



Freshfel Europe Activity Report 2019



EUROPEAN FRESH PRODUCE ASSOCIATION

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Activity Report Information

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.

Freshfel Europe's Activity Report is published on an annual basis in advance of the Annual Event. This version covers Freshfel Europe's main activities between July 2018 and June 2019.

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

Not a Freshfel member yet?

A strong organisation can only be built by gaining the support of all stakeholders in the fresh produce supply chain. Freshfel Europe represents the common interest of the European fresh fruit and vegetables supply chain, from actors in production to trade and retail, for the benefit of all consumers.

Freshfel Europe's resources exclusively result from membership fees.

For more information on how to become a Freshfel Europe member go to www.freshfel.org/member/about-membership/



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Foreword from the President

This Activity Report is being released as I end my first year as President of Freshfel Europe. During this time many topics have been addressed by the Association and this Activity Report provides you with an overview of those that have shaped Freshfel Europe's activities over the past 12 months.

Freshfel Europe today is a strong, diverse, member-driven association. Its membership represents all segments of the fresh produce business, from production spreading right to all corners of Europe, to trading partners in wholesale, export and import, and to the retail segment in which I myself am involved.

In October 2018 the Freshfel Europe Board, which represents the whole European fresh fruit and vegetable supply chain, undertook a comprehensive review of current challenges for our sector and prioritized the work of the Association for the coming year. While the sector continues to face the global challenge of climate change amid evolving consumer expectations, increasingly politics is entering the day to day business of the sector.

Today more than ever the growth of unilateralism, populism and protectionism are having an impact on operations throughout the supply chain. Adapting to this fast-changing political environment often driven by irrational decisions is highly complex. US unilateralism showcased through sanctions targeting fruit and vegetables arising from unrelated disputes in conjunction with an unpredictable Brexit which will require rapid short-term solutions are events which may create unnecessary distortions throughout the sector. Both the Russian and Algerian embargoes have demonstrated to us that repositioning the sector to counter restrictions in this uncertain political environment is no easy task.

The European elections in May this year and the subsequent renewal of the European Commission will reshape Europe's leadership. In the upcoming second year of my mandate it will be my priority to reposition the sector in this new political environment. Freshfel Europe and its members will also strive to better position the sector and its products at European level. Nevertheless, our voice at national level across Europe needs to be equally reinforced. I call on everyone in the sector to collectively engage with stakeholders, whether public or private, to boost European fresh fruit and vegetable consumption.

Our sector has a bright future and it is up to us to build it and ensure that other stakeholders also value and realize its potential. Fresh fruit and vegetables have much to offer, especially in contributing to the United Nations Sustainable Development Goals for 2030, both from a health and environmental perspective. We are capitalizing on opportunities to spread this message, such as through Freshfel Europe's new EU-wide promotion campaign, and I encourage you to follow this lead and do the same into this year.



Stephan Weist
Freshfel Europe President

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 European production to various segments of trade including wholesale, import and export, and to retail. 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. 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 fresh 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's Mission:

- 1 To build a strong European fresh fruit and vegetables sector from production to retail.
- 2 Improve the efficiency and competitiveness of the sector.
- 3 Facilitate international trade of fresh produce.
- 4 Assist members to comply with safety, environment and CSR standards.
- 5 Position the sector towards the latest research and innovation findings.
- 6 Enhance opportunities for promotion and information provision of the benefits of fresh produce and share best practices.
- 7 Stimulate consumption of fresh produce.



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The Freshfel Europe Team

Freshfel Europe Board Members



Stephan Weist
President



Salvo Laudani
Vice-President



Marc De Naeyer
Treasurer

François Lafitte
President, Production

Richard Schouten
Vice-President, Production

Francisco Borrás Escriba
President, Export

Marc Peyres
Vice-President, Export

Herbert Scholdei
President, Import

Jean-François Billot
Vice-President, Import

Francisco Contreras
President, Retail

Anders Lind
Vice-President, Retail

Nigel Jenney
President, Convenience, R&I

Frederic Rosseneu
Vice-President, Convenience, R&I

Vincent Dolan
President, Promotion, Communication, Image

Saida Barnat
Vice-President, Promotion, Communication, Image

Andreas Bruegger
President, Food & Plant Safety, Sustainability

Axel Moehrke
Vice-President, Food & Plant Safety, Sustainability

Paolo Prudenziati
President, Bananas

Andre Weichert
Vice-President, Bananas

Jose Antonio Garcia Fernandez
President, Citrus

Jacky Feniello
Vice-President, Citrus

The President and Vice President of Wholesale and Food Service are currently being reappointed.

Freshfel Europe Secretariat



Philippe Binard
General Delegate



Eglé Baecke
Director Food Quality



Nelli Hajdu
Policy Advisor Trade & Communications



Helene Deruwe
Policy Advisor Agriculture and R&I



Nicola Pisano
Communications Manager & Policy Advisor



Natalia Santos-Garcia Bernabe
Policy Advisor Trade & Food Safety



Linda Bloomfield
International Membership & Marketing Support



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Freshfel Europe in EU Decision Making

Freshfel Europe is involved in European level decision making in all policies areas relevant to the European fresh fruit and vegetable sector. Located in Brussels, Belgium the Freshfel Europe Secretariat is best placed at the heart of European policy making to ensure that the interests of the fresh produce sector are well represented. Freshfel Europe members are actively involved in this process and regularly assist the Secretariat in advocacy work on behalf of the general interest of the whole sector.

Freshfel Europe regularly participates in European Commission Civil Dialogue Groups (CDGs) and ad hoc Expert or Stakeholder Groups.

