

Activity Report 2021



CELEBRATING

Freshfel Europe's 20th Anniversary and
The International Year of Fruits and Vegetables



Activity Report 2021

General information

Welcome to the Freshfel Europe Activity Report. Published on an annual basis for the Annual Event, this report provides a general overview about Freshfel Europe, its structure as well as a review of topics pertinent to Freshfel Europe's members.

The work of Freshfel Europe 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 and the Secretariat staff. Finally, the support of Freshfel Europe's sponsors has been fundamental in making the publication of this annual report possible.

Membership-driven

A strong organisation is built by through the support of all stakeholders in the fresh produce supply chain. Freshfel Europe is a membership-driven association and Freshfel Europe's resources exclusively result from membership fees. All companies and associations of the European fruit and vegetables sector are invited to join forces with Freshfel Europe for a mutual win-win benefit.

"I would like to thank all members and associated members for their continued support in helping Freshfel Europe to represent the common interests of the entire European fresh fruit and vegetables supply chain for the benefit of all stakeholders and consumers."

Philippe Binard
General Delegate,
Freshfel Europe





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Behind a great company,
there are always
great people.



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We work together as one to bring the finest produce from the farm to the table.

This team effort has enabled us to become Spain's leading fruit, vegetable and salad

stuff producer. We have the capacity to offer a wide range of **Spanish-grown fruit and vegetables** all year round.

A brand's reputation is forged thanks to the people behind it.



Foreword

This Activity Report, covering the period June 2020 to June 2021, provides an in depth overview of the work of the Association over the past 12 months. It also celebrates the continuous efforts of Freshfel Europe to best serve the interest of the European fresh produce supply chain from production down to retail.

This Activity Report documents a period of unprecedented uncertainty and change, which has required the fresh produce sector to adapt to multiple challenges from the COVID-19 pandemic and the new policy ambition linked to the European Green Deal and its Farm to Fork Strategy. Beyond these insecurities of changes, there continue to be multiples opportunities for fresh produce. It is up to the sector and Freshfel Europe to seize these opportunities from emerging and fast moving changing consumers habits.

During this time and more than ever, it was important for the sector to rely on a strong, diverse, member-driven association. For all these complex developments, the Association was an asset to best defend the interests of the sector taking into account its diversity of concerns through Freshfel Europe's membership, which 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.

During these 12 months, I have steered the Association with an approach to act collectively and speak from one voice, seeking common solutions and positions that work for all. The Association has adapted its working method, working closer and closer with its members through webinars to replace physical meetings. This has allowed

the membership to be involved in all the important policy changes on the CAP, food and plant safety, international trade, and all the complex matters relating to environmental, social and economic sustainability. These topics are reviewed in this report. The professional and operational approach and positions adopted by the Association contributed to Freshfel Europe being able to strongly voice the interest and needs of the sector and reinforce the position of the fruit and vegetable category in the agri-food environment and towards consumers. I invite all the members to continue to support the work of the Association and of the Freshfel Europe Secretariat in the coming months.

We have an incredible momentum ahead of us to increase value for the sector by building on the health and environmental assets of fresh fruit and vegetables. We have also a unique opportunity to promote consumption towards the WHO minimum recommendation of 400g per capita per day across the European Union. The Farm to Fork Strategy should drive policy towards a more plant-based diet while the International Year of Fruits and Vegetables 2021 gives us the chance to “#SpeakUp4FruitVeg”.

“I am confident that after demonstrating its resilience during the COVID-19 pandemic, the sector will now demonstrate its capacity to adapt and grasp the opportunities ahead of us.”

Stephan Weist
President, Freshfel Europe





EUROPEAN APPLES: Natural goodness from the Italian Alps

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About Freshfel Europe

Who we are

Freshfel Europe, the European Fresh Produce Association, is the forum for the fresh fruit and vegetable supply chain in Europe and beyond.

Founded in 2001 consolidating organisations dating from the 1960s, Freshfel Europe has a vertical membership structure with members from across the entire supply chain in Europe, including producers, traders, wholesalers, importers and exporters, logistics providers and retailers. Freshfel Europe is a non-profit association under Belgian Law and is registered in the EU Transparency Register.

What we do

Freshfel Europe is in continual contact with its members and the European institutions, ensuring that the European fresh fruit and vegetable sector and its interests are well-represented and have a strong voice in Europe and globally.

Freshfel Europe ensures the European fresh fruit and vegetable sector is dynamic, supplying healthy products using the highest quality, safety,

environmental and social standards to meet consumers' changing needs.

Our Mission

Europe is the global leader in the fresh fruit and vegetable industry and Freshfel Europe's mission is to:

- Build a strong European fresh fruit and vegetable sector from production to retail.
- Improve the efficiency and competitiveness of the sector.
- Create the highest safety and environmental standards for fresh produce.
- Facilitate intra-EU and international trade of fresh produce.
- Advance research and innovation in fresh produce.
- Promote the benefits of consuming fresh produce for health and the environment.
- Stimulate fresh fruit and vegetable consumption.





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The Freshfel Europe Team

Freshfel Europe Board Members

The Freshfel Europe Board governs the Association. The Freshfel Europe Board includes an elected President, Vice-President and Treasurer on a two-year term. The Board is assisted in its deliberations by several appointed representatives of the membership representing the various segments and business aspects of the supply chain from production down to retail. These representatives also take responsibility to guide the Secretariat and steer the work of the different Divisions and Committees of Freshfel Europe. Freshfel Europe's Divisions and Committees cover specific segments of the supply chain as well as pertinent horizontal focus areas for the Association's work.

Freshfel Europe operates in an open manner and

coordinates regular meetings with its members and associated members on topical and emerging issues. This flexibility allows the Association to quickly respond to the rapidly changing and evolving fresh produce market. **Freshfel Europe is highly active in both the European and international policy arenas and conducts meetings with institutions and other stakeholders to ensure the sector's interests are well represented.**

Freshfel Europe Secretariat

The Freshfel Europe Secretariat is based in Brussels, Belgium, the heart of European policy-making. The Secretariat, presided over by Freshfel Europe's General Delegate is composed of policy experts who guide Freshfel Europe's policy work with its members and represent the Association in its external activities.



Philippe Binard
General
Delegate



Eglé Baecke
Director,
Food Quality



Nelli Hajdu
Director,
Trade Policy &
Business Development



Nicola Pisano
Director, Sustainability,
Health & Nutrition,
Communications Manager



Natalia Santos-Garcia Bernabe
Director,
Trade & Market Access



Gil Kaufman
Policy, Project
& Data Advisor



Linda Bloomfield
International Membership &
Marketing Support



BELORTA

redefining fruit & vegetables

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

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Business begins in Brussels

Freshfel Europe is involved in European level decision making in all policy areas relevant to the European fresh fruit and vegetable sector. Located in Brussels, Belgium the Freshfel Europe Secretariat is situated at the heart of European policy making to ensure that the interests of the fresh produce sector are well represented.

Freshfel Europe in close collaboration with its members is actively involved in Freshfel Europe's activities in the EU policy arena with the European institutions and its Member States as well as other international bodies, such as UNECE, WHO, FAO, OECD, WTO and the Global Alliance for Trade Facilitation. In doing so, Freshfel Europe conducts its advocacy work on behalf of the general interest of the whole sector.

