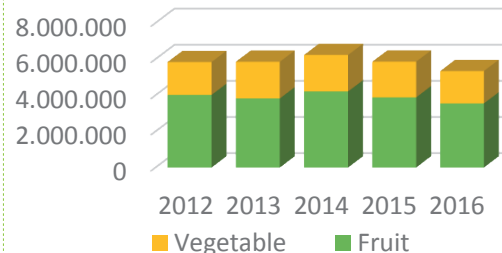
5.3 million T

4.4 billion EUR

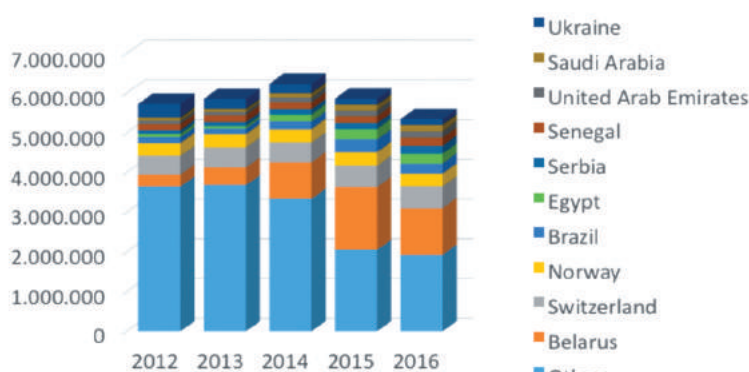
67 % fruit, 33 % veg

Growth 2015-2016:
- 8 % in volume, + 1% in value

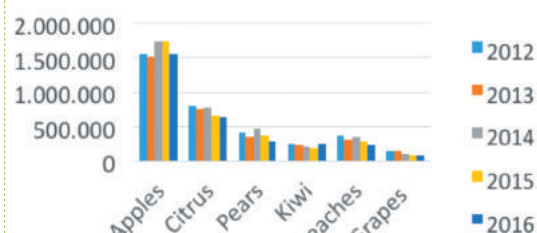
EU-Exports (Volume in T)



Export Destinations (Volume in T)



TOP 6 Fruit-Commodities (Volume in T)



EU IMPORTS: GROWTH DRIVEN BY EXOTICS & AVOCADOS

Import - facts:

- EU imports originate from more than 135 different countries
- Biggest recipients are: The Netherlands, U.K., Belgium, France and Italy
- Most popular import commodities: Bananas, oranges, table grapes, and growth of exotics and avocados

Imports from extra-EU (2016)

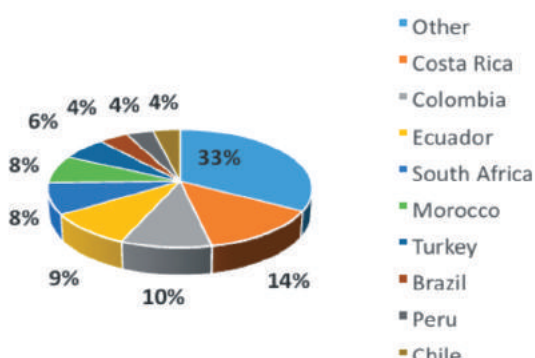
14.4 million T

15.2 billion EUR

87.5% fruit, 12.5% veg

Growth 2015 – 2016:
8% in volume, 10% in value

EU-Suppliers (Volumes in T)



EU-Imports (Volumes in T)



The SORTEX F is Bühler's new optical sorter for fruit and vegetable processors that are serious about food safety. Designed to lower the risk of contamination whilst delivering unprecedented foreign material detection for your cleanest and safest produce yet.



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Fruit and
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Working towards a new EU agricultural policy

A wide diversity of Common Agriculture Policy (CAP) instruments are relevant for the fruit and vegetables sector. Fruit and vegetables production is a major contributor to the EU agriculture value (ca. 21%), but the part of the CAP budget relating to the sector is proportionally much smaller, ranging about 3- 5% of the annual EU agriculture budget. CAP tools for our sector include among others the Producers Organizations with Operational Programmes, interbranch structure, marketing standards, entry prices, the school fruit and vegetables schemes, but also other quality aspects such as the promotion and information policy, the PGI and PDO instruments, the organic legislation, etc.

The latest revision of the Common Agriculture Policy took place in 2013, with limited impact on the fruit and vegetable rules. On the contrary, some of the tools currently in place in our sector were taken as a basis for further extension to other agricultural sectors. For the fruit and vegetables sector, the reform with the most substantial changes took place in 2007 leading to improvements of the functioning of Producer Organisations and Operational Programmes. Some

aspects of simplification and legal clarity however remain a concern to secure efficiency and attractiveness of the scheme.

Looking forward, the first discussions have started regarding the next Common Agriculture Policy (CAP) for the period post 2020. During the next years, the Commission will start to investigate what is needed for the next CAP and what action will need to be prioritized under the new multi-annual financial framework. To embark in the debate, Freshfel has drafted a general position paper on the future agricultural policy for the EU, responding to European consultation on the simplification and modernisation of the CAP. In the coming months, Freshfel will follow very closely those discussions and initiatives through its participation in the Civil Dialogue Groups of DG AGRI.

Finally, Freshfel will also have to give special attention to the role of Interbranch organisations in the coming months, considering the momentum of the Commission report on Interbranch and the growing number of Interbranch organisations in Europe.

Freshfel key messages for the future CAP

- to cope with evolving needs and altered context, both geopolitically and economically;
- to be fully coherent and complementary with other EU policy areas;
- to consolidate existing CMO tools through increased confidence and efficiency while keeping a market oriented policy whilst providing measures to prevent crises and to manage them;
- to further support Research and Innovation;
- to assist the sector to best position fruit and vegetables on internal and international markets;
- to drive consumers towards a healthy and sustainable diets with appropriate instruments.





HOOGSTRATEN

HOME OF QUALITY



A Passion for quality

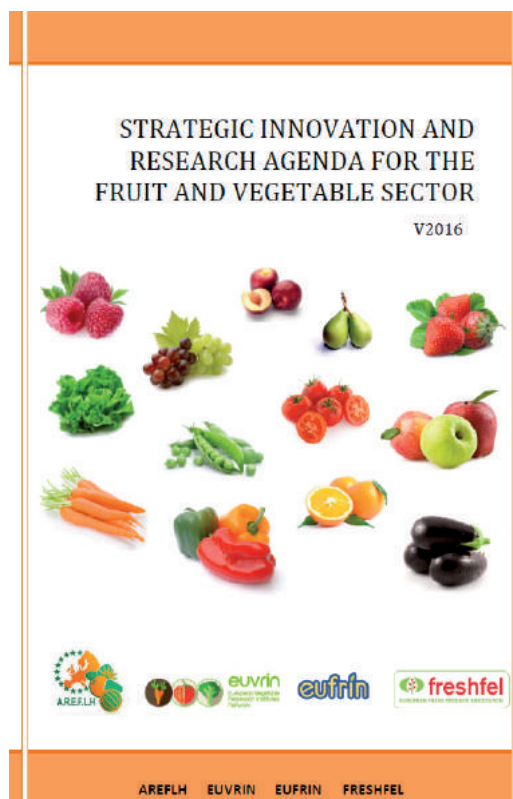


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Grasping new opportunities through research & innovation



Over the last years, the European Commission spent increasingly more attention to Research and Innovation, via its flagship initiative 'Horizon 2020', running from 2014 to 2020. The programme foresees a budget of € 80 billion for funding of Research and Innovation projects, with some projects focussing on research excellence, and others on innovation with special emphasis on the involvement of SMEs. In order to avoid that research outcomes gather dust on the shelves, the Commission created different EIPs (European Innovation Partnerships) which connects researchers, advisors, and end users of the new technologies. Also for agriculture an EIP was created (EIP-Agri). Preliminary talks on the follow up programme FP9 have started.