Both the Freshfel Europe Secretariat and members attend these DG AGRI policy meetings, including:

- CDG on Horticulture, Olives & Spirits: Fruits & Vegetables
- CDG on Environment & Climate Change
- CDG on Organic Farming
- CDG on CAP
- CDG on International Aspects of Agriculture
- CDG on Quality and Promotion
- CDG on EU School Fruit, Vegetables and Milk Scheme

Freshfel Europe is actively involved in the Group of Experts for apples and pears, citrus, peaches and nectarines and tomatoes.

Freshfel Europe will also be involved in the Market Observatory for Fruit and Vegetables.

This new Market Observatory contributes to the European Commission's initiative to improve market transparency and will provide business development perspectives and market developments.

Beyond these activities with DG AGRI, Freshfel Europe is actively involved in the different DG TRADE Market Access and SPS Committees. Freshfel also takes part in the DG SANTE Advisory Committee for the Food Chain as well as DG SANTE led EU platforms established to foster dialogue between stakeholders and the European Commission to better develop effective policy and guide European action and initiatives.

- EU Platform for Action on Diet, Physical Activity: Freshfel Europe is an active member with three commitments including the Fresh Times, Consumption Monitor and #FruitVeg4You social media campaign.
- EU Health Policy Platform: Freshfel Europe has been a member since 2018 and coordinates a Stakeholder Network on stimulating fresh fruit and vegetable consumption.
- EU Platform on Food Losses and Food Waste: Freshfel Europe has been a member since its establishment in 2016 where EU level discussions take place on the prevention of food loss and food waste.

Freshfel Europe is also involved in consultations with DG TAXUD, and beyond Brussels Freshfel Europe keeps in close contact with UNECE, WHO, FAO, OECD and WTO.



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Freshfel Europe is Future-proofing Fresh Produce

Freshfel Europe is committed to ensuring that the European fresh produce sector continues to be at the forefront of sustainability. While the fresh fruit and vegetable sector comprises of products with a low environmental impact and high consumption recommendations, Freshfel Europe ensures that the sector is future-proofed and continues to not only meet current but also future sustainability expectations and demands.

Freshfel Europe provides support to its members to facilitate sustainable supply chains in the European fruit and vegetable sector, from producer right through to consumer level. This encompasses work on a large variety of topics, which are part of Freshfel Europe's daily work. This includes but is not limited to trade, food safety, environment, health, promotion and research and innovation.

The UN's 2030 Sustainable Development Goals are driving global sustainability action at all levels of society and business. Freshfel Europe is ensuring that these international goals are being met at Member State and European level in the fresh produce sector to enable positive systemic change across industry for a more sustainable future.



Sustainable Fresh Produce

Throughout 2018-2019 sustainability was a fundamental theme in policy development at European level and remains set to do so into the future. Implementation of the UN's global 2030 Sustainable Development Goals is being driven by the European Commission in all policy areas to modernise the economy, protect the environment and generate sustainable growth in Europe and beyond. In May 2019 the European Commission released their report on implementation progress of the 54 actions under its Circular Economy Action Plan, which was launched in 2015, and all actions are either being implemented or are delivered.

Freshfel Europe is ensuring that sustainability is being achieved throughout the European fresh produce sector supply chain. In December 2018 Freshfel Europe held its third annual Sustainability Working Group to keep members abreast of sustainability policy developments and emerging member initiatives and concerns. EuroCommerce and Global G.A.P representatives were both invited to give presentations on their latest initiatives in the fresh produce sector and social compliance, labelling, biodiversity and sustainable use of pesticides were all high on the agenda.

Significant focus during the Sustainability Working Group was given to discussion on the European Commission proposal for a Directive on the reduction of the impact of certain plastic products on the environment. With final adoption of the Directive expected this year, Freshfel Europe followed the developments of this highly politicised legislation closely to monitor any direct and indirect consequences for the fruit and vegetable sector, including close liaison with members and European plastic product organisations.

As a Platform member, Freshfel Europe attended all meetings of the EU Platform on Food Losses and Food Waste providing members with updates on Platform discussions and gathering member input from actors in the supply chain for Platform initiatives, such as food waste measurement methodology legislation. In this respect, Freshfel Europe is also following the development of the UNECE's proposal for a Code of Good Practice for reducing losses in fruit and vegetable trade.

Freshfel Europe has continued to be an Observer member of coolingEU, a forum promoting a more efficient and cleaner cooling supply chain across Europe and has continued to take part in the SUSFANS project's stakeholder workshops, a project aligning EU nutritional health and food production, which has now concluded.

Freshfel Europe has been actively participating in the organic policy debate. In June 2018 the EU institutions voted in favour of a reform of the rules for the production, certification, labelling and trade of organic products. This new Regulation will enter into force on 1 January 2021, but before that the legislation needs to be further defined via secondary legislation. Freshfel Europe has transmitted the concerns and questions of its members regarding this new Regulation to the relevant policy makers via meetings and through participation to the Civil Dialogue Group on Organic Farming. In the upcoming years Freshfel Europe will continue to monitor the developments in the drafting of this secondary legislation.

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Confidence in Food Quality and Safety

Securing consumer confidence is essential in the fresh fruit and vegetable sector. Besides the undisputed healthy assets of fresh produce a number of issues need to be closely monitored to secure consumer confidence with regards to food safety. Monitoring of existing and changing legislative requirements on active substances and maximum residue levels, microbiological risks, food additives, biocidal products, fertilizers, sanitizers and contaminants is crucial in the daily work of the Freshfel Europe Secretariat and its members.

Matters relating to food safety and quality are discussed at the biannual Freshfel Europe Food Quality Working Group meetings.