Freshfel Europe regularly participates in European Commission Civil Dialogue Groups (CDGs), Market Observatory and Agri Outlook as well as ad hoc Expert or Stakeholder Groups. Both the Freshfel Europe Secretariat and Freshfel Europe member representatives attend these policy meetings.

Freshfel Europe is actively involved in the European Commission DG AGRI CDG meetings, including:

- CDG on Horticulture, Olives & Spirits: Fruit & Vegetables (Chair)
- CDG on Organic Farming
- CDG on CAP
- CDG on International Aspects of Agriculture
- CDG on Quality & Promotion (Chair)
- Market Observatory for Fruit and Vegetables (for apples and pears, citrus, peaches and nectarines, and tomatoes)

Freshfel Europe is actively involved in the European Commission DG TRADE committees, including:

- SPS Market Access Working Group
- Market Access Advisory Committee
- Civil Society Dialogues on ongoing trade policy and negotiations

Freshfel Europe also is an active member of the stakeholder dialogue platforms organised by the European Commission DG SANTE, which help better develop effective policy and guide European action and initiatives, including:

- Advisory Committee on the Food Chain and Animal and Plant Health
- EU Health Policy Platform
- EU Platform on Food Losses and Food Waste



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Freshfel Europe – a 20-year journey servicing the whole supply chain

Freshfel Europe started its operations on 11 September 2001 when the world was under the shock of the brutal attacks in the United States. Twenty years later we are experiencing the many uncertainties of an ever-changing business and day-to-day life environment following the continuing COVID-19 pandemic.

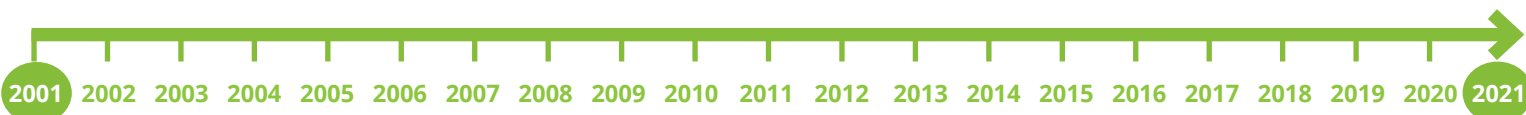
Freshfel Europe was built as a forum, a platform where representatives of the sector could exchange perspectives and jointly defend the collective interest of the sector. Freshfel Europe is a unique structure in the European environment as the Association represents the whole supply chain rather than a single segment, from production down to retail. It was often perceived as an impossible mission to voice a common position for the sector, however this has not been the case. Thanks to the role of successive Presidents and the Freshfel Europe Board unity has always prevailed, placing the products as the key protagonist of the work of the Association.

Freshfel Europe was built in the aftermath of the changes of the Common Market Association for the fruit and vegetables sector, replacing support to products by support to a structure for production centred on pro-

ducers organizations with operational programmes. The creation of Freshfel Europe was in line with this evolution.

In the last 20 years the topics the Association covers have become more and more complex, including food and plant safety legislation, nutrition policy, trading environments and market access policy. More recently and for the upcoming decade, broader sustainability developments are leading to new matters linked to climate change and circular economy with its challenges ranging from packaging policy, environmental footprint, the rise of digitalization and the development of new technologies to enhance food security. The sector is also confronted with a rapidly changing consumer in search of highly convenient products with better social and environmental attributes, while also valuing closer proximity to product production.

Freshfel Europe, along with the support of all its members, is well equipped to navigate these new challenges, place the benefit of our products at the forefront of all policy and increase its environmental and health value in the eyes of consumers. Freshfel Europe will always be ready to support the sector in moving towards a more successful and brighter future.



- 2001** Negotiations between CIMO & EUCOFEL conclude leading to the establishment of the European Fresh Produce Association
- 2002** First statutory AGM on 20 February, appointing Kai Krasemann as President
- 2003** Launch of the Freshquality website in preparation for EU enlargement
- 2004** Activities marked by EU enlargement to 10 Eastern European countries
- 2005** Increased focus on food safety & participation of Freshfel Europe in the Crop Protection Working Group of GlobalGAP
- 2006** Pino Calgagani appointed President
- 2007** Freshfel Europe joins the EU Platform for Diet, Physical Activity & Health
- 2008** Ramon Rey appointed President
- 2009** Lobbying towards the setting up of the European Fruit & Vegetables schemes
- 2010** Freshfel Europe holds talks in Moscow in regard to market access in Russia
- 2011** Celebrating 10 years of Freshfel Europe in Rotterdam when EHEC crisis arises
- 2012** Freshfel Europe moves to a new office in the European district
- 2013** Philippe Henri appointed President
- 2014** Sustainability becomes a new focus & new engagement in Research & Innovation
- 2015** Freshfel Europe launches its Qlickfresh website
- 2016** Luc Clerx appointed President
- 2017** Freshfel Europe prepares views for the future CAP
- 2018** Stephan Weist appointed President
- 2019** Freshfel Europe is active in Brexit negotiations
- 2020** Activities focused on the COVID-19 pandemic
- 2021** Freshfel Europe celebrating its 20th anniversary



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Freshfel Europe's Presidents

Freshfel Europe's Presidents have shaped and oriented the Association over the last 20 years. Each President has governed the Association in the interest of all the members

and for the benefit of the fresh fruit and vegetables category, uniting forces to secure a competitive environment for the sector and stimulate fresh produce consumption.



Kai Krasemann

Kai Krasemann (DE, Fruchthansa), the Association's first President from 2001 to 2006, brought together the different segments of the supply chain to build an Association entity respected for its professionalism by authorities, its capacity to compromise on issues, its advice to policy-makers and provision of services to the membership.



Pino Calcagni

Pino Calcagni (IT, Besana Group) was President from 2006 to 2008. During his term the membership was consolidated with higher representation from EU production and began sector representation on policy matters. He was elected Chair of the Advisory Committee for Fruit and Vegetables and worked closely with EU Trade Commissioner Peter Mandelson, engaging with the Chinese authorities for market access. Freshfel Europe was also actively involved in the European Parliament Intergroup on Fruit and Vegetables.



Ramon Rey

Ramon Rey (ES, ARC Eurobanan) led the Association from 2008 to 2012. Under his leadership Freshfel Europe boosted its activities on quality and food safety, nutrition and health and third countries markets, holding regular meetings in Russia. During his term Freshfel Europe convinced the European Commission and Commissioner Marian Fischer Boel to set up a €90 million annual budget for the distribution of fruit and vegetables to EU schools.



Philippe Henri

Philippe Henri (FR, UNCGFL) presided over the Association from 2012 to 2015. Representing the wholesale segment of the membership, the Association actively moved its activities towards the diversification of market outlets, especially foodservices. The debate on sustainability began to take momentum and the Association prepared its membership for new requirements. His term was also marked by the follow up of the Association of the consequences of the sprouted seeds EHEC crisis.



Luc Clerx

Luc Clerx (BE, Zespri-Prominent) took over the Presidency from 2015 to 2018. Managing the consequences of the Russian embargo and providing responses to food and plant safety issues were important and complex dossiers handled by Freshfel Europe during his mandate. The Association was also engaged in different EU R&I projects and coordinated the sector's priorities under Horizon 2020 and later on Horizon Europe with a task force with AREFLH, EUFRIN and EUVRIN.



