



freshfel

EUROPEAN FRESH PRODUCE ASSOCIATION

Activity Report 2023

A FRESH FACE FOR FRUIT & VEGETABLES



Welcome to the Freshfel Europe's Activity Report 2023

Freshfel Europe's Activity Report is published annually on the occasion of Freshfel Europe's Annual Event. This Activity Report covers the period of June 2022 to May 2023. It synthesises the work and activities of Freshfel Europe over the past 12 months. The report showcases the efforts of the Association to represent and make advocacy for the entire European fresh fruit and vegetable supply chain from production down to retail.

The activities correspond to the first year of the Presidency of Salvo Laudani, assisted by the two vice-Presidents Anders Lind and Frederic Rosseneu and the General Delegate Philippe Binard. The work of Freshfel Europe would not have been possible without the leadership of the Board at large, nor the active involvement of the members. Professional advice, operational knowledge and day-to-day business perspectives provided by members extensively contribute to the daily work of the Freshfel Europe secretariat.

Membership-driven association

The strength and reputation of Freshfel Europe are built through the valuable input of members in the fresh produce supply chain, constantly keeping the specifics of fresh fruit and vegetables at the centre of priorities. Freshfel Europe is a membership-driven association. Freshfel Europe's resources are exclusively generated by membership fees. All companies and associations of the European fruit and vegetables sector are invited to join forces with Freshfel Europe for mutual win-win benefits and to further reinforce the voice of the sector.



I would like to thank all Freshfel Europe members and associated members for their continued support in helping Freshfel Europe 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*

The Freshfel Europe Presidency Team



Salvo Laudani
President



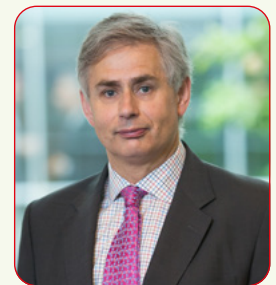
Frederic Rosseneu
Vice President



Anders Lind
Vice President



Marc de Nayer
Treasurer



Philippe Binard
General Delegate

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"WHAT IS ESSENTIAL IS INVISIBLE TO THE EYE"

(Antoine de Saint-Exupéry)

The men and women at Anecoop **WORK THE LAND** with passion, nurturing it with a sustainable vision, to build a project for our children that has a bright future.

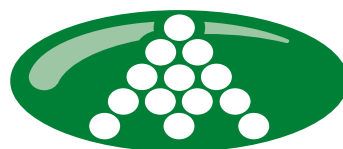
PREMIUM QUALITY and TASTE are the main demands of consumers, and they are ours too. We strive for excellence in all of our products.

We protect people's **HEALTH** by adding vitamins and minerals to their diet.

We guarantee **FOOD SAFETY** by growing our fruit and vegetables in accordance with European regulations and the most stringent certification standards.

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Foreword by President of Freshfel Europe

The first term of my Presidency was marked by a period of continued uncertainty and a proliferation and succession of “crises” of different kinds: energy, climatic, geopolitical and economic. The fresh produce sector needs to permanently adapt to an array of challenges while embarking on the road towards a more sustainable food system. The sector also continuously adjusts to accommodate societal concerns and ambitious European strategies. More than ever under these circumstances, Freshfel Europe plays an essential role in representing the interest of the sector.



Confronted with the far-reaching implications of the war in Ukraine, climate change and different policy initiatives, the sector has been operating in unprecedented business environments for the last 12 months, being subject to rising costs, climatic havoc, logistics hurdles and trade restrictions.

Food inflation has further impacted consumers' attitudes and purchasing power significantly, placing additional pressure on consumption levels across the EU. As price becomes the main driver for consumers' purchasing decisions, the rise of consumption during COVID-19 was lost in recent months.

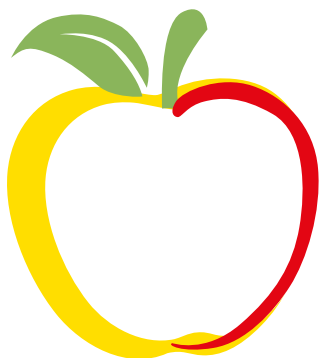
Last year, the Freshfel Europe General Assembly concluded that there was momentum to increase the consumption of fruit and vegetables. However, the last months have shown that several obstacles remain to

fully seize this momentum. The missing gap to reach the minimum 400 g/day needs to be filled and a particular focus must be paid to millennials and the younger generations. The nutritional and environmental assets of fresh produce, the Farm to Fork Strategy and the EU Beating Cancer Plan must generate a fresh move towards a plant diet and enhance consumption.