In order to answer to this increased attention to Research and Innovation, Freshfel joined forces with AREFLH and EUFRIN, the EU fruit research institutes network, in 2014 to create an international Task Force, which identified the priorities for the fresh fruit and vegetable supply chain in a Strategic Innovation and Research Agenda (SIRA), and which fed into the Work Programme 2016-2017. In 2016, the Task Force was joined by EUVRIN, the newly created EU vegetables research institutes network. The SIRA

underwent an update over summer 2016, now also including a more elaborate vegetable input, and was handed over to the European Commission in October.

For the upcoming Work Programme 2018-2020, recommendations of the SIRA were again considered into the draft document, with more representation of the whole supply chain in the presented calls for proposals and much attention to health and sustainability of food production.



TASK FORCE NETWORKING EVENT - 23 JANUARY 2018

ON 23 JANUARY 2018, THE TASK FORCE WILL ORGANISE IN BRUSSELS A CONFERENCE ON RESEARCH AND INNOVATION AT LARGE, AND THE WORK PROGRAMME 2018-2020 IN PARTICULAR, FOR BOTH THE INDUSTRY AND SCIENTISTS.



Freshfel Europe's commitment in research & innovation projects

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FUNCTIONAL • TECHNOLOGICAL PRODUCTS

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TRADE ITALY

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DEUTSCHLAND

 PLUS van Gorp

 DTU

 freshfel
EUROPEAN FRESH PRODUCE ASSOCIATION

Thus far, Freshfel has been involved in 3 projects under the Horizon 2020 programme. In each project, Freshfel acts as a disseminator of the research outcomes towards the industry and the wider public in general. For the call for proposals of 2017, Freshfel has been invited in 2 consortia and 1 advisory board as international expert.



Finalised project : FRESH-DEMO

The FRESH-DEMO project aimed at combining an innovative ultrasonic humidification technology with natural acidifiers. The objective was to preserve quality and freshness of fruit and vegetables along the entire post-harvest supply chain, and to contribute to food waste reduction. The project kicked off in March 2015, and ended in February 2017 with a final meeting at Fruit Logistica. During the project lifetime, several test trials were executed with strawberries, peaches and nectarines, table grapes, asparagus, lettuce, and cauliflower.

WWW.FRESH-DEMO.EU



Ongoing Projects: EuroMix & EUFRUIT

EUROMIX:

- o 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.
- o 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.
- o Aspires to provide information for future risk management decisions on the safety of chemicals in mixtures.
- o Running since spring 2015 and continues until spring 2019.
- o More information:
www.euromixproject.eu



EUFRUIT

- o 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.
- o Wants to avoid that the knowledge gathered through research is wasted as it is not properly shared throughout Europe.
- o Launched a publicly accessible Knowledge Platform on which all research outcomes and dissemination efforts within the scope of the project are published.



- o EUFRUIT was a concrete result of the efforts of AREFLH and Freshfel Europe in collaboration with EUFRIN to bring together the fruit sector and their research institutes.
- o Kicked off last March 2016 and runs until March 2019.
- o More information:
<http://kp.eufrin.org/>

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THE JAZZ SENSATION

ALWAYS
REFRESHING



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jazzapple.com |  #jazzsensation | 

Contributing to market transparency

Qlikfresh: the statistical intranet of Freshfel is a unique database for easy access to key data on production, trade and consumption. Launched in April 2015, the tool is now widely used by the membership on a daily basis. The Freshfel secretariat regularly updates the data and continues to consider new extensions and services, which could be added to this statistical and monitoring instrument.

EC Commission initiatives:

- o Freshfel and several members actively participate in the different expert groups of the European Commission monitoring apples and pears, citrus, peaches and nectarines and tomatoes markets.
- o For the first time in 2016, fruit and vegetables were included in the Annual Agri Outlook of the European Commission. Freshfel, together with the Dutch Produce Association provided an “outlook” for apples and tomatoes at a preparatory session in October 2017, while Freshfel General Delegate made a presentation at the December Agri-Outlook closing conference. Freshfel will continue collaborating with DG AGRI to improve and extend the scope for our sector. Freshfel also regularly informs its members on the EC Commission dashboard.



EP report on volatility: A session of the intergroup fruit and vegetables of the European Parliament took place in June 2016 in Strasbourg. On this occasion, and as a background to the elaboration of the European report on the CAP tools to reduce price volatility, Freshfel General Delegate presented the key features fresh produce. Understanding volatility of the markets implies a good knowledge of the diversity of the product range and diversity of qualities. Given the multiple reasons that could lead to fluctuations, transparency and good relationship in the chain are important. Providing better tools to secure a stability of the production, improving market knowledge, provide room for a contractual framework and increase role for interbranch and stimulating consumption are some of the tools to be considered to address a market stability.

International conferences: Freshfel was actively involved in different conferences on specific products trends. Freshfel made presentation at the International Bananas Congress in Miami (May 2016), at the International Tomatoes conference in Antwerp (June 2016), at the International Strawberries Congress in Quebec (August 2016) and at the International Kiwifruit Congress in Thessaloniki (April 2017). Freshfel closely collaborate with World Apple and Pear Association in charge of Prognosfruit, which took place in August 2016 in Hamburg, Germany

Freshfel Consumption Monitor: Every year Freshfel issues a Consumption Monitor. The latest version was released in May 2017. After several year of decline or stagnation, the latest data indicates a more optimistic trends initiated in 2012/2013. It demonstrates the results of the sector’s efforts to reposition fresh produce at the centre of the European consumer’s diet.



Towards a more **Sustainable future**

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

Companies should respond and transition to a sustainable supply chain.

100% recyclable with any new fibre coming from renewable sources, corrugated is the most sustainable packaging. Corrugated packaging contains 88% recycled material, reducing the need for new fibre.