Stephan Weist

Stephan Weist (DE, REWE) is the current President where circular economy, sustainability and farm to fork are day-to-day realities and priority areas for action. His term so far has been marked by Brexit and the COVID-19 pandemic, both of which Freshfel Europe has successfully navigated. Freshfel Europe has also been heavily involved in the European Commission's economic diplomacy efforts in close cooperation with Commissioner Hogan.

We are Coöperatie Hoogstraten

Join us on our Quest to be the Best

Together, we strive for the highest quality in products and production, in craftsmanship and innovation. We invite you to cocreate a sustainable future for the fruit and vegetable sector.

So join us → www.hoogstraten.eu



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The International Year of Fruits and Vegetables 2021

2021 has been designated by the UN General Assembly as the International Year of Fruits and Vegetables (IYFV). The IYFV is a unique opportunity to raise awareness of the important role of fruits and vegetables in human nutrition, food security and health as well as in achieving the UN Sustainable Development Goals.

The four objectives of the IYFV 2021 are:

- 1 Raising awareness of and directing policy attention to the nutrition and health benefits of fruits and vegetables consumption.
- 2 Promoting diversified, balanced, and healthy diets and lifestyles through fruit and vegetable consumption.
- 3 Reducing losses and waste in fruits and vegetables food systems.
- 4 Sharing best practices on promotion and consumption, improved sustainability, supply chains and capacity strengthening.

The IYFV 2021 falls within the UN Decade of Action on Nutrition (2016-2025) and the UN Decade of Family Farming (2019-2028). FAO is the lead agency for celebrating the year in collaboration with other



INTERNATIONAL YEAR OF
FRUITS AND VEGETABLES
2021



relevant organizations and bodies of the United Nations systems. Freshfel Europe is encouraging the EU fruit and vegetable community and beyond to support this important international year. Freshfel Europe is calling on its members to proactively engage in the IYFV 2021 to maximize the outreach of this exceptional yearlong initiative to boost consumption and raise awareness of the sector's constant work to improve the health of all citizens and increase global sustainability.

To support and celebrate the IYFV 2021 Freshfel Europe is running a digital campaign '#SpeakUp4FruitVeg'. Launched in January 2021, the campaign is targeted at EU decision-makers to better support the sector in EU policy-making. Through regular posts on its social media accounts (Twitter, LinkedIn, Facebook) Freshfel Europe hopes to boost support for the sector by EU decision-makers including European Commission officials, Members of the European Parliament and Member State representatives throughout 2021.



This shouldn't be the case!

**Average daily EU
fruit & vegetable intake
= 364g**



**WHO minimum recommended daily
fruit & vegetable intake
= 400g**





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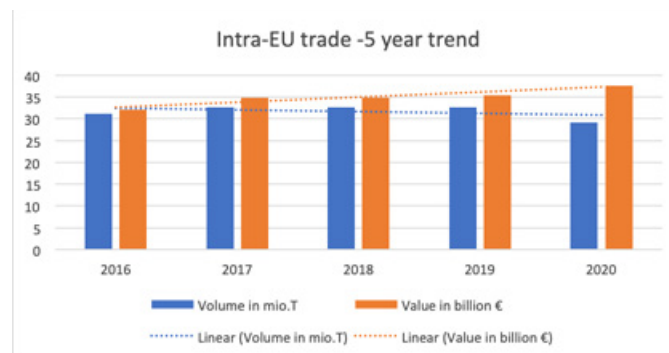
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Market and business developments

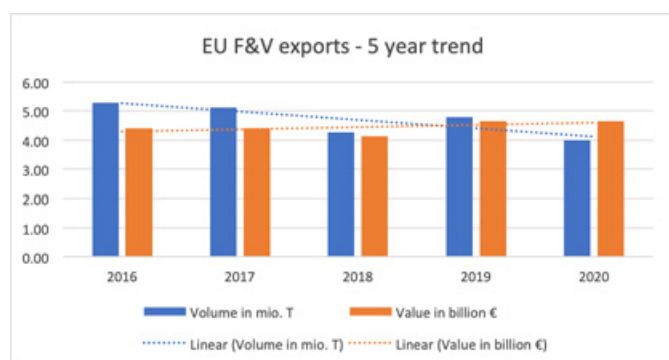
Intra-EU trade – 5-year trend

In 2020, intra-EU trade amounted to 29.2 mio T, worth €37.7 billion. The largest suppliers were Spain (10.5 mio T), the Netherlands (7.5 mio T), and Italy (2.6 mio T). The biggest recipients were Germany (6.9 mio T) and France (3.6 mio T). Intra-EU trade is a stable pillar of economic development in the EU fruit and vegetable sector with total EU production for fresh produce set at 67.7 mio T (2019).



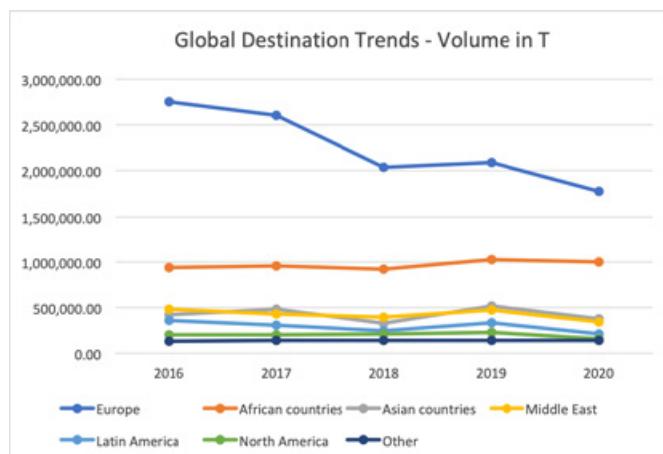
EU exports to worldwide markets – 5-year trend

2020 saw stable figures in market value despite a decrease in EU exported volumes of fruit and vegetables with 4 mio T of EU fruit and vegetables exported, worth €4.7 billion. Export volumes have decreased in the last five years, while export value has been developing steadily and has stabilized at €4.7 billion in the last two years.



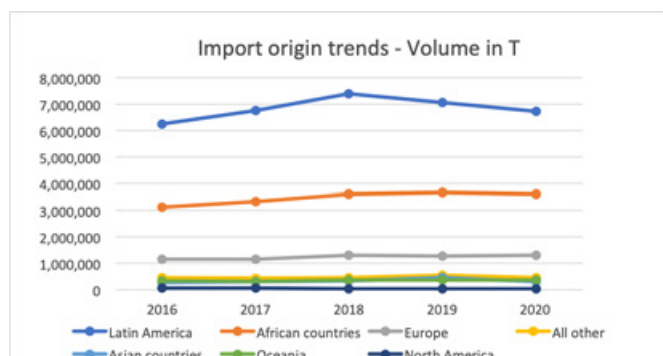
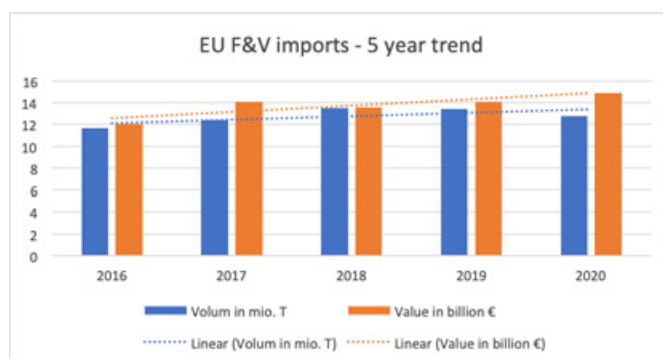
Market closures and seasonal developments have impeded exports to key European destinations across the European neighbourhood resulting in 35% of market losses in the past 5 years. This also reflects the export difficulties in 2020 due to the COVID-19 pandemic. There has been a

stabilization of all key export regions with limited growth outlook.