Leveraging the momentum for a healthy, sustainable diet and a prosperous future for our planet based on fresh fruit and vegetable consumption, we must build a fresh image and a new face for fresh produce to allow consumers to make informed decisions about their purchasing power.

It is time to act and build “A new face” for fresh produce. The sector needs to improve the image of fresh produce and attract consumers based on our assets. To pave the way for this ambition is our objective for the 2023 Annual Event and during the second year of my mandate as President of Freshfel Europe.

Salvo Laudani
President, Freshfel Europe



ASSOMELA

ASSOCIAZIONE ITALIANA PRODUTTORI DI MELE



Organised to move forward & be response driven



freshfel

EUROPEAN FRESH PRODUCE ASSOCIATION

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. Its actions are reinforced by services providers as associated members.

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 daily contact with its members, European and international institutions, and other sectorial colleague associations ensuring that the interests of the European fresh fruit and vegetable sector 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 of the highest quality, safety, environmental and social standards to meet consumers' changing needs, address societal challenges and be part of sustainable food systems.
- Freshfel Europe positions fresh produce in all policy areas and represent the sector's priorities addressed under the European Green Deal, the Farm to Fork Strategy, Fit55 objective and EU beating cancer plan.
- Freshfel Europe enhances R&I and digitalisation as essential in providing efficient toolboxes for production, modern IPM and precision farming, as well as in making the supply chain more efficient.
- Freshfel Europe continues its advocacy for high quality standards in regards to biosecurity and food safety across the entire supply chain, including production and intra-EU and international trade.
- Freshfel Europe is engaged in stimulating consumption and promoting the health and environmental benefits of fresh produce.
- Freshfel Europe keeps its members abreast of multiple policy initiatives to jointly build consensual and comprehensive positions and to facilitate collective actions.



Freshfel Europe Secretariat

The Freshfel Europe Secretariat is based in Brussels, Belgium, the heart of European policy-making.



Philippe Binard
General Delegate



Eglé Baecke,
**Director Food
Quality & Security**



Gil Kaufman,
**Project Management
& Market Analysis
Advisor**



David Fernández,
**Policy Advisor
Agriculture & Trade**



Joanna Nathanson,
**Policy Advisor
International
Affairs,
Sustainability &
Communications**



Linda Bloomfield,
**Membership &
Marketing Support**

Freshfel Europe operates in an open and transparent manner, coordinating regularly the sector's position in meetings with members on topical and emerging issues. This allows the Association to quickly respond to the need of the rapidly changing and evolving fresh produce market. The diversity of the membership from production down to retail and the structure of the membership including national associations and individual companies from across the EU allow the position of Freshfel to reflect in an all encompassing fashion the perspective of the European fresh fruit and vegetables sector, balancing policy and operational approaches.





Marketability +

Biologicals: Enhancing Crop Protection

With multiple modes of action, Serenade is an excellent fungicide choice for anyone concerned about marketability. That's because Serenade biological fungicide easily meets local and regional MRL standards, enabling growers to reach more markets. When used in combination with our other world-class crop protection products, Serenade is a vital component of an integrated crop solution that reliably boosts yield and the potential for profit at harvest time.

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Consult country registration status, local registrations may differ. Use plant protection products safely. Always read the label and product information before use.



Representing fresh produce in Brussels & beyond

Rules governing fresh produce find their roots in Brussels. Freshfel Europe is based in Brussels at the heart of European policy-making. The role of Freshfel Europe is to ensure that the interests of fresh produce are well represented and voiced, highlighting specific fresh produce features and its operational characteristics. Freshfel Europe closely interacts with the EU institutions and attend:

- DG AGRI Civil Dialogue Groups, ranging from CAP to markets policies, international affairs, organic farming, quality and promotion, and environment and climate change.
- DG AGRI Market Observatory (for apples and pears, citrus, peaches and nectarines, and tomatoes).
- DG AGRI European Food Security Crisis Preparedness and Response Mechanism (EFSCM).
- DG AGRI and DG TRADE missions in third countries to value the quality and safety schemes of EU fresh produce to build new export opportunities.
- DG TRADE committees, including the SPS Market Access Working Group, the Market Access Advisory Committee, and Civil Society Dialogues on ongoing trade policy and negotiations.
- DG SANTE stakeholders' platforms including the Advisory Group on Sustainability of Food Systems, EU Health Policy Platform, EU Platform on Food Losses and Food Waste, EU Biodiversity Platform.
- European Parliament: in contact with MEPs active in committees AGRI, ENVI and INTA.
- European Council: following activities mainly of the AGRIFRISH Council. In contact with EU rotating presidencies of the Council of the European Union.