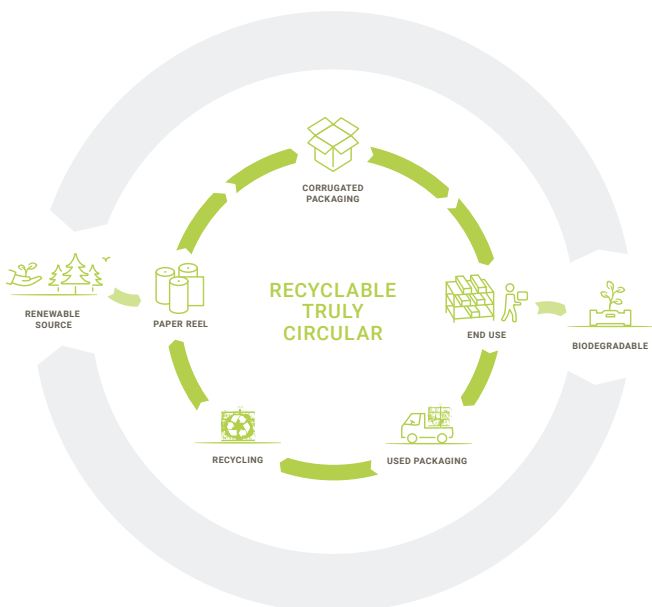
Very hygienic and fit for purpose, corrugated packaging also prevents food waste. It reduces damage, contamination and spoilage, extending the shelf life of fresh produce.



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

**Corrugated packaging:
The real circular economy champion!**

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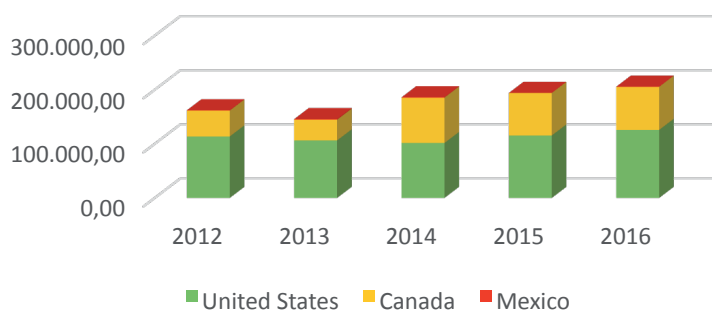
EU trade policy in rough waters

Trade policy as an EU competence has been gone through a difficult period of constant re-prioritisation over the past two years. It cannot be seen detached from global political developments. Policy development needs constantly to be reassessed. Over the past years of monitoring and shaping EU trade policies for fresh produce, Freshfel observed a constant oscillation between several anchor points and priorities.

North America:

The conclusion of free trade agreements with North American countries have been a high priority of DG Trade's endeavour to improve market access for European countries. The results could not diverge more from country to country in North America. First the conclusion of CETA (the trade agreement with Canada) went through a difficult ratification period, illustrating limits to the power of the EU caught in the middle of different European member state's interest. Nevertheless, the trade part of CETA, including improved rules on SPS, tariff dismantling for most of the fresh produce products and the protection of GI's, will come into force in 2017. Second, a different challenge ahead is the modernization of the free trade agreement with Mexico. Concluded in 2001, it only brought one-sided benefits for the fresh produce trade. Mexico has been fully benefitting from the EU open import system and the tariff dismantling to raise its fresh produce exports to the EU during the 15 years of FTA from 15.000 T to more than 220.000 T while EU exports to Mexico remained totally flat at 150 T, despite genuine interests from EU exporters! This situation is mostly a result of very restrictive and excessive SPS measures and obligations for fresh produce at market access, which hinder reciprocal results for the trade. Thirdly, the finalisation of the TTIP agreement with the USA has been disrupted by the current change of administration. Negotiations which were at an advanced stage are frozen for the time being.

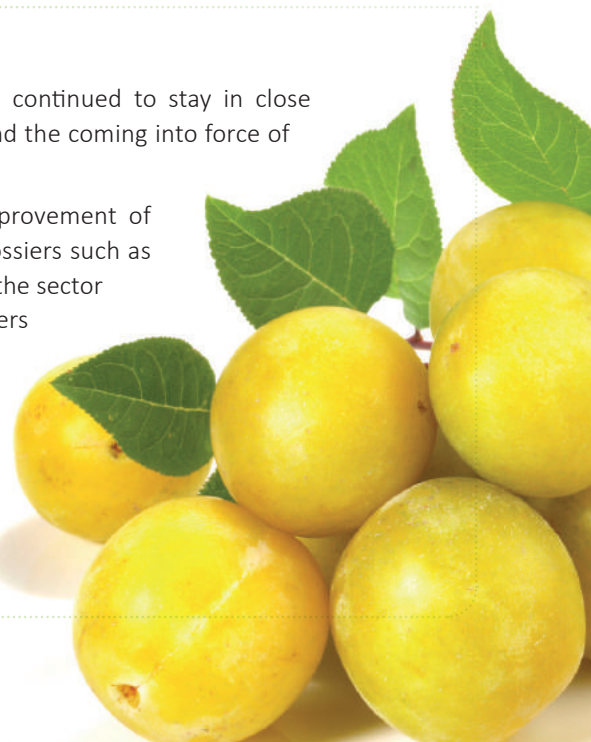
**EU Trade with NAFTA countries
(Volume in T)**



Total in 2016: 206.000 T
€ 350 mio.

MAIN ACTIONS OF FRESHFEL EUROPE

- **Canada:** Freshfel has been advocating for the ratification of CETA and continued to stay in close exchange with the SPS unit of DG Trade, to settle arising challenges around the coming into force of the agreement.
- **United States:** Freshfel has been working on the acceleration and improvement of market access to the U.S., the moving forward with regard to pending dossiers such as the work plan on apple- and pear, and has been presenting the position of the sector to the EU as well as to the U.S. stakeholders during the latest stakeholders consultation round EU-USA in 2016.
- **Mexico:** Building on the momentum created by the visit of Commissioner Hogan and the business delegation, Freshfel continued to highlight the existing challenges with regard to SPS and market access to Mexico and closely support DG Trade's work with data, the reporting of practical challenges as well as constructive solution proposals on the improvement of the SPS conditions in the new trade agreement.

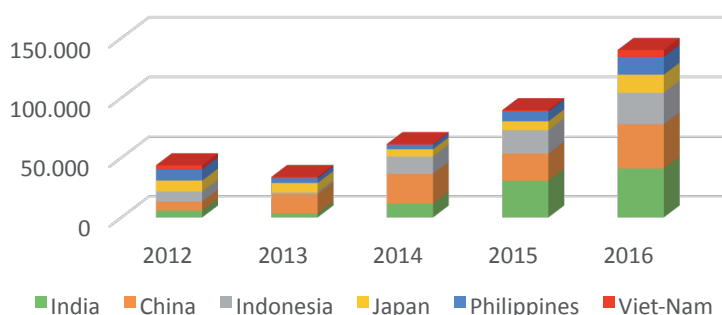


EU trade policy in rough waters

Asia:

Asian countries have been always a high priority, but gained a new momentum with the current change of administration and political priorities in the U.S. and the cancellation of TPP (Trans Pacific Partnership Agreement). The European Commission is fiercely working to conclude free trade negotiations with Japan, which have been stuck on SPS matters and market access for agricultural products, both sensitive topics on the Japanese side. The Commission is further reinforcing the trading relationship with China, using economic diplomacy tools on various hierarchical layers. This includes intensified exchange with officials, the organisation of technical workshops, exchanges and increased partnership. Also the trade relationship to India is currently under review. The European Commission is following a multifaceted approach by DG Trade and DG Agri to test the market environment on its readiness to re-start new free trade negotiations. This includes promotional campaigns as well as the mapping of market access barriers and the intensification of mutual exchange. India is a promising market for fresh produce trade with nearly 80.000 T of exports from the EU to India in 2016. Vietnam FTA was concluded at the end of 2015 and will progressively provide its benefits. New trade agreements are planned with the Philippines and Indonesia, which remain promising markets with a challenging regulatory environment, ranging from SPS conditions over certification and food safety requirements.