EU Imports from global destinations worldwide – 5-year trend

Imports into the EU have been growing by an average of 6% in value. However, between 2019 and 2020 a minor decrease in volume was recorded. There has been a slight drop of imports from Latin American countries, but overall stable import volumes to the EU. Key imported goods in 2020 were bananas (4.8 mio T), oranges (907,000 T), pineapples (677,000 T) and avocados (556,000 T).





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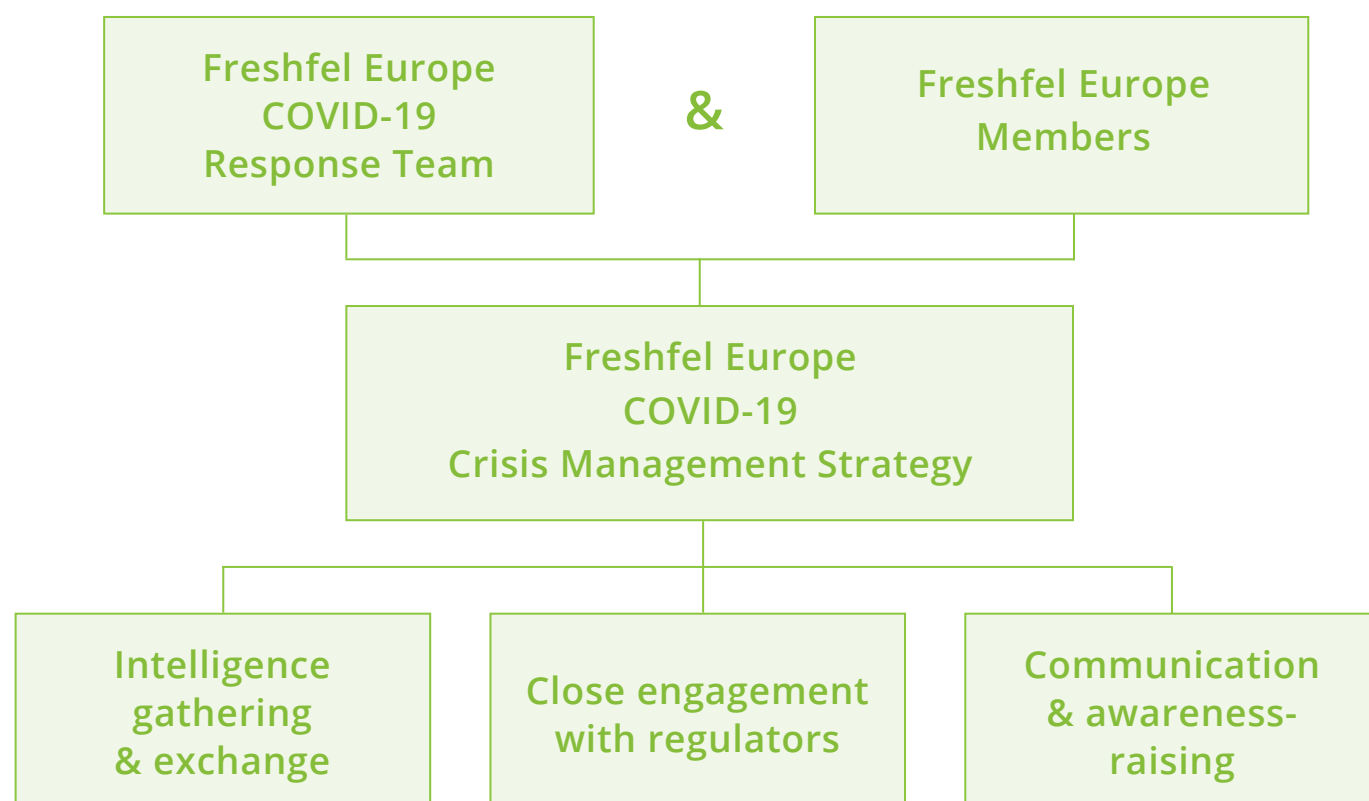
Supporting the sector to navigate the COVID-19 storm

Since the start of the coronavirus pandemic, Freshfel Europe's internal Coronavirus Response Team has continuously engaged with Members on COVID-19 related disruptions and challenges for the fresh produce sector. In addition, Freshfel Europe has intensively engaged with policy-makers on this topic. Following the publication of its COVID-19 Impact Assessment for the European fresh fruit and vegetable sector in May 2020, Freshfel Europe presented the main findings of this study to the European Commission and the OECD Group on Fruits & Vegetables. Moreover, Freshfel Europe General Delegate Philippe Binard took part in a European Parliament Hearing on COVID-19 last autumn, highlighting the importance of the measures undertaken by the EU to ensure the continuation of the sector's activities, such as the set-up of Green Lanes, as well as the resilience of the sector overall to tackle the crisis.

Throughout the second and third waves of the pandemic in Europe and following the spread of new COVID-19 variants, Freshfel Europe has closely monitored and strongly opposed to the re-introduction of border closures and other movement

restrictions in various Member States. Freshfel Europe has advocated for coordination among Member State measures and for these to take into account the needs of the fresh fruit and vegetables sector, an essential industry, to continue operations, particularly when it comes to the movement of seasonal workers and truck drivers within the Single Market.

Freshfel Europe is actively contributing to the European Commission's work towards the definition of a future 'Contingency plan for ensuring food supply and food security'. Freshfel Europe issued a position paper in January 2021 calling for better coordination in crisis prevention, detection and communication mechanisms at EU level, a more comprehensive crisis management strategy focused on the lessons learnt from the COVID-19 pandemic, and the need to focus on communication with key stakeholders as a crucial element to sustain food supply chains in the face of crises. As part of this process, Freshfel Europe's General Delegate Philippe Binard was also invited to the March meeting of the European Commission's Working Group with Member States on the future contingency plan, during which he called for public-private partnerships to handle future crises more efficiently.