Global connections

Beyond Europe, Freshfel Europe is also identified as a key speaking partner, with established long-term relationships with FAO, IPPC, OECD, UNECE and WTO. During the last year, Freshfel Europe's activities included addressing:

- IPPC international conference on plant health in London (UK).
- WTO SPS committee session on market access in Geneva (CH).

- WTO SPS committee session on sustainability in Geneva (CH).
- OECD /UNECE meeting on e-commerce in Paris (FR) and Bonn (DE).
- Exchange with FAO on water and food waste communication strategy (social media).

At the global level, Freshfel Europe is also taking a leadership role in the Global Coalition of Fresh Produce.



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Business in an evolving supply chain

In the last 12 months, the European and global fresh produce supply chains have experienced numerous unprecedented turbulences. The sector was confronted with a rapid succession of crises of different natures, such as geopolitical, climatic, energy and economic which impacted consumers' purchasing power, leading to a decrease of consumption.

The European and global fresh fruit and vegetable industries have encountered substantial increases in costs. These range from production inputs to packaging materials, agricultural equipment, general services and certification, logistics, labour, energy and natural resources such as water. Not all those costs were able to be recovered by increasing the price for consumers, as their purchasing power was also impacted by high inflation.

The "polycrisis" left dents in the economic margins of the sector. The sector has so far proven to be resilient despite an alarming situation with parts of production being either unharvested, put on hold or sold below the cost of production.

During the last year, Freshfel Europe engaged with its members in different activities, namely:

- Dedicated webinars to analyse the situation on the energy crunch, rising costs and market developments.
- Exchange of views on logistics outlook with the World Shipping Council (on availability, affordability, and routing efficiency), logistics experts for global and intra-EU logistics and on exploring options of rail transport. Extra attention has also been given to the Emission Trading System and the Carbon Border Adjustment Mechanism.
- Collaboration with the Global Coalition of Fresh Produce for mutual understanding of global trends and mutual contact with International Organisations such as FAO and the World Bank.

- Commitment to the work of the European Food Security Crisis Preparedness and Response Expert Group, working groups for Corporate Social Responsibility and Due Diligence and the Advisory Group on Sustainability of Food Systems.
- Call for EU support for export market diversification as a response to the market closures that have followed as a consequence of geopolitical developments.
- Call to WTO for proper implementation of the SPS agreement by its members and call to IPPC for improved standardisation and digitalisation.

At the moment of writing this report, the supply chain was witnessing some signs of stabilisation, allowing the sector to turn a corner and proactively embark on new challenges of decarbonisation and creating sustainable systems. Freshfel Europe will continue to be actively engaged in finding well-balanced solutions for economic, social and environmental sustainability.

Philippe Binard



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INCONITO - ICS Polymers & Services Ltd. - Microplastics, Patente, Europe 2018

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On the road to sustainable food systems

The triad of economic, social and environmental sustainability remains at the heart of policy in the EU, underpinned by the objectives of the European Green Deal. To streamline sustainability into food policy, the European Commission is moving towards the introduction of a Framework for sustainable food systems. The framework is meant to ensure a food system that fulfils all three sustainability criteria. A framework in which the fresh produce sector fits perfectly. It is however important that this framework is developed and defined through good governance and public-private partnership.

The fresh produce sector remains a pivotal part of the journey towards climate neutrality and prosperous economies, aligning with many of the Sustainable Development Goals of the United Nations. Fresh fruits and vegetables have high nutritional values,

limited water and land requirements, and a low carbon footprint. Freshfel Europe's members have been working hard on an Environmental Footprint Initiative, developing an objective, standardised footprint methodology and a database and digital tools for the fresh produce sector. Transparency and accountability of the sector's performance are essential to demonstrate the assets of fresh produce so that consumers can make informed choices for a sustainable and healthy diet.

Besides being in regular contact with decision-makers on sustainability issues, Freshfel Europe also conducted activities with the private sector, namely:

- organised multiple webinars with members to facilitate information exchange on agricultural practices, organic farming, packaging and labelling, and consumption.
- signed up to the European Code of Conduct to reinforce steps moving towards a sustainable diet.
- cooperated with EuroCommerce on best practices to boost consumption at the point of sales and to stimulate a healthier diet for European consumers.
- exchanged views with BEUC, the European Consumers Association on consumers' expectations for a sustainable diet.



Positioning fruits and vegetables on the sustainable agenda is a priority for Freshfel Europe. Fresh fruits and vegetables are cornerstones in healthy diets and essential parts of global strategies such as the WHO's One Health concept.