**EU Trade with key Asian countries
(Volume in T)**



**Total in 2016: 140.000 T
€ 174 mio.**

MAIN ACTIONS OF FRESHFEL EUROPE

- In all key Asian countries, Freshfel is closely monitoring the regulatory environment and aims on updating its membership regularly on upcoming changes. Furthermore, Freshfel is working together with the respective Units of DG Trade, Agri and Santé, to improve the market access conditions for European Fresh produce.
- Freshfel continued to highlight current pending protocols and market access challenges with Japan to the negotiators, to ensure a positive and improved outcome for SPS and market access.
- With the understanding that China is a growing market for the fresh produce industry, Freshfel continues to build up its network with European and Chinese stakeholders, to create additional momentum for exchange and dialogue on the sectoral level, such as happened during the Workshop together with the Chinese Inspection and Quarantine Association in Beijing in November 2016.
- Freshfel has become a key stakeholder to DG Trade's project on tackling trade barriers in India. Freshfel and its membership has been supervising the drafting of the "Handbook for EU Exporters of plant and plant products into India". It further contributed to the information collection on the Methyl Bromide fumigation requirements and the search for alternative solutions.

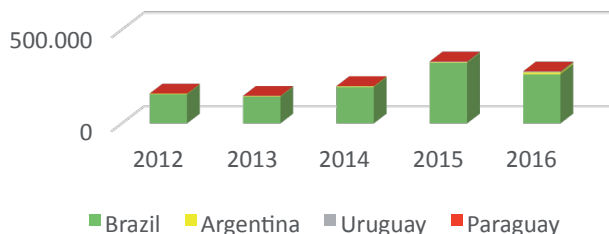


EU trade policy in rough waters

MERCOSUR: Brazil, Argentina, Uruguay and Paraguay:

The restart of negotiations with the Mercosur countries came in troubled waters, as defensive and offensive interests vary along the range of agri-food-sector. In particular Brazil has been a growing export destination for the fresh produce industry, with 262.000 T of fruit and vegetables exported in 2016. Despite the positive growth, these countries still have a couple of administrative barriers in place which do need to be tackled in the upcoming negotiations. Elsewhere in Central and South America, the FTAs were fully implemented, including with the inclusion of Ecuador in the Andean FTA, creating among others a level playing field in regard to bananas among the Latin American suppliers, though under a surveillance mechanism up to the end of the duty dismantling phase.

**EU Trade with MERCOSUR countries
(Volume in T)**



Total in 2016: 278.000 T
€ 233 mio.

MAIN ACTIONS OF FRESHFEL EUROPE

- Freshfel has been monitoring the Mercosur negotiations very closely and advocated at various occasions for improved SPS conditions. In its position paper as well as during meetings with EU Member States attachés and chief EU negotiator, Freshfel proposed to introduce the same streamlined market access procedures for each of the four Mercosur countries to facilitate the understanding and to harmonize conditions and speed of market access applications for fruit and vegetables. A time-limitation to the processing of application would significantly improve the planning security and commercial level of playing field for the industry.
- Freshfel continued to closely monitor the follow up of market access conditions with existing Central and Andean countries and will also review the opportunities of the upcoming modernization of the FTA with Chile.





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 seven key fields of knowledge:

Nutrition and health

Food safety and Quality

**Market Intelligence and
Statistics**

Logistics and ICT

Social policy / labour

Opening new markets

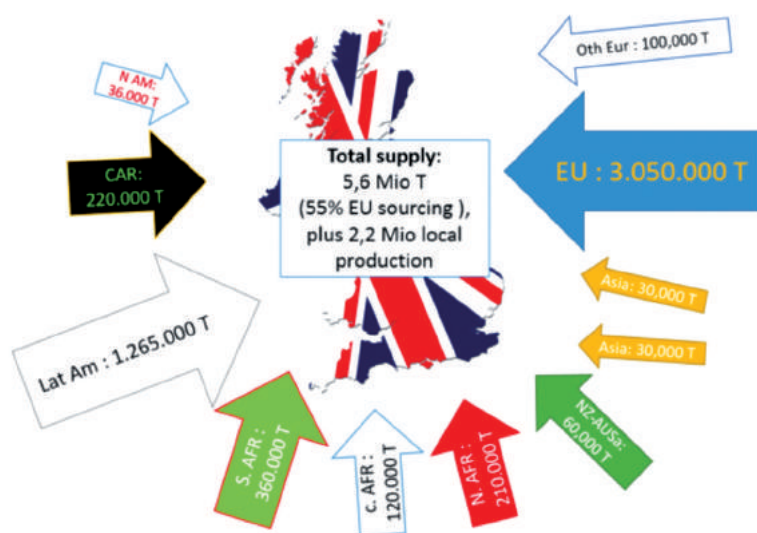
Sustainability

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.



Louis Pasteurlaan 6
2719 EE Zoetermeer, Nederland
www.groentenfruihuis.nl

Getting prepared for Brexit



The British Government has triggered Art. 50 at the end of March 2017 and with this has been setting the deadline for the conclusion of the divorce negotiations and future trade arrangements at the 29th of March 2019. The European Commission and the Council have agreed on a two-phased negotiation approach, settling first certainties for citizens and businesses, settling the bill and the Irish border situation and only after an agreement on these matters, widening the scope of negotiation to the future relationship, legally confirmed by another mandate from the European Council. This would include a lot of economical, legal, technical questions. With the notification, a period of uncertainties for businesses, and in particular for the fresh produce industry, is laying in front of us.

With acknowledging the complex challenges of the upcoming negotiations, Freshfel created an inventory of issues for the fresh produce trade between the EU-27 and the United Kingdom. Fruit and vegetables shipments from the EU-27 to the U.K. are significantly contributing to economic stability and growth of the sector as well as the general positive performance of the fresh produce business. It is therefore of utmost importance to work towards smooth transitional

arrangements, aiming on securing the current trade without major loss in volume and values. As a point of comparison, volume from EU 27 shipped to the UK are 36% higher than total EU exports to Russia prior to the embargo, and with moreover quality and value significantly higher.