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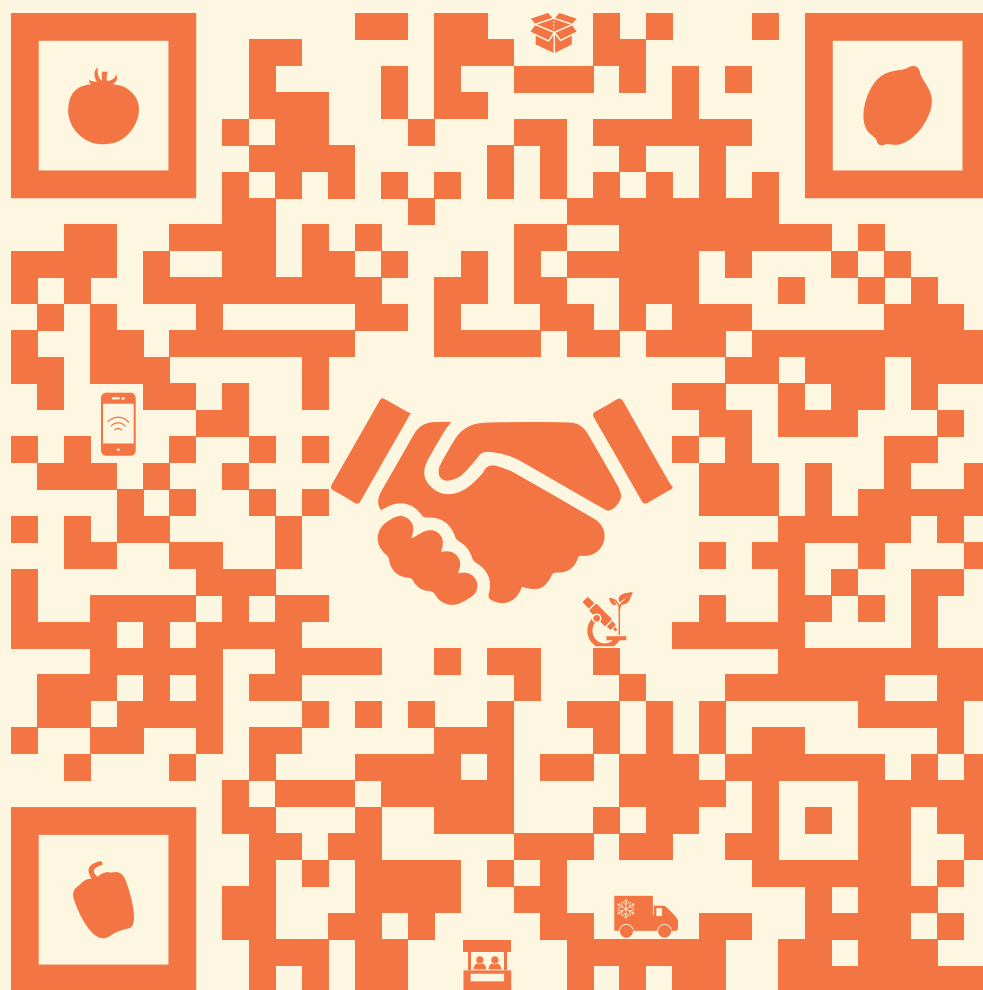
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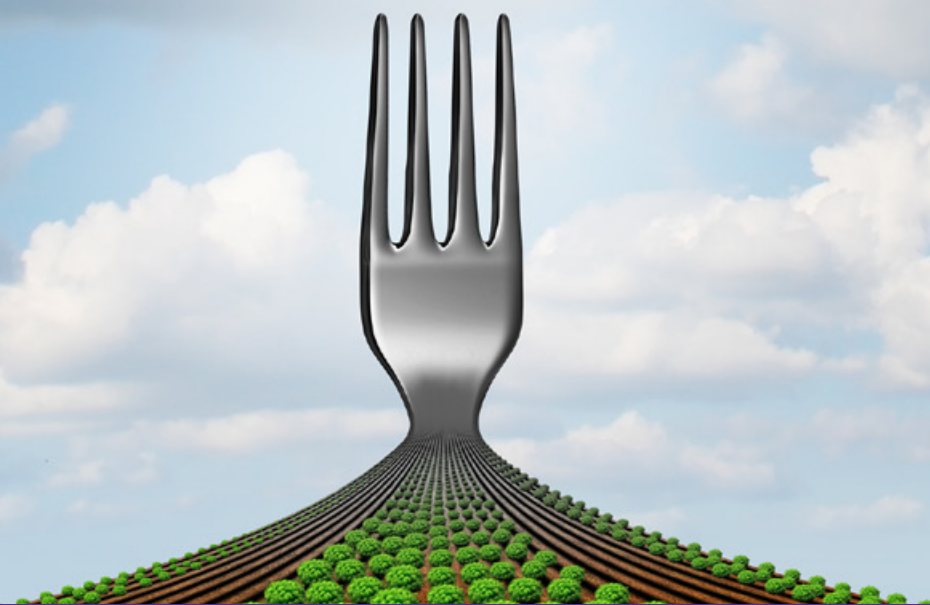


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RECONNECTING
the World Fresh Produce
Community





Seizing new opportunities for fresh produce from farm to fork

The Farm to Fork Strategy is one of 11 new policy approaches of the European Commission's European Green Deal. It aims at shaping a fair, healthy and environmentally friendly food system in the EU and beyond. Freshfel Europe has been actively engaged in all policy debates under the Strategy.

Production

- Freshfel Europe is following the CAP and CMO reforms, the share of environmental actions for producers' organization and their operational programmes as well as the priorities of national strategies.
- Freshfel Europe is following the consequences of reducing the plant protection toolbox to secure that EU production remains competitive and well equipped to address emerging challenges from climate change.

Production & trade

- Freshfel Europe is following the impact of new targets in regards to the reduction by 50% of the most hazardous plant protection products and by 20% of fertilizers, and the implication of these reductions for international trade both for EU imports and exports.
- Freshfel Europe is following the expected growth of organic EU farmland from ~8% to 25%, while maintaining a balance between offer and demand, without forgetting the role of IPM and

the sector's dedication to the sustainable use of pesticides

- Freshfel Europe is following the revision of marketing standards, evaluating how they should reflect new requirements for sustainability and convenience.

Supply chain

- Freshfel Europe is following the good functioning of the supply chain for securing social, environmental and economic sustainability, especially the new legislation on Unfair Trading Practices and the EU Code of Conduct for Responsible Business and Marketing Practices.
- Freshfel Europe is following the debate on EU food supply and security in the new EU Contingency Plan and participates to the work of the European Commission Market Observatory and other such initiatives, including the Agri Outlook.

Stimulating healthy and sustainable diets

- Freshfel Europe is following the new objective of stimulating plant-based diets through different initiatives, including the EU promotion policy, the reform of the EU School Scheme and nutrition labelling.
- Freshfel Europe is following sustainability-focused initiatives, including the legislative framework for a sustainable food system, sustainability labelling and EU food waste reduction targets.



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9|10|11 FEBRUARY 2022

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Fruit & vegetables at the forefront of a sustainable future

Sustainability is driving debate in all policy areas in Europe. Improving sustainability is a key driver of the European Commission's European Green Deal, including in the Farm to Fork Strategy, Circular Economy Action Plan 2.0 and the Biodiversity Strategy to 2030. New sustainability policy under these strategies is boosting the fresh fruit and vegetable sector's own efforts to enhance the supply chain's environmental, economic and social sustainability now and into the future.

As a key policy area Freshfel Europe keeps its members informed of upcoming regulatory and non-regulatory sustainability developments and ensures that the sector's interests are well represented at EU level. Freshfel Europe is closely following the evolution of packaging legislation to ensure that the fresh produce sector can continue to use sustainable, circular and innovative packaging solutions that also provide a high level of functionality. In coordination with members Freshfel Europe is actively engaged in the revision of the essential requirements under Directive 94/62/EC on packaging and packaging waste as well as the transposition into national legislation and implementation of Directive (EU) 2019/904 on the

reduction of the impact of certain plastic products on the environment (also known as the Single-use Plastics Directive).