This Working Group brings together more than 30 experts from different layers of the supply chain and is a unique forum to exchange information about quality and safety issues. The core activity of the Working Group is to look at matters around plant protection products and their residues. During the meetings Freshfel Europe members learn about and discuss the most recent policy developments in food quality and safety. The Working Group also examines contaminants, food additives, biocidal products, marketing standards, labelling requirements as well as other topics described in more detail in this report such as plant health and research and innovation projects.

The ongoing re-evaluation (REFIT) of the European food safety legislative framework will provide an 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.

Together with its members Freshfel Europe seeks to improve European legislation while ensuring a high-level of consumer protection.

Freshfel Europe is additionally actively involved in the activities of the Agri-food Chain Roundtable for Plant Protection. The Agri-food Chain Roundtable for Plant Protection brings together more than 20 Brussels-based associations and allows them to take positions on common issues such as minor uses and speciality crops.

Freshfel Europe aims for full compliance with European legislation on food quality and safety, while minimising the use of plant protection products (PPPs) and moving towards better agricultural practices. The high level of MRL compliance throughout the industry confirms the steps undertaken by the fresh produce sector in this area. Freshfel Europe advocates that plant protection policy should be developed with a holistic approach and be coherent with other policy priorities. All plant protection dossiers have to be seen in their broader context and be coherent with other policy priorities such as food waste, plant health requirements, climate change & new breeding techniques. A holistic and coherent approach is needed and Freshfel Europe is working towards this goal.



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Changing Plant Health Requirements

2018 has been a crucial year for the shaping of the future European plant health regime. During this time several pieces of legislation of high relevance for fresh fruit and vegetable imports have been drafted and adopted. Throughout this process Freshfel Europe has profiled itself as a key interlocutor between the fresh produce sector and the European Commission services in charge of plant health dossiers.

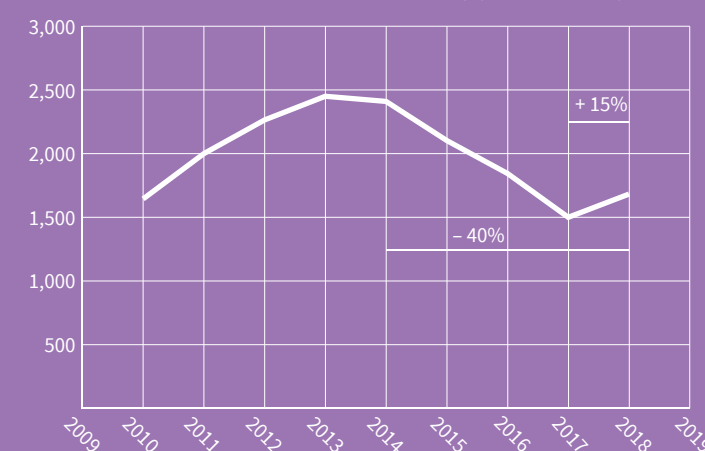
Freshfel Europe in close coordination with its members has actively participated in the discussions leading to the drafting of the so-called 'high risk' list of plant products, successfully arguing for a balanced, science-based approach as a basis for this new instrument. Freshfel Europe has also supported the European Commission's work in the revision of Annexes I to V of the Council Directive 2000/29/EC, which introduces new requirements to avoid the introduction of harmful organisms into the European Union. In these two policy developments Freshfel Europe supported its views in written form through the European Commission's public consultations and by its active participation in DG SANTE's Advisory Groups on the Food Chain and Animal and Plant Health.

Freshfel Europe has maintained regular bilateral contact with the European Commission services to acquire a comprehensive understanding of other upcoming pieces of legislation and their impact for the sector, including the new emergency measures in relation to the fall armyworm and the renewal of safeguard measures to prevent the introduction of citrus black spot into

the European Union via imports. Freshfel Europe is in continual contact with its members to secure the greatest level of compliance with these changing regulatory requirements.

In parallel to these developments Freshfel Europe is closely following trends in interceptions of harmful organisms into Europe, and is an active member of the European Commission's expert group on 'Plant Health Awareness Raising'. Furthermore Freshfel Europe continues to advocate for the development of an enhanced Europhyt system allowing for faster and more detailed reporting of interceptions. Such a tool would be of great help to the sector to better mitigate the introduction of new pests and diseases.

Evolution of HO interceptions by year (Europhyt)



2018 Europhyt interceptions – Origin Hotspot



Research and Innovation

Research and innovation in the fresh fruit and vegetable sector is essential to keep the industry competitive. For many years Freshfel Europe and AREFLH have coordinated the Task Force for Fruit and Vegetable Related Research and Innovation. In 2018 the Task Force organised a conference on the priorities for fruit and vegetable research to discuss the needs of the sector and to give an overview of the latest research and innovation projects executed.

The aim of the conference was to connect representatives of the whole supply chain with researchers from European research centres and university departments as well as policy makers from the European institutions. This dialogue was essential to counter the trend of broadening the scope of research to agricultural products at large as some research needs are very specific to the fresh produce sector or even to a specific fruit or vegetable.

In 2018 Freshfel Europe continued to be actively involved in two research and innovation projects. These projects were funded by the EU's Framework Programme for Research and Innovation, Horizon 2020.

Freshfel Europe's involvement as disseminator in these university and research centre-led projects is important to keep the finger on the pulse of developments in horticultural research and the needs of the sector.