Several areas of concern have been identified, which will need to be closely followed, as soon as negotiations uptake. Among the biggest challenges will be to maintain the existing fresh produce trade with U.K. including fast customs procedure and control operations at the port entry as well as the clarification of the policy line followed with regard to duties and fees after the leave and as much as possible maintain duty exemptions. Also, it is of the utmost importance to maintain the competitiveness of the EU 27 supply in the UK market for fresh produce, avoiding negative impact of potential upcoming changes by the UK of plant health, food safety, quality and tariff and tax requirements, which could distort trade from a logistic perspective. Also the handling of the administrative divorce with regard to the requirements of plant health, food safety, quality and origin certifications will pose additional burden to the debate for EU-27 Member States considering the volume at stake. Significant changes can also be expected with regard to the reporting to the Rapid Alert and the Europhyt system, the long-term divorce from several common legislations such as the EU General Food Law, the European Plant Health Legislation, the common standards on MRL's, EU plant variety rights, common Food Hygiene conditions and the trade with organic fruits and vegetables or PGI-PDO. Freshfel had the opportunity to present the status quo of the inventory to members of the Task Force on Art. 50 of the European Commission and will continue to work with the EU-27 negotiators but also with its UK members to ensure the most positive outcome for the fresh produce trade possible.



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Freshfel Europe's engagement to open new markets

In the last decade, the European fruit and vegetables sector significantly increased its position on international markets. The growth was mainly driven by the demand of the Russian market as well as the Mediterranean neighbourhood. The decline of these markets implied that the sector had urgently to take new initiatives to diversify the presence of EU fresh produce on international markets and take full benefits of the potential growth on emerging markets around the globe. To reach this objective, Freshfel is active on multiple fronts:

- **High level trade mission with Commissioner Hogan:** Freshfel's General Delegate as well as several Freshfel members actively participated to the delegations accompanying Commissioner Hogan in its diplomatic offensive. In 2016, Columbia, Mexico, China, Japan, Vietnam, Singapore and Indonesia were on the agenda, while in spring 2017 a new mission was undertaken in Canada. Freshfel makes the most of these market access opportunities, addressing SPS concerns during the Mission and seeking follow up actions to build growth.
- **Stand-alone Freshfel workshop in China:** To follow up the High Level Trade Mission in China, Freshfel organized in October 2016 a follow up action in Beijing. A large delegation of European exporters (and officials) took part to the event with representation of interest from 10 Member States. Meetings were organized with CIQA, AQSIQ and with the EU delegation. The objective of fostering existing trade and seeking improvement market access conditions was fully matched. Freshfel is already preparing a similar event for November 2017. This is also a window for a European approach, in line with the Single entity approach.
- **Ongoing monitoring of the Russian market:** while the embargo is still on, Freshfel kept its annual encounter in Moscow on the occasion of *World Food Moscow* with the representatives of the EU delegation and Member States. This annual meeting is always an excellent opportunity to review the state of play in Russia and an outlook for the future.
- **SPS Market Access Committee of DG TRADE:** For several years, Freshfel is the voice of the European fruit and vegetables sector and very active in this unique triangular committee incorporating the European Commission, Member States and agricultural businesses. This Committee reviews SPS matters and other hurdles hampering the fruit and vegetables export trade. In this Committee, Freshfel is also advocating for the setting up of new tools to facilitate negotiation and trade, such as a Market Access data base. It could better identify market access conditions, leading to an inventory of protocols in place or in preparation. This could streamline and harmonize conditions for EU exporters, facilitate FTA negotiations and bundle efforts for markets opening. Freshfel is also collaborating with projects such as ELANbizz and also cooperates with DG TRADE programme of SPS experts from third countries visiting Brussels.
- **Enhancing the Single entity concept and joining forces on SPS issues:** Freshfel is playing an important role in joining forces with the Commission services to bundle efforts on market access when appropriate. The USA apples and pears dossiers but other opportunities such as with kiwifruit to Chile or those resulting from the modernization of FTA are some examples of actions that could in the future facilitate market access and improve reciprocity.



Quality requirements in an evolving environment

In the last year Freshfel was active in different dossiers that could enhance or secure quality of fresh produce. Below is just a non-exhaustive review of initiatives undertaken by Freshfel Europe:

Marketing standards and labelling: After years of unchanged rules, the European Commission reopened the discussion about marketing standards. Several aspects are relevant for this debate, including the discussion on simplification of EU legislation, the alignment with international UNECE standards, but is also closely connected to the debate on food waste, evolving trade practice with diversification of market outlets and other aspects of labelling. A coherence between the marketing standards rule on labelling and those of the European legislation on food information to consumers is important. Freshfel has been a catalyst of the sector expectations in regard to the re-evaluation of European marketing standards.

Marketing standards are an important reference tools for the sector, but its provisions need to constantly take into account the evolution of business practices to match the requirements of day-to-day reality. Freshfel is closely liaising with its members and the European Commission to secure the most practical solutions on this marketing standard dossier.

Freshfel priorities on marketing standards and labelling

- Alignment of EU marketing standards with UNECE standards.
- Provisions regarding on-line sales of fresh fruit and vegetables and indication of the particulars.
- Provisions for the packaging of fruit and vegetables of mix origins and also mixed products.
- Logistics implications of indicating the origin on the invoice and other accompanying documents.
- Identification of operators on the packaging and different requirements of the legislation (packers, dispatchers, importers).
- Difference of rules applying to raw products and minimally processed fruit and vegetables;
- Use of languages.

Certification: Freshfel also continued to monitor GlobalGAP activities, and in particular the activities of the Technical Working Group Crops. Standards need to be practical, cost effective and as much as possible benchmarked. In September 2016, GlobalGAP summit was celebrating 20 years of farm certification. On this occasion, Freshfel secretariat contributed to the debate of the plenary session on *“Bringing more government on Board”*. With the participation of not only the European Commission, the USDA but also of the Dutch and Japanese food safety agencies, the debate explored the benefit of public-private partnership and how far private standards (GlobalGAP, IFS, etc.) could assist public authorities to secure compliance with the regulation. This is a complex benchmarking process, linked as well at EU level to the reshape of the Official control legislation.

Arbitration: Freshfel collaborates with the International Chamber of Arbitration for fruit and vegetables and with its chair Mr Philippe Ruelle from UGPBAN. The Chamber is also providing guidelines for business through the COFREUROP, which are kept updated by different business associations, including Freshfel. COFREUROP fixes clear rules and obligations for buyers and sellers in the fresh produce business.



Consumer confidence through food safety commitments

Besides all the undisputed healthy assets of fresh fruit and vegetables, a number of issues need to be closely monitored to secure consumer confidence. A close monitoring legislation and full compliance with the complex EU requirements on active substances and MRL, on microbiological risks, on food additives, on biocidal products, on fertilizers, on sanitizers and contaminants is crucial. Last year's activities have been no exception to the rule, demonstrating once again 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. All matters related to food safety and quality are discussed at Freshfel Food Quality Committee meetings, for which there was increased interest and support during the last year.