Since the end of 2020 Freshfel Europe began discussions with its membership on the heightening importance of environmental footprint calculation both for B2B and B2C product sustainability communication. With the announcement of national sustainability labelling already in France, impending EU-wide sustainability labelling by 2024 as well as a strong desire of the sector to identify hotspots to further enhance and accurately account for product sustainability, Freshfel Europe established a new Working Group on Environmental Footprint. The Working Group meets once per month to discuss pertinent topics and common initiatives. Freshfel Europe also retains its seat as a member of the EU Platform on Food Loss and Food Waste, where the environmental impact of products is discussed.

All sustainability matters are discussed at the Freshfel Europe Sustainability Working Group, involving experts from across the supply chain. To adapt to COVID-19 restrictions, Freshfel Europe has substituted its Sustainability Working Group meetings with topical webinars on sustainability matters.



YOU ARE INVITED!



HortiFootprint Category Rules can help fruit and vegetables industry to achieve successful environmental footprinting

Fresh Produce Centre Netherlands is working together with other EU member states in the Freshfel Working Group on Environmental Footprint.

Cooperation in testing and further develop the method of HortiFootprint Category Rules helps to work together as a sector towards an internationally recognized, objective scientifically based method to measure our sustainability through environmental footprinting.

Current situation

- First version of scientific method for product environmental footprints in horticulture publicly available, via Wageningen University & Research (official scientific publication).
- The methodology (HFCR July 2020) is as far as possible in line with European directives and EU PEF CR guidelines.
- Freely available to get started in your supply chain.

Invitation

- Work together with us and other EU member states for the more sustainable fruit and vegetable chain of tomorrow!
- Map out the hotspots and environmental impact of your own chain.

We achieve

- An international standard methodology for measuring environmental sustainability in the fruit and vegetable sector based on LCA principles.
- An answer to important issues which are mentioned in the EU Green Deal/Farm to Fork.
- A helping hand in B2B communication and discussions about sustainability on a more rational level.



Boosting organic in line with evolving demand

As part of the Farm to Fork Strategy, the European Commission has set an ambitious objective to reach 25% of organic European farmland by 2030. Today, the EU fresh produce organic market accounts for around 5% of the assortment. While the EU is stimulating production and increasing the conversion of orchards, it is important to secure a balance between supply and demand.

Freshfel Europe understands the need to stimulate consumption, however the Association raised concerns about the disproportionate share of budget dedicated to organic promotion only in the EU promotion policy Annual Work Programme (AWP) 2021. 30% of the AWP 2021 total budget solely dedicated to organic promotion is excessive compared to current market trends both in the internal market and also on international markets. EU promotion policy should avoid restrictively dedicating its budget for a niche production segment destined for a niche market of affluent consumers who can afford to pay a price differential at a time when the COVID-19 pandemic is leading to price pressures, which may be detrimental for premium products such as organic. Beyond organic production, the fruit and vegetables sector has been involved in many sustainability initiatives and IPM techniques that protect the environment, biodiversity and sector, offering a high level of safety for bystanders and consumers.

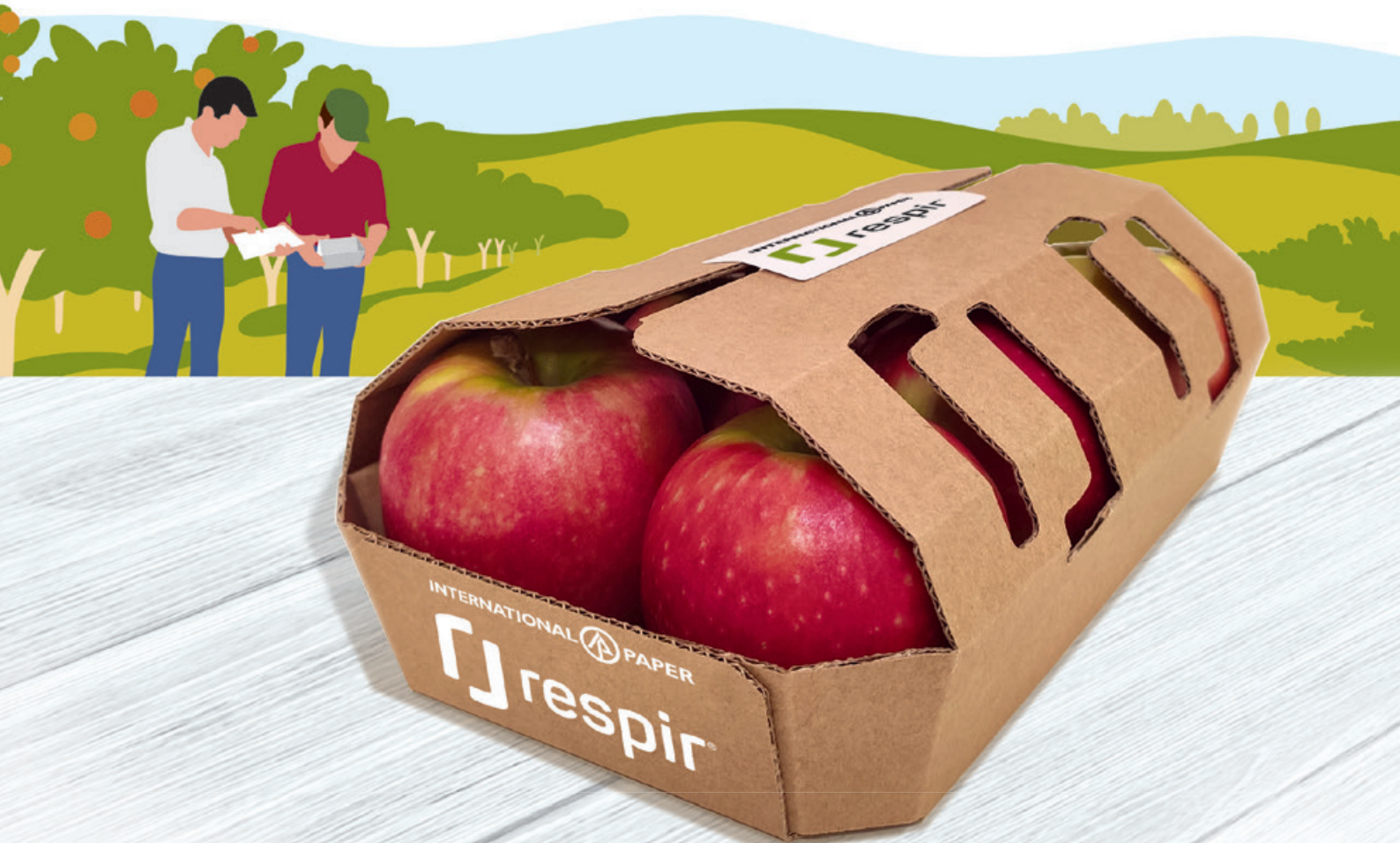


Freshfel Europe is closely following the last steps towards the coming into force of the new organic legislation on 1 January 2022. Several secondary legislation texts are being finalized to govern future production, trade, control and traceability rules. Through its dedicated webinars gathering organic experts from its membership, Freshfel Europe is reviewing the new requirements to ensure they reflect the expectations of production and trading practices.