EUFRUIT

The EUFRUIT thematic network, consisting of 21 partners from 12 European countries, was launched in March 2016 with the aim to improve the implementation of research outcomes into practical and applicable knowledge that directly benefits the European fruit sector. The consortium developed a framework for identifying and exchanging knowledge via the EUFRUIT project and its Knowledge Platform, in which all the current research efforts of the partners were gathered. The information was compiled along four different themes: 1) Performance of new fruit varieties, 2) Reduction in pesticide residues, 3) Fruit quality - Improvement of fruit handling/storage, and 4) Secure sustainable fruit production. EUFRUIT ended in March 2019.

EUROMIX

Every day we are exposed to a mixture of multiple chemicals. The EuroMix project delivered a mixture test strategy and test instruments to test mixtures of multiple chemicals on health and environment. These tests resulted in data necessary for refining future risk assessment of mixtures relevant to national food safety authorities, public health institutes, the European Food Safety Authority (EFSA), the European Chemical Agency (ECHA), industry, regulatory bodies and other stakeholders. EuroMix ended in May 2019.

Freshfel Europe is currently a member of several consortia that submitted project proposals to the European Commission. If these proposals are successfully selected for funding they will kick off in 2020. All the proposals Freshfel Europe is part of focus on matters of high relevance to the sector, such as food and plant safety and sustainable production methods.



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Improving Trade & Market Access

To continue to enhance the diversification of European fresh fruit and vegetable exports, Freshfel Europe is increasing its efforts to tackle sanitary and phytosanitary (SPS) issues and promote market access in close cooperation with its members.

On the offensive front Freshfel Europe maintains the need for reciprocity in free trade negotiations in its contact with the European Commission services, including at the highest level in encounters with EU Commissioners. In particular Freshfel Europe advocates for stronger SPS provisions in new EU free trade agreements. This could encompass removing preclearance, adding clear timelines for the completion of protocols and by using the momentum of trade talks to push for the finalisation of Member States' pending applications. Freshfel Europe also advocates for stronger synergies among applications under a European umbrella to secure similar market access conditions for similar growing conditions and issues among Member States. The EU should urge third countries to clearly identify their concerns and allow EU exporters to take the necessary mitigation measures to comply with their requirements, mimicking the process that exporting countries encounter when shipping to the EU.

Freshfel is involved in European Commission initiatives to promote agri-food exports in key markets. In 2018 this included the participation of Freshfel Europe and its members in Commissioner Hogan's High Level Missions to South Korea, Iran and Japan. Additionally, within the framework of the new EU Foreign Partnership Instrument (FPI) Freshfel Europe has been involved in the EU-Canada initiative to promote the phase out of methyl bromide fumigation allowing for better access of fruit and vegetable into the Canadian market. Discussions are also ongoing with the European Commission services to ensure that fresh produce features in upcoming FPI projects, notably in priority markets in Asia.

On the defensive front Freshfel Europe has closely followed EU-USA trade talks and threats over the imposition of sanctions as well as the worrying situation of the Mediterranean basin, notably the closure of the Algerian market. The reasons behind these developments remain highly political beyond our sector and Freshfel Europe continues to campaign for European fresh fruit and vegetables to remain out of the scope of these disputes.

China remained a key topic on Freshfel Europe's market access agenda. On the 18-19 November 2018 the 3rd round of the common workshop between Freshfel Europe and the Chinese Inspection and Quarantine Association (CIQA) in the framework of the China Fruit and Vegetable Fair took place in Beijing. The workshop gave Freshfel Europe's members the possibility to discuss and exchange market access modalities for European fruit and vegetables and to build understanding of the Chinese market. The workshop was accompanied by a side-meeting with the EU Delegation and Member State representatives to discuss the upcoming steps for an improved market access situation and better cooperation among Member States. Freshfel Europe will continue cooperation with CIQA and has identified three key priorities for 2019:

- 1 Building a guidance document for the delegation on commonalities in market access negotiations.
- 2 Reinforcing cooperation with DG TRADE, DG SANTE, DG AGRI and Member States' National Plant Protection Organisations to allow discussions held with Chinese counterparts to be up scaled.
- 3 Improved and continued contact with CIQA throughout the entire year. The next workshop will take place in November 2019.