The upcoming re-evaluation (REFIT) of the European food safety legislative framework will provide the sector with the opportunity to reassess the European regulations (EC) 1107/2009 on placing on the market of active substances and (EC) 396/2005 on MRL. Freshfel is eager to make suggestions on how to improve the European legislation while ensuring a high level consumer protection. Freshfel aims for full compliance with the European legislation, while also minimising the use of plant protection products (PPPs) and moving towards better agricultural practice.

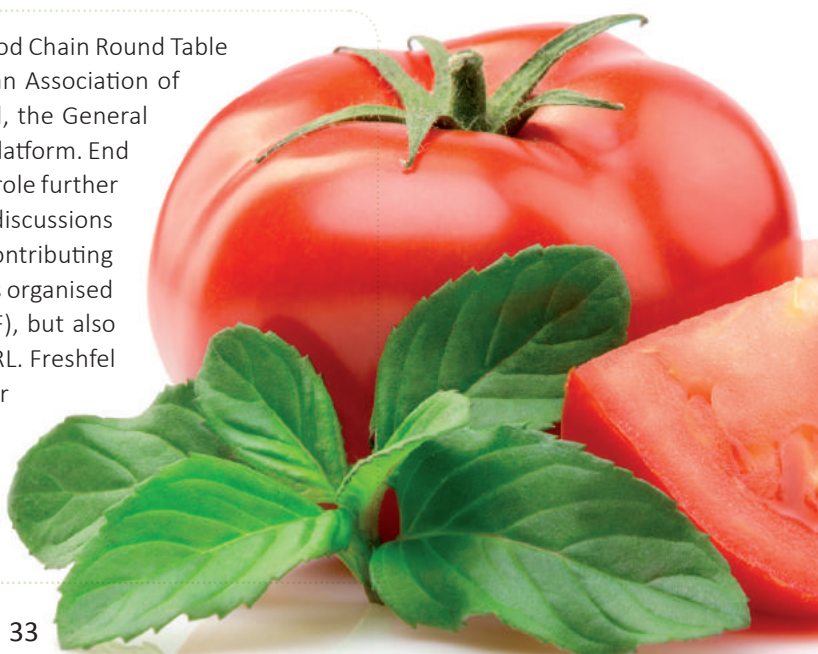


The high level of MRL compliance is confirming the steps undertaken by the sector towards this common goal.

The plant protection dossiers have to be seen in a broader picture and coherent with other policy priorities such as food waste, plant health

requirements, climate change & new breeding technics. A holistic and coherent approach is needed. The use and availability of active substances (also other than PPPs) have to be seen in perspective of priorities of the European institutions in regard to microbiological contamination. The 2014 Zoonosis Monitoring Report states that majority of verified outbreaks in the EU were associated with foodstuffs other than fruit and vegetables, but the possible consequences of microbiological contamination of fresh fruits and vegetables (FFV) cannot be underestimated as shown by the German crisis linked to the contamination of sprouts by Verotoxin-producing *Escherichia coli* (VTEC). To protect European and non-European consumers from microbiological risks, the European Commission finalised in 2016 its *"Guidance document on addressing microbiological risks in fresh fruits and vegetables at primary production through good hygiene"*, to assist growers at primary production to apply in a correct and uniform way hygiene requirements. Freshfel was closely associated with this work.

Freshfel is also actively involved in the activities of "Agri-food Chain Round Table for Plant Protection", an informal network of 22 European Association of the Agri-food Chain. At the start of 2015, Philippe Binard, the General Delegate of Freshfel, was appointed as a chairman of this platform. End 2016 Philippe Binard stopped his mandate and passed the role further on to Europatat. In this platform, Freshfel engaged in the discussions on minor uses and speciality crops by participating and contributing to the discussion at the Plenary and brainstorming sessions organised by the European Minor Uses Coordination Facility (MUCF), but also on improved transparency for the Plant Protection and MRL. Freshfel is vigorously challenging the ECPA campaign "with or without pesticides" which unfairly and restrictively use fruit and vegetables as a vehicle of communication of its campaign, contradicting the sector commitment to reduce its pesticide dependency.



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Prioritising plant health for safe production and trade

The EU is reshaping its plant health policy. Following the political compromise reached in December 2015, Regulation (EC) 2016/2031 on protective measures against pests of plants was adopted. The new scheme will come into force in December 2019. In the meantime, many Implementing and Delegated acts will have to be adopted to finalise the practical details of the new rules.

In parallel, and given the increased attention given by the European Commission on plant health matters, the annexes of directive 2000/29 were also under scrutiny and reviewed to either reinforce existing criteria or incorporate new quarantine organisms in the legislation.

The debate around these initiatives were intense, demonstrated significant divergences of positions among the Member States, between the EU and third countries, between different positions among European producers and/or traders or also between the Northern and Southern part of the EU.

On this background, the Freshfel Board elaborated some guiding principles to reconcile positions and facilitate the important role that the fruit and vegetables sector could take to assist the European Commission in elaboration of technical responses to the growing plant health challenges.

Freshfel Board's guiding principles on plant health

- The European production is of outmost 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, which should also become more reciprocal with many trading partners.
- The supply chain represented in Freshfel Europe has an important role to play to approximate diverse perspectives and comprehend its responsibility to be part of solutions that would govern production and trade of fruit and vegetables in regard to plant health.

On this background and with the support of an ad hoc Task Force, Freshfel will actively contribute with the technical support of the experts in the Food and Plant safety WG of Freshfel to the elaboration of the new legislation and the necessary amendments of the annexes of current legislation (Directive 2000/29).

A close monitoring of Europhyt interceptions to address non-compliance, the confidence and homogeneity of controls, a science base elaboration of parameters based on IPPPC standards, a close follow of the implementing acts on plant health certificate and on high risk products, as well as the search for better reciprocity with third country partners are some of the key priorities and actions for Freshfel and its members in the past months as well as for the future.





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Our extensive global partnerships with growers enable us to offer a unique range of best-in-class products in every popular format – fresh, frozen and prepared. We work side by side with our customers to offer them added-value services and help them to delight their customers with product innovations. We are driven by the desire to grow together with all of our partners in a mutually sustainable way.

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For more information: www.wearegreenyard.com

for a healthier future

Sustainability: from a buzzword towards day-to-day reality

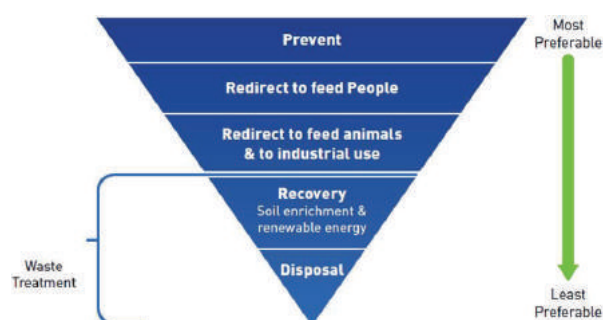
Freshfel's Annual Event 2017 has as a theme 'Fruit & Vegetables – healthy and sustainable solutions to Europe's food challenges'. Sustainability has become increasingly important and in the future will be an integral part of a wide variety of policies whether it is agriculture, trade, quality, health or nutrition. Not only policy makers, but also consumers are increasingly concerned with sustainable food production and consumption, as well as adopting a more sustainable lifestyle.