In the coming months, Freshfel Europe will be closely following the direction set by the EU Organic Action Plan to support production and consumption of organic products and look at the sustainability of the sector. Freshfel Europe with its members will review the three axes of the Action Plan and its 23 actions towards stimulating demand and consumer trust, stimulating conversion and reinforcing the value chain, and improving the contribution of organic farming to sustainability.



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Confidence in food safety policy

Securing consumer confidence in regard to food safety and quality is essential in the fresh fruit and vegetable sector.

Daily 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 for the work of Freshfel Europe and its members.

For many years Freshfel Europe has been aiming for full compliance with European legislation on food quality and safety, while minimising the use of chemical plant protection products and moving towards sustainable agricultural practices. Freshfel Europe fully supports the European Commission's approach to set out relevant ambitions and actions to stimulate sustainable food production and to create new business models for food producers to thrive in a sustainable food system.

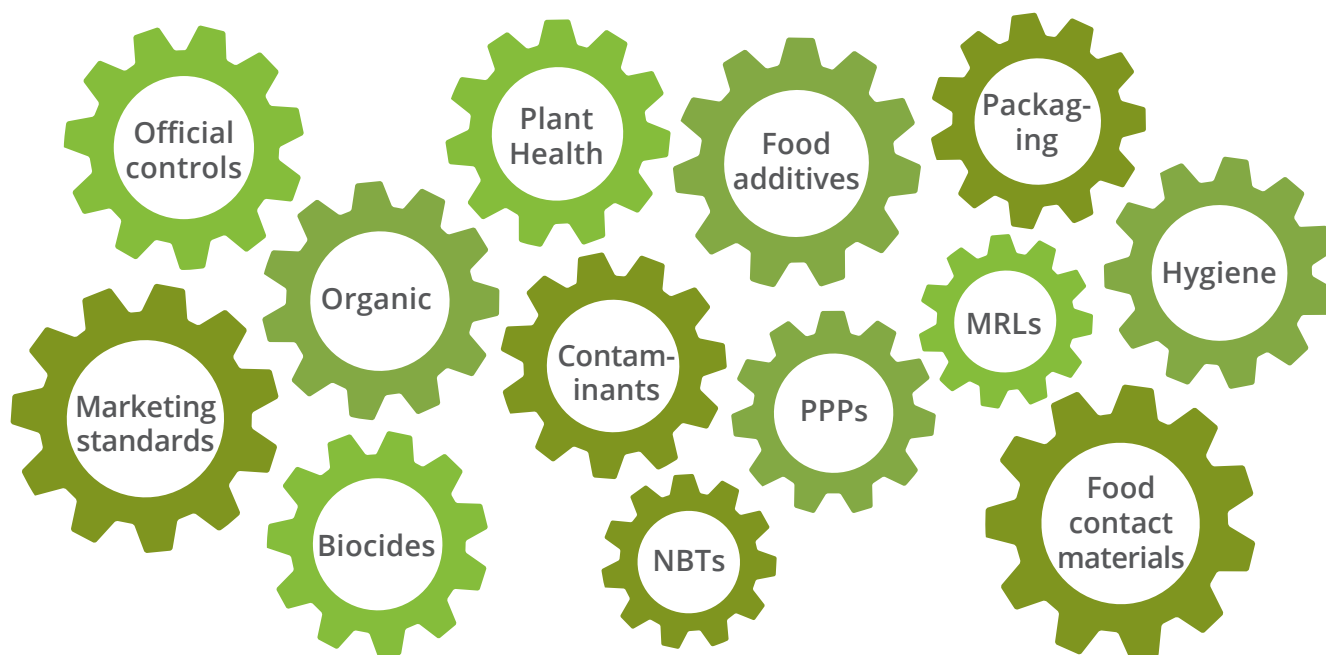
It has been a year since the publication of the EU's Farm to Fork Strategy under the European Green Deal to facilitate the provision of safe and high quality food to European citizens. The Strategy's ambitions align with Freshfel Europe's mission to ensure that the European fresh fruit and vegetable sector is dynamic and supplies healthy products using the highest quality and safety standards to meet consumers' expectations and changing needs. Freshfel Europe closely follows the activities of the European Commission and with the support of its members contributes to numerous consultations

aiming to support the implementation of targets set under the Strategy. Without doubt climate change is putting more pressure on the environment creating favourable conditions for the proliferation of pests and diseases. In this context, it is important to secure a toolkit for growers to address these concerns.

Now under the European Green Deal and into the future policy-makers need to formulate policy coherently and holistically so that the sector's efforts in one area are not being constrained by another.

While the debate regarding plant protection products should remain scientifically driven, it is noted that the political environment regarding food safety policy has intensified in the last few years. In particular, the European Parliament is continuously taking positions regarding plant protection products. Freshfel Europe carefully analyses such initiatives, provides assessments to its members and when needed engages in a dialogue with the Members of the European Parliament.

To adapt to COVID-19 restrictions, Freshfel Europe has substituted its biannual Food Quality Working Group meetings with monthly topical webinar sessions on food safety and quality matters. Webinars bring together a large number of experts from different layers of the supply chain. Through Freshfel Europe webinar sessions Freshfel Europe members are provided with the opportunity to gain knowledge on a wide range of topics and exchange with other stakeholders on emerging matters.



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Promoting biosecurity & trade facilitation through digitalization

During the last year Freshfel Europe has continued to closely monitor new measures related to plant health as well as the over-all implementation of the EU plant health and official controls legislation. As part of this work Freshfel Europe has contributed to the European Commission's consultation exercise under Article 50 of the Plant Health Law, providing information about the enforcement and effectiveness of the measures relating to imports into the Union territory. This will be analysed by EU policy-makers to assess the need for future amendments in the legislation.

Freshfel Europe has continued advocating for transparency in the reporting of plant health interceptions, for which the use of digital tools is essential. In this regard, Freshfel Europe has supported the European Commission's work

to facilitate IMSOC rules and urged the European Commission to find solutions to modernize the Europhyt reporting system towards a real-time notification system similar to the Rapid Alert System for Food and Feed. This would enable the fresh fruit and vegetable supply chain to maintain its self-responsibility to respond to arising biosecurity threats.

In addition, Freshfel Europe continues to recommend trade facilitation to enable international trade of perishable fresh produce in line with international plant health standards, particularly in the context of the COVID-19 pandemic. As part of this work, on 20 October 2020 together with the World Bank Group (WBG), Freshfel Europe organized a webinar focused on the importance of trade facilitation and the implementation of the World Trade Organization Trade Facilitation Agreement (TFA), particularly in the area of biosecurity and official controls.





20

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Helping the sector reach new markets & continuing smooth trade with the UK

During the past year Freshfel Europe has actively contributed to the European Commission's discussions towards a new EU Trade Policy Strategy, stressing the importance of both imports and exports for the economic sustainability of the sector.

Freshfel Europe continued to highlight the need to tackle sanitary and phytosanitary (SPS) barriers and the importance of trade enforcement and international cooperation to ensure a fair environment for fresh fruit and vegetable trade. Freshfel Europe published a Reflection Paper in March 2021 urging the EU to have a fully-fledged Strategy on SPS barriers to ensure reciprocity in trade relations following the EU Trade Policy Review.