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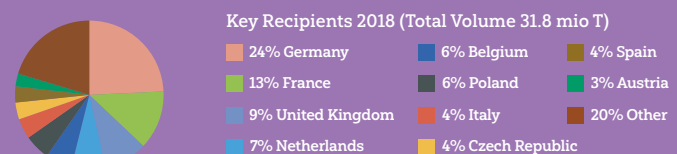
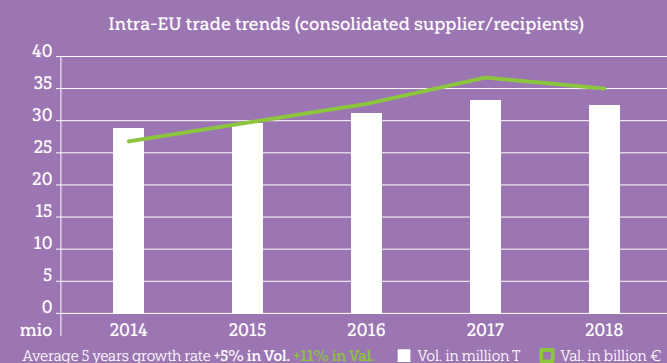
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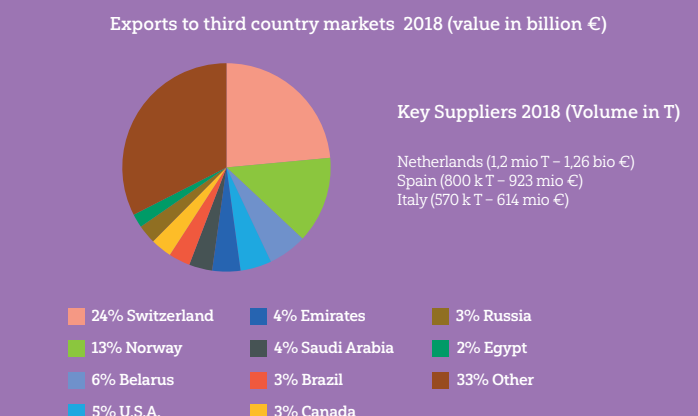
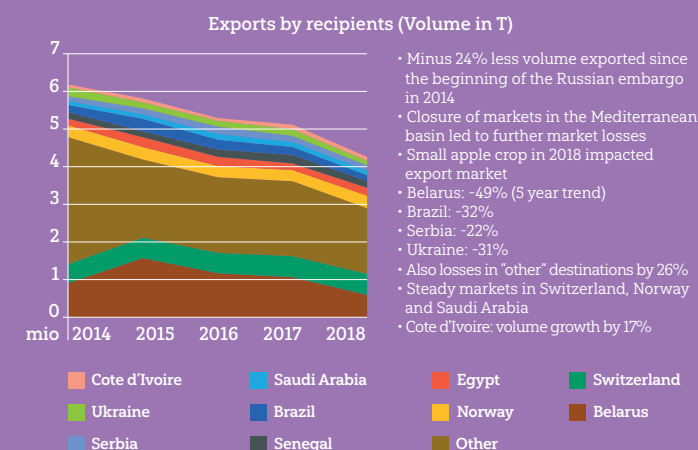
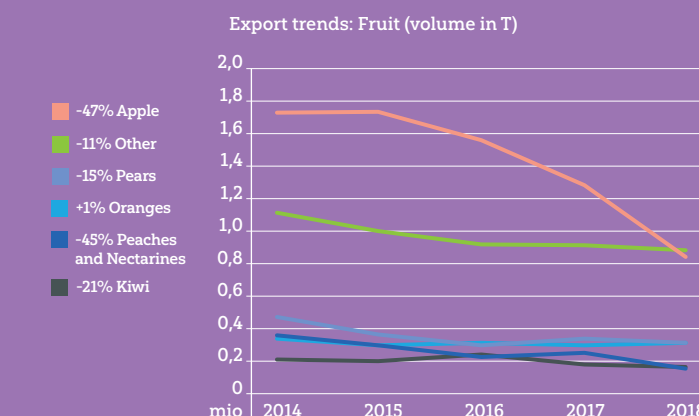
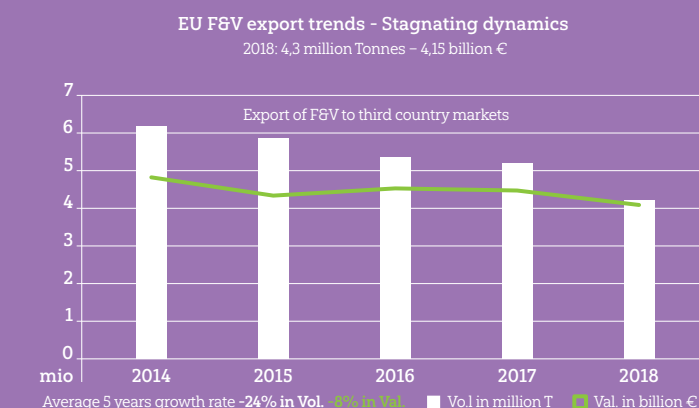
European Trade Trends

Intra-EU trade: Steady growth ahead

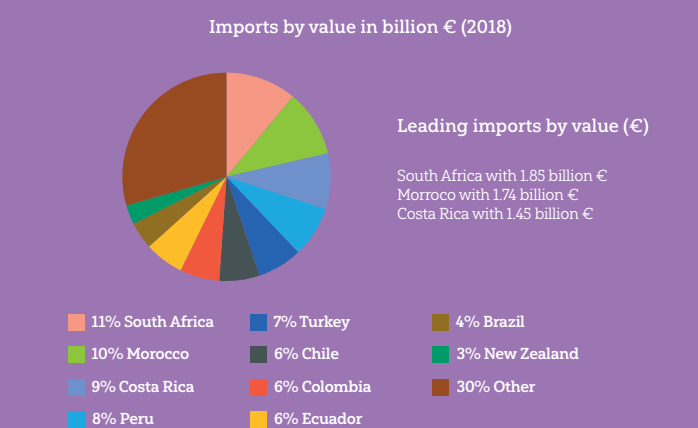
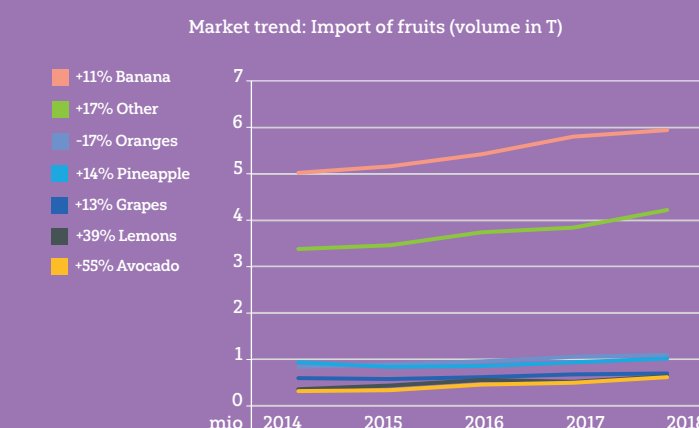
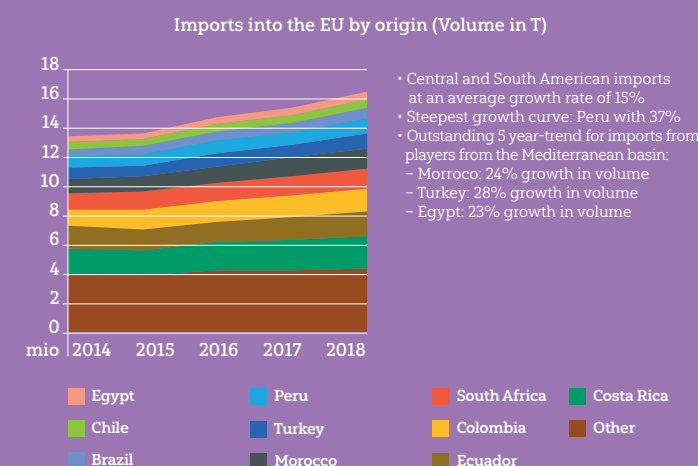
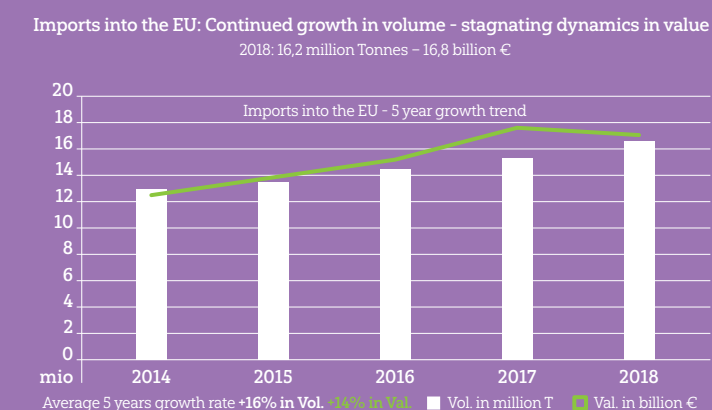