On this background, Freshfel organised a workshop dedicated only to sustainability, to exchange about trends and practices, to better understand the scope and perspectives from the different segments of the fruit and vegetables supply chain, as well as the different aspects of sustainability (social, environment and economy). The meeting also reviewed the different certification schemes and its administrative, cost and trust implications. Building on this successful workshop, a new follow up meeting will be planned towards the end of 2017.

Given that sustainability is also increasingly integrated in trade agreements, Freshfel will follow aspects related to sustainable development and converse between third countries suppliers and the requirements of the EU supply chain.

Food waste prevention

Food waste is one of the topics currently high on the EU's agenda. It is also one of the priorities among UN Sustainable Development Goals. Given the increased importance of sustainability, the Commission launched end 2015 a legislative framework on the "*Circular Economy Package*". It includes matters such as (food) waste prevention, but also anything relating to re-using, repairing, refurbishing and recycling.



At the end of 2016, the European Commission launched an EU Platform on Food Losses and Food Waste. This Platform has been set up as an exchange forum for stakeholders, Member States and EU Commission to create guidelines in preventing food waste. To closely follow this topical issue and provide the specificities and perspectives of fruit and vegetables, Freshfel is a member of this EU Platform. One of the major first step for the Platform is to develop a common methodology on calculating food waste. Several sub-groups are working on creating a methodology, but also looking into guidelines for food donation, food to feed facilitation, etc.

Organic production policy reform

In March 2014, the Commission published its proposal regarding new rules for organic production and organic farming. The Council and the European Parliament both created their own positions and amendments to the original proposal. On this background, the negotiations between the three institutions started in 2016. At the time of printing this report, there has still not been any compromise conclusions. Freshfel has continuously provided feedback to the institutions through updated position papers, bilateral meetings, as well as through Civil Dialogue Group meetings.



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Growing importance of nutrition & health in consumption patterns

Fresh fruit and vegetables are not only a sustainable food choice, but also a healthy food choice, one of the key messages behind Freshfel's 2017 Annual Event organized in cooperation with PROFEL. To grasp all the benefits of these assets, policy makers, as well as the sector should join forces to stimulate the consumption of sustainable and healthy fruit and vegetables.

Nutrition and health claims

With regards to policy, the EU has several pieces of legislation that try to facilitate healthy consumption, such as the Regulation on nutrition and health claims (1924/2006), which is currently being evaluated by the European Commission. This legislation covers nutrition and health claims made on food. Freshfel has been active in the evaluation process of this legislation, via updated position papers, consultations as well as other activities.



Where is the Fruit?

One of the activities related to claims made on foods has been Freshfel's publication of the 'Where is the Fruit' stud. The 2017 edition, confirmed the findings of the first report back in 2010. It shows that there is still a lot of room for improvement with regards to consumer information. The report provides evidence that many products that are displaying fruits prominently on their packaging, effectively contain little to no actual fruit in their composition. Out of the 188 products investigated from 13 EU Member States (covering 80% of the EU population), only 20% had a fruit content of 50% or more. Another 7% of products contained no fruit at all. To complete the figures, another 34% contained less than 10% of fruit and another 34% contained between 11% and 50% of fruit. These findings show that business practices of food operators are misleading consumers and are inconsistent with the objectives of the EU Regulation on food information to consumers, as well as the EU Regulation on nutrition and health claims.

European Platform for Action on Diet, Physical Activity and Health

Since 2005, Freshfel is an active member of European Platform for Action on Diet, Physical Activity and Health. The platform aims to tackle the growing rate of obesity and related illnesses by bringing together stakeholders and by calling commitments from the sector. Freshfel have two active commitments: the 'Fresh Times' and the 'Consumption Monitor'.



As mentioned earlier in this report, Freshfel Europe and Copa-Cogeca, representing the farmers and cooperatives in Europe, started a Social Media campaign #FruitVeg4You to raise awareness and to promote the consumption of fruits and vegetables. The social media campaign #FruitVeg4You has also been submitted as one of Freshfel's commitments under the umbrella of the Platform. It is a joint initiative of Freshfel with COPA-COGECA.



Growing importance of nutrition & health in consumption patterns

DEVELOPMENT OF CONSUMPTION 2014 VS. THE AVERAGE 2009-2013

Apples & pears	3,5%
Bananas	6,2%
Cabbages, cauliflowers	-0,8%
Carrots & turnips	2,7%
Citrus fruit	-1,4%
Cucumbers & gherkins	1,6%
Dates, figs & exotics	16,0%
Leguminous vegetables	-11,7%
Lettuce & chicory	-8,9%
Melons & papayas	-7,0%
Onions, shallots, garlic	2,0%
Stone fruit	4,6%
Table grapes	-2,4%
Tomatoes	-2,1%
Other fruit	-1,2%
Other vegetables	1,0%

Consumption: towards more positive trends

In May 2017, Freshfel Europe released the latest edition of its Freshfel Consumption Monitor, analysing trends in the production, trade and supply of fresh fruits and vegetables across the EU-28, as well as consumption trends in Norway, Switzerland and the USA. The latest Consumption Monitor covers the period from 2009 to 2014.

This annual report is part of the actions undertaken by Freshfel in the framework of the EU Platform for Action on Diet, Physical Activity and Health. Freshfel is a member of this platform, where it represents the fruit and vegetables sector at European level.

The analysis of the latest available data shows that consumption in the EU-28 stands at 353 gram of fresh fruit and vegetables per capita per day (192 grams of fruit and 161 grams of vegetables). This represents an increase of 1.6% compared to 2013 and a slight 0.3% increase compared to the last five years (2009-2013). This is the second year that the consumption is increasing slightly, which is a hopeful sign of recovery of consumption for the fresh fruit and vegetables sector. Regrettably, the EU average as well as the one of too many Member States remains well below the minimum daily intake of 400 gr per capita recommended by WHO. Much opportunities therefore remain to improve the consumption rate. In this respect, Freshfel continue to review the parameters influencing the trends and keep this on the top of its agenda.

School fruit and vegetables scheme

With the fruit and vegetables consumption trends of the last decade, the School Fruit and Vegetable Scheme remains an important tool for the promotion of fresh produce, stimulating and educating children to consume more fruit and vegetables and discover the diversity of taste and texture. At the end of 2015, the European Commission services confirmed the importance of the scheme in an evaluation report.

As decided upon at the end of 2015 by the Commission, Council and Parliament, the current School Milk Scheme and School Fruit and Vegetable Scheme will be merged under a single legal framework on 1 August 2017, in order to reduce the administrative and organisational burden. The total EU budget of €250 million per school year will be distributed with €150 million going to fruit and vegetables, and €100 million to milk. For the upcoming 2017/2018 school year, Germany will be eligible to €26 million, Italy €22 million, France €18 million, Poland €15 million, and Spain €13 million.