Freshfel Europe continues to support the sector's efforts to gain market access around the world. Freshfel Europe, through its General Delegate Philippe Binard is an active participant in the European Commission promotion seminars organized under the DG AGRI initiative 'Enjoy it's from Europe' as well as under DG TRADE's Foreign Policy Initiative (FPI). In past months he has represented the voice of the European Fruit and Vegetables sector in meetings with Vietnam, Thailand and Japan. Freshfel Europe is also taking part

in the European Commission pilot project to open the Canadian and USA markets to European tomatoes with green parts, through European coordination by Natalia Santos, Freshfel Europe Director Trade & Market Access. The Association has also intensively worked to ensure EU exports to India will be able to continue without disruption despite the implementation of new certification requirements.

The last year has also been marked by an active effort of the Freshfel Europe Secretariat to support its members to prepare for the new import requirements to access the UK market after Brexit. Freshfel Europe has elaborated a detailed Q&A for its members which it regularly updates, and has organized multiple webinars to liaise with members on this preparedness work, which is essential for the sector now that the UK has become the first export market for European produce with over 3 million tonnes of annual volume. The Freshfel Europe Secretariat has also kept in close contact with EU and UK authorities to ensure the voice of the sector is heard. **The decision of the UK authorities in March 2021 to postpone the introduction of SPS checks and phytosanitary certification obligations for EU exports until 2022 illustrates that these efforts have brought concrete results to fruition.**





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ORIGIN ■

Identifying country or region of origin helps consumers to select in-season produce.

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Labels identify different varieties and can be used to indicate eating characteristics e.g. 'sweet and juicy', 'crunchy' etc.

SUSTAINABILITY ■

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PRINT-ON-DEMAND® (POD) ■

POD technology enables the printing of variable information - lot/batch and date code etc. - at the point of application.

IDENTIFICATION ■

Barcoded produce enables checkout efficiency, item-level identification and pricing accuracy.

BRANDING ■

Showcasing a brand on produce provides differentiation on price and quality, allowing consumers to make informed choices.

PRICE LOOK-UP (PLU) ■

PLU is used by retailers to make checkout inventory control, and pricing of individual, loose fruit and vegetables easier, faster and more accurate.



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Digital trade & commerce driving the post-COVID-19 agenda

Freshfel Europe has recognized the value of digitalized trade certificates for over half a decade since it joined the Industry Advisory Group to the IPPC ePhyto project in 2016 to support the international endeavour to build a global transmission system for electronic phytosanitary certificates. The ongoing COVID-19 pandemic has now moved this to the centre of debate on global, EU and industry levels. Consequently, Freshfel Europe has been advocating for more harmony and simplicity in the evolution of trade facilitating tools such as TRACES and the ePhyto hub. It is in Freshfel Europe's interest that the status of transmitting electronic certificates implemented through COVID-19 measures should not be reverted back to paper certificates. Therefore, Freshfel Europe:

- Is in regular exchange with the European Commission to foster connectivity within the EU and with its major trading partners and to voice the sector's practical day-to-day business challenges.
- Has been teaming up with international organisations, such as the World Bank and the Global Alliance for Trade Facilitation, to globally bring together private and public stakeholders to discuss the major challenges in accelerating digitalization of trading operations and trade facilitation.

- Reinforced its engagement in the Industry Advisory Group of the IPPC ePhyto project by steering cross-sectoral communication via press releases and is supporting the organisation of public-private onboarding country seminars.
- Has been invited to support the holistic development of a common single window for customs operations in the EU in 2021 and beyond.

Acceleration triggered by the pandemic has also been experienced in the area of e-commerce, of which fruit and vegetable sales have been benefitting significantly. Freshfel Europe in cooperation with the OECD published a study in January 2021 entitled 'Online Sales of Fruit and Vegetables in Europe'. The study focused on the e-commerce environment in the EU and explored for the first time ever the e-commerce coverage and structure in the fresh produce sector through sample countries.

Aware of the strong fragmentation and national differences in the e-commerce market, Freshfel Europe will increase its effort in 2021 to gather knowledge and expertise on consumer uptake and possibly create more favourable business structures for the future of fresh produce e-commerce.





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Momentum to stimulate fresh fruit and vegetables consumption

While EU fresh fruit and vegetables consumption remains on average about 10% below the 400g minimum average daily per capita consumption recommended by WHO, there has never been such a momentum to boost consumption. The COVID-19 pandemic is driving consumers towards products that can boost their immune system and health while seeking ways to consume products that bring them closer to nature. Fresh produce offers both these health and environmental assets.

The Farm to Fork Strategy is aiming at engaging consumers towards a more plant-based diet, a trend previously influenced by movement towards vegetarian, vegan and flexitarian diets. This year the sector is also enjoying a unique opportunity to increase the visibility of fruit and vegetables through the UN International Year of Fruit and Vegetables 2021 (IYFV) under the direction of the FAO. Freshfel Europe has been promoting the IYFV through a social media campaign, #SpeakUp4FruitVeg, targeting decision-makers to better value the role of fresh produce and secure that fruit and vegetables are well placed in policy-making.

Freshfel Europe is strongly engaging in the European promotion policy-making. Since last

year Freshfel Europe has held the Chair of the Civil Dialogue Group Promotion and Quality of the European Commission with Simona Rubbi (Freshfel Europe Board member and CSO Italy) as Chairwoman. Freshfel Europe contributed to the setting of promotion priorities for the Annual Work Programme 2021 and 2022, and in January 2021 headed with Copa Cogeca a meeting with Agriculture Commissioner Janusz Wojciechowski. Freshfel Europe is shaping the sector position for the reform of the Promotion policy to secure a robust budget for this policy with a growing budget for fruit and vegetables. Freshfel Europe is currently organizing a policy conference for policy-makers and Members to further voice the position of the fresh produce sector.

Throughout 2020 and into 2021 Freshfel Europe has continued its promotion project 'Follow me to be healthy with Europe', a digital EU-funded promotion programme targeted at millennials. Many of the programme's activities were severely impacted by the pandemic restrictions, which required the adjustment of some of the programme's objectives and activities without weakening the campaign, which is matching all its outreach targets to boost consumption.

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Become a Freshfel Europe Member

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Freshfel Europe membership benefits:

GAIN KNOWLEDGE

- Timely updates on European and global fresh produce policy-making.
- Bespoke personal advice on technical EU legislation and legislative developments from Freshfel Europe's team of policy experts.
- Exchange with players right across the supply chain from across Europe and beyond providing you with invaluable knowledge and insights.
- In-depth information on European legislative proposals, implementation, implications and procedures.



GET YOUR VOICE HEARD

- Have direct and face-to-face exchanges with European Commission officials in charge of legislative developments.
- Contribute to Freshfel Europe's activities and make a difference to the future of your business.



- Enhance the visibility of your business within the supply chain at EU level.

INCREASE YOUR BUSINESS POTENTIAL

- Increase your business potential through intelligence gathering on current legislative processes.
- Contribute to common positions on European legislation to achieve harmonization across Europe.



EXCLUSIVE DATA ACCESS

- Exclusive and free access to European and global production, trade and consumption statistical data online to inform your business decisions.
- Free access to the annual Freshfel Europe Consumption Monitor normally for purchase at €1,000.



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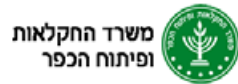
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