Total EU Intra trade 2018 in T	31,812,544
Total Fruit	18,677,545
Total Vegetables	13,134,999
From which:	
Bananas	2,905,931
Tomatoes	2,467,314
Apples	2,174,443
Oranges	2,089,116
Onions	1,485,202
Watermelons	1,394,807
Capsicum	1,308,913
Cucumbers	1,241,755
Peaches and nectarines	1,131,669
Carrots	1,060,895
Table grapes	1,023,368
Clementines	913,710
Lemons	912,661
Pears	855,931
Melons	644,204
Cauliflowers	551,343
Cabbage	545,209
Lettuce	541,803
Kiwifruit	528,695
Pineapples	495,150

EU F&V export trends - Stagnating dynamics in the export market



EU F&V import trends - Positive trend continues



A New Era of Trade Facilitation & Digitalization

In 2018 Freshfel Europe continued to participate in key debates on EU-wide and global trade facilitation efforts, in particular digitization of border control operations to gain the most out of this global momentum for the fresh fruit and vegetable sector.

In particular the EU, a key driver of the conclusion of the WTO Trade Facilitation agreement, has continued its internal revision of customs and control policies. Part of this process is to continue the development of a common Single Window environment to implement all trade facilitating aspects of the Union Customs Code (952/2013) in the upcoming five years and to closer connect the Single Window to phytosanitary control operations. Freshfel Europe has delivered specific input to the European Commission on the transition of the EUR.1 certifications into the REX system as well as the future design of Centralized Customs Clearance operations.

Freshfel Europe has been actively following the reform of the Official Control Legislation (2017/625). At the heart of the reform is the integration of paper certificates into the digital environment of TRACES. In close exchange with DG SANTE, Freshfel Europe contributed to the discussion on the development of the Common Health Entry Document CHED-PP, a new document to be handled by fruit and vegetable traders from the 14 December 2019, and closely monitored discussions on the implementation of electronic phytosanitary certificates. Key topics include ensuring the proportionality of information to be included into new documents, and preparedness of trade until the implementation of the new system.

Given the new approach to improve perishable value chains, Freshfel Europe is continuing its learning experience by participating in projects beyond Europe's borders. In addition to participating in IPPC's ePhyto project, Freshfel Europe has joined a project organised by the International Trade Centre and the German Development Cooperation agency GIZ. This project aims to support vegetable traders in the Balkan area to address and lift trade barriers for vegetable trade at border crossing points and to support the endeavours to harmonize the local regulatory environment with EU food safety regulation.

Over the past few months Freshfel Europe has investigated the current regulatory environment and commercial state of play of online sales of fresh fruit and vegetables. Freshfel Europe presented developments in this area at the 32nd International Meeting of Quality Control Fruit and Vegetables in Bonn. This event marked the beginning of renewed work in online sales especially in regards to creating European and globally valid standards for fresh fruit and vegetable online sales together with leading institutions such as the UNECE and OECD.

In 2019 Freshfel Europe is committed to providing support and expertise in the area of digitalization and trade to its members. Freshfel Europe will also intensify its efforts on standardization of procedures and SPS and food safety aspects for fruit and vegetable trade with international organisations to ensure beneficial long term outcomes in market access negotiations.



The Uncertainty of Brexit

Despite Brexit uncertainties in 2018 the EU27 exported more than 3.2 million tonnes of fresh fruit and vegetables to the UK market, representing around 40% of the UK's total supply. However, the risk of a 'no-deal Brexit' still casts a shadow over the future of these trade flows, especially given the extra costs and delays that new border checks and customs procedures could create for imports of perishables into the UK. In the medium and long term Brexit could also lead to challenges due to a progressive divergence in regulatory standards and operators used to working within the Single Market facing new administrative burdens.

Given the importance of the British market for European fruit and vegetable operators and the uncertainty of the future trading relationship Freshfel Europe has been active on a number of fronts:

- Close monitoring of negotiations, preparedness and contingency planning. Freshfel Europe has held meetings with key actors, including the Article 50 Taskforce of the EU Commission, the EU Preparedness Team and Member States representatives as well as with UK authorities. Freshfel Europe is actively participating in the European Commission's preparedness meetings with business associations in a number of areas, such as customs and SPS issues.

- Freshfel Europe is continuously exchanging information on potential future scenarios with its members and raising awareness of the importance of establishing EU-wide preparedness and contingency planning specific to the sector. Freshfel Europe works on this dossier in close coordination with its UK member, the Fresh Produce Consortium.
- Freshfel Europe has steered the development and dissemination of a common sector position. This was done through a Working Paper outlining the key challenges for the sector in a worst case scenario. In its exchanges with authorities and the wider public, Freshfel Europe continues to advocate for minimum trade disruptions and predictability as key priorities for the sector, whatever form Brexit may take. This could be ensured by a zero tariff or quota arrangement between the EU and the UK, close regulatory alignment, and the development of fast-track import procedures facilitated by digitalization.

Better Functioning of the Supply Chain

In recent years the functioning of the supply chain has increasingly gained political attention with calls for more transparency within the chain and for EU-wide legislation to deal with unfair trading practices (UTPs) between upstream and downstream actors. Freshfel Europe has actively participated in the debate on UTPs and market transparency, clearly outlining the needs of the fresh fruit and vegetable supply chain via position papers, responses to public consultations, meetings with policy makers, and several workshops on the functioning of the agri-food supply chain. Freshfel Europe's position is unique in that it represents the point of view of the complete supply chain. Therefore its position implied that it was possible to find a compromise between all actors in the chain and that the fruit and vegetable sector is in general a well-functioning chain, partially due to consistent dialogue between all segments of the chain.

Freshfel Europe supports the European Commission's efforts towards greater transparency of the supply chain and provision of instruments to have better access to production and trade trends. This has been achieved through participation along with its members in the Groups of Experts product meetings and application to be part of the new Market Observatory for Fruit and Vegetables. In addition to this, Freshfel Europe's Qlikview tool available to its members is a well valued tool to follow market developments. Freshfel Europe continues to communicate to the European Commission that supply and demand of fresh produce is affected by climatic conditions which impact the diversity of products and varieties available as well as their quality and packaging.

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Fruit and vegetable consumption levels across most of the EU Member States remain well below the minimum recommended level of 400g per capita per day by the World Health Organisation. To tackle these low consumption levels Freshfel Europe together with Aprifel, the French Agency for Research and Information on Fruit and Vegetables, launched a campaign on the health benefits of eating fruit and vegetables, in the framework of CHAFAEA's information provision and promotion measures for agricultural products.

Europe's low fruit and vegetable consumption is particularly noticeable among 18-30 year olds, where studies have found that young adults have the lowest consumption compared to all other age groups. European young adults aged between 18-30 years have a weak awareness of the importance of consuming fruit and vegetables throughout their life as part of a healthy diet; increasing this awareness is the first step in changing consumption habits.

The main objective of the programme is to increase awareness of 1.5 million European young adults aged between 18 to 30 years in the European Union of the importance of consuming a diversity of EU fruit and vegetables in their daily diet to at least the minimum recommended by the WHO of 400g per day over a three-year period between 2019-2021. The selected target audience represents a critical turning point during which adapting eating habits to changing lifestyles is essential to taking full control of one's diet.

The overall theme of the campaign will be to invite our audience to take part to eat at least 400g of fruit and vegetables per day via the tagline 'Are you up to the 400g challenge?'

Young adults, commonly known as 'millennials', will be reached via social media channels (YouTube, Instagram, Facebook and Twitter) and through high profile European social media influencers to which the target group subscribes, taking into account the diversity of this age group. Millennials are hyper-connected and consume a high amount of video content. Hence, the campaign will spread its messages via the slogan 'Follow me to be Healthy, with Europe' mainly virtually via monthly videos, infographics and tips disseminated via the influencers' social media accounts, and on the ground during events in France with flyers, goodies and activities. All messages will be passed on via engaging, inspirational and eye-catching phrases.



Focusing on Fresh Produce Promotion

European promotion policy resulting from Regulation (EU) No 1144/2014 remains a highly relevant topic for the fresh fruit and vegetables sector to better position itself in a very competitive food environment. The sector is one of the main beneficiaries of this policy, both in the number of projects and in total budget awarded. The total budget for action on promotion and information for agriculture products now amounts to €191 million with an additional €9 million for the European Commission's own activities, including High Level Missions for business delegations, EU stands at trade fairs around the world and social media campaigns in targeted non-EU markets.

To secure that policy best matches the priorities of the sector every year Freshfel Europe provides a contribution to the Annual Work Programme (AWP). One of the main achievements of this work in the 2018 AWP was the inclusion of a dedicated line to support a healthy diet rich in fresh fruit and vegetables. In 2018 this budget line was fully used by projects from across Europe, which are now being implemented in the period 2019 to 2021. Freshfel Europe applied for a project with one of its members Aprifel in this budget line and was successful in its application for the project called 'FV for a Healthy EU'. A dedicated page on the project can be found on page 29 of this report. In 2019 and 2020 AWP Freshfel Europe has advocated for the continuation of this specific budget line.

Freshfel Europe along with its members is also looking at aspects of legislation that could be improved to enhance the quality and flexibility of the programme. This includes: broadening of topics, rationalization of budget lines focusing on third country markets, a better balanced budget between the EU internal market and third countries, the lack of attractiveness of multi programmes in third countries, discrepancies of conditions between simple programmes with Member States and multi programmes with CHAFEA and branding issues.

To advocate this holistic perspective Freshfel Europe's General Delegate Philippe Binard was a panellist in one of the panel discussions during the European Commission's 2019 Info Day on Promotion, which took place in Brussels in February 2019. Freshfel Europe is also continuously present in the European Commission CDG on Quality and Promotion in order to campaign its position. In 2018 Ms. Simona Rubbi (CSO) was appointed Vice Chair of the CDG representing Freshfel Europe.



Freshfel Europe's Thematic Network

In January 2018 Freshfel Europe was selected to lead a European Commission Thematic Network on the topic of "Stimulating fresh fruit and vegetable consumption for healthier European consumers".

This Thematic Network was part of the European Commission's EU Health Policy Platform's annual activities, which includes the development of four Thematic Networks on priority health topics. Freshfel Europe's Thematic Network was the first ever selected Thematic Network on a food topic.

As a year-long project, the objective of the Thematic Network was to act as a platform for sharing information, knowledge and best practices targeted at increasing consumption amongst those groups whose consumption of fresh fruit and vegetables is low throughout Europe. Under the European Commission's Thematic Network work programme, Freshfel Europe developed a Thematic Network Joint Statement addressing this challenge of how to increase fruit and vegetable consumption throughout Europe.

Freshfel Europe developed the Joint Statement over the course of the year in collaboration with other public and private health and agri-food stakeholders. This included public health, retail,

global health and consumer organisations. Discussion on the topic was carried out through two public webinars in 2018 and supported by the Thematic Network's online area on the EU Health Policy Platform. Many bilateral meetings between Freshfel Europe and European level stakeholders were also held to formulate the Joint Statement Content.

The Thematic Network Joint Statement was developed in two parts, a Framing Paper and a Recommendations Paper. The Framing Paper contextualised European fresh fruit and vegetable consumption. This included explaining the link between fresh fruit and vegetables and health, current fresh fruit and vegetable consumption trends and what should be achieved for healthier European consumers. The Recommendations Paper then illustrated recommendations for future action at all levels and parts of society on ways to stimulate fresh fruit and vegetable consumption across the EU. 43 recommendations were outlined in the Recommendations Paper categorised under five different types of action, cooperative action, social action, economic action, environmental action and communication action. These recommendations provide a holistic perspective to future work needed to stimulate consumption. Where possible, recommendations were supported by good practices, demonstrating where similar successful initiatives had already taken place for inspiration and guidance on how recommendations could work in practice.

The final Thematic Network Joint Statement was presented at the annual meeting of the EU Health Policy Platform in November 2018 to the European Commission and other members of the Platform. Following this until April 2019, the Thematic Network Joint Statement was open for endorsement by other stakeholders. In total 42 organisations and companies officially endorsed the Joint Statement giving their support and backing of the recommendations outlined in the Joint Statement.

The Thematic Network now has its own Stakeholder Network area on the EU Policy Platform, where the Thematic Network Joint Statement and infographic are available for download. Other resources and discussion documents are also available here.

Visit the Stakeholder Network at <https://webgate.ec.europa.eu/hpf/>

Become a Freshfel Europe Member

As the single representative Association of the fresh produce sector at EU level, Freshfel Europe's main objective is to ensure the interests of the sector are well represented in European policy making. Accordingly, Freshfel Europe works closely with the European Commission, European Parliament, European Council and Member State representatives in its daily policy work and has continual contact with its members to respond to their emerging needs and interests.

Freshfel Europe publishes press releases and position papers on a wide range of pertinent issues and is frequently involved in consultations to make the views of the sector heard on policy priorities. Freshfel Europe hosts active social media accounts on Twitter, Facebook and LinkedIn using @Freshfel, where it further publicises the views of the fresh produce sector.

Freshfel Europe is the forum for the European fruit and vegetable sector and acts as a platform for constructive dialogue between members from production down to retail on priority challenges. Freshfel Europe holds meetings with its members for discussions and to foster cohesion on key industry topics to strengthen the sector. In addition to providing an opportunity to build collective and strong positions taking into account the whole supply chain, Freshfel Europe's meetings also act as a networking event to facilitate mutual understanding between actors in the sector.

Internally Freshfel Europe members have access to Freshfel Europe's intranet site, where all internal discussions and outcomes are stored. This includes Freshfel Europe's:

- Weekly newsletter: outlining policy progress and information on the Association's activities and developments in the sector.
- Press Review: weekly online paper covering EU and international fresh produce news.
- Freshfel intra EU trade as well as import and export data by product and country.
- Consumption Monitor: annual publication giving an overview of European fruit and vegetable consumption levels.

Freshfel Europe's website, www.freshfel.org, provides information about Freshfel Europe as well as the Association's latest publications and press releases. The website also hosts Freshfel Europe's:

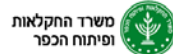
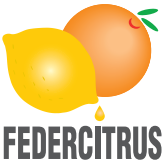
- Headlines: bimonthly publication outlining Freshfel Europe's key activities and positions.
- Fresh Times: bimonthly publication showcasing best practice examples of the sector's promotion initiatives on fruit and vegetable consumption.
- Projects: all information about projects in which Freshfel Europe is involved.

If you would like to become a Freshfel Europe member go to www.freshfel.org/member/about-membership/ for membership information and application form.

Alternatively get in contact with the Freshfel Secretariat at info@freshfel.org who can provide you with tailored information and advice.

Freshfel Europe Members & Associated Members







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