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Embrace a balanced future

Growing & supplying high quality fresh produce

In recent years the European Institutions have been pursuing higher goals for sustainability. To supply safe food in a sustainable manner, the European Commission proposed multiple initiatives such as the draft Regulation on the sustainable use of plant protection products, the action plan on the expansion

of organic land in the EU or the proposal for a regulation on packaging and packaging waste. For a successful outreach of these policies, some key prerequisites are needed, and these are what guide Freshfel Europe's position:



Policy coherence: Interconnected objectives set under different policy initiatives affect agricultural production and supply. If implemented unilaterally they result in a limitation of tools to produce food in safe and sustainable ways.



Financial support: The new CAP could add to growers' efforts of better protecting orchards against the consequences of climate change and to be more energy efficient in orchards, greenhouses and sorting, packaging and storage facilities.



Research and Innovation: Research and innovation play a paramount role in providing growers with the right toolbox for growing safe and fresh produce across the European Union. Faster procedures and more flexible rules are needed at the European and national levels to guarantee that sufficient and efficient biocontrol plant protection products are placed on the market to substitute chemical PPPs.



New technologies: The Farm to Fork Strategy, and in particular the Biodiversity Strategy for 2030, suggests that biotechnologies may support the objective of increasing the sustainability of the agri-food sector and helping reduce its dependency on pesticides. Moreover, several NGT plant products could contribute to the objectives of the Green Deal, the Farm to Fork and Biodiversity Strategies, and the United Nations Sustainable Development Goals by making the agri-food system more resilient and sustainable.



Transition: to protect crops and secure accessibility to the necessary tools for protecting crops, transition times are needed to introduce efficient alternatives.



Freshfel Europe supports the Commission's objective of maintaining a high level of protection of human and animal health and of the environment while enabling safe plants to provide benefits and contribute to the innovation and sustainability objectives.

Philippe Binard, General Delegate



Fresh produce growers should be provided with a safe and efficient toolbox to grow and protect crops during production and transportation. This is essential for food security. Due to climate change, production has to cope with increased pests and threats.



Local at heart, *Global by nature*

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Confidence in quality & safety

Securing consumer confidence in food safety is essential in the fresh fruit and vegetable sector. Monitoring of existing and changing legislative requirements on active substances and maximum residue levels, microbiological risks, food additives, biocidal products, fertilisers, sanitisers and contaminants is crucial in the daily work of the Freshfel Europe Secretariat and its members.

In response to the goals set in the Farm to Fork Strategy, European Commission has moved forward with different regulatory initiatives, such as the draft proposal on sustainable plant protection products (SUR) and lowering of the maximum residue levels of substances identified as being of global environmental concern ('mirror clause').

The SUR proposal has been discussed by the Czech Republic's Presidency of the Council of the European Union, followed by the Swedish Presidency. Freshfel Europe engaged in discussions with the two presidencies to express the concerns identified by the industry. Even though Freshfel Europe supports the European Commission's Farm to Fork Strategy and consequently the initiative to lower the use of chemical PPPs and other initiatives to set out relevant ambitions and actions to stimulate sustainable food production, Freshfel Europe requests the policymakers to achieve the goals by imposing rules which are realistic in terms of their application and time framework, while also providing the European growers with



Freshfel Europe aims for full compliance with European legislation on food quality and safety while minimising the use of chemical plant protection products and moving towards better and more sustainable agricultural production practices.

Eglė Baecke,
Director Food Quality & Security



sustainable economic return and that works in a global perspective for exports and imports.

Numerous meetings are organised every year to provide members with knowledge on horizontal food safety matters as well as ad hoc emerging matters.

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.





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Positioning fresh produce in EU quality schemes

The recent growth of supply was absorbed by a steadier demand during COVID and immediate post-COVID. However, since the end of 2021, and after the economic crisis resulting from the war in Ukraine, the purchasing power of consumers has been impacted. Across Europe, sales of premium products are under pressure as demand for higher quality, specific patented varieties, ready to eat, PGI or organic products plummeted. For the coming months a lot of uncertainties remain regarding the growth of these segments and the good balance between supply and demand.

Pressure on organic growers is increasing as demand and market prices do not cover costs and differential with conventional products. The ambition of transitioning 25% of land to organic farming is challenging as growers tend to move back to conventional. In this respect, the "EU Action Plan" to balance the growth of supply with a growth of the demand is important for a sustainable development of the segment.

Freshfel Europe has held meetings with its members and the European Commission to discuss production rules and tools, trade rules and reinforced import controls and the EU action plan.

Regarding trade, Freshfel Europe closely followed the Commission's reassessment of the risk of occurrence of non-compliances. Additional controls