New opportunities for the promotion of EU agricultural products

Freshfel actively contributed to the debate leading to the EU new legislative framework for promotion and information for agriculture products, which is now in force since 1 December 2015. The most relevant legislative acts include the basic act (Regulation (EU) 1144/2014) and the related Commission Delegated Regulation (EU) 1829/2015 and Commission Implementing Regulation (EU) 1831/2015. In order to ensure a common visual identity of EUs own promotion campaigns, beneficiaries of EU funding have to use the signature "Enjoy! It's From Europe".

The fruit and vegetables sector is one of the main beneficiary of this EU policy, with roughly 25% of both the number of projects and requested budget. The EU promotion policy is of high relevance to conduct generic promotion campaigns on the EU Single Market as well as to consolidate or diversify positions on international markets. The budget is increased



annually and will reach €200 million in 2019. The level of co-financing varies according to the type of programme (70% for simple programmes, 80% for multi programmes, and 85% in case of crisis).

The priority actions are set through and annual work programme on the basis of which an annual call for proposal is set. To secure that the priorities for the calls reflect the particularities of the fruit and vegetables sectors, Freshfel has contributed to all the annual work programmes that the European Commission has prepared each year since

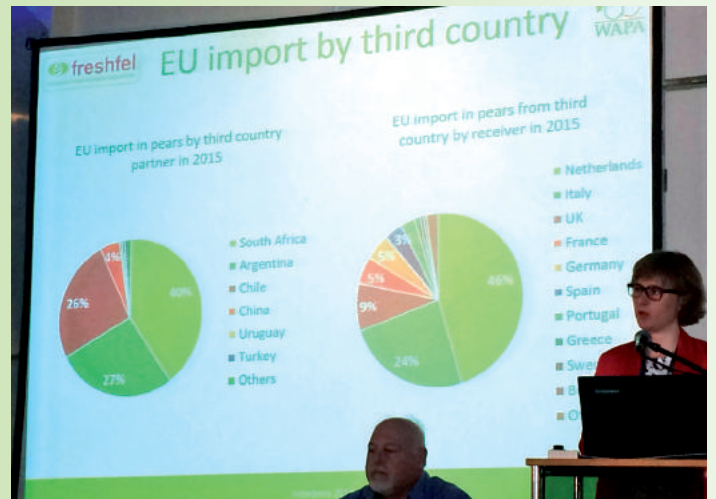
2016. In late 2016 and early 2017, Freshfel called for improvements and increased efficiency. Many achievements could already be reached through a simplification of the annual work programme.

Freshfel advocacy for an improved efficiency of the EU promotion and information policy

- A simplification of the priorities by removing the sub-budget lines to prevent proliferation of projects leading to a heavy workload for applicants and authorities.
- The setting up of broad priorities for the single market and the third countries leading to a sound competition among the projects while securing that only the most rewarded project will be selected.
- A rebalancing of budget with equal share for the single market and third countries market, and giving a better reward to multi programme v. simple programme to enhance the EU added value.
- A positive discrimination in the selection for project relating to the sector that has been the most affected by market disturbances (food scare, embargo, etc.).
- An on-going focus on Commission own procurement initiative programme including high level trade mission with the Commissioner and follow SPS activities to open up new markets.

Consumption of healthy diet on the EU markets needs to be permanently stimulated to boost fresh produce consumption to the minimum recommended by WHO. Besides, as exports to third countries declined by 10% in 2016, further efforts are needed to diversify opportunities on international market. The promotion policy is therefore for the sector a crucial instrument to stimulate both domestic sales and increase the presence of EU fresh produce on international market.





Moving ahead – Building confidence in value and safety of fresh produce

- 1. Encourage competitiveness and the sustainable assets of fruit and vegetables production:** The CAP instruments (which are in a process of simplification and modernisation) as well as other policy and trade instruments should be rebalanced and position fruit and vegetables more vigorously in the diet of European citizens. While being contributing largely to the EU agricultural value, fruit and vegetables are only benefit to 3-5% of the EU agriculture budget. Better rewarding fruit and vegetables will lead to multiple benefits to the European economy, to the environment (given its low carbon, water and ecological footprint) and to the health of Europeans. The upcoming CAP reform is the momentum to rectify policy.
- 2. Seeking coherence of tools:** While the sector is eager to have the right tools for production, many aspects still need to be cleared in the area of plant protection products, but also in regard to contaminants, biocides, food additives, etc., to secure confidence in the legislation and get the benefit of consumer's confidence in industry practices. Besides, the evolution of the plant protection debate, needs to be considered in perspective of other evolving dossiers, including those relating to the plant health reform, climate change, food waste and sustainability as well as microbiological safety. Plant security should be guaranteed, in particular in the frame of the current and new plant health regime. A better understanding among all public and private stakeholders involved in this debate is key to provide efficient rules, secure compliance and confidence while seeking more reciprocity internationally
- 3. Research and innovation:** The sector should build upon a strategic research and innovation agenda elaborated by AREFLH, EUFRIN, EUVRIN and Freshfel to position itself in the Horizon 2020 policy and beyond. Freshfel will continue to be involved in projects, which are relevant for the membership to provide expertise and secure dissemination to the sector at large.
- 4. Enhance trade in an uncertain environment:** 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 strongly challenged to create less burdensome conditions for market access and the sector should explore the benefits and added value that the concept of the Single Entity could entail for our sector. More reciprocity is needed and demanded, while attention should also be kept to secure that in a more global environment, Europe should also remain an attractive market. The sector should also voice its expectation and specificities as the EU-27 will be embarking in its negotiation with the UK for the divorce and future relationship.
- 5. Building an efficient health and nutrition policy:** There is a need for more clarification in EU policies, particularly on health and nutrition. The EU regulation on nutritional and health claims should be adjusted to facilitate claims on fruit and vegetables, but also better protect the image of our sector from misuse by competing agri-food industry who boost their sales based on the positive image of fresh produce. Freshfel's 'Where is the fruit?' study provides evidence why this is necessary! More leadership of public authorities is needed to foster a healthier lifestyle that would address the far reaching implications of the rising obesity and proliferation of non-communicable diseases among the European population. Fruit and vegetables are an important component of any solution to be introduced to remedy to this alarming situation.
- 6. Stimulating consumption:** The latest Freshfel Consumption Monitor gives reasons for a more positive look into the future. While the sector should continue its search for market outlet diversification to increase availability and accessibility, the sector should continue its innovation commitments towards more diversity, increased quality, safety and convenience. Besides, securing the best access to the EU promotion policy for agricultural products (which might require some adjustments to be more efficient) is of paramount importance to stimulate consumption not only on third country markets but on the EU domestic market. The reshaped European School Fruit and Vegetables Scheme (SFS) should also be an instrument that the sector should fully exploit to get the youngest consumers acquainted to taste, texture and quality of the diversity of fresh fruit and vegetables.



Many thanks to the Freshfel Board members for their support to the activities of Freshfel Europe, covering June 2016 to May 2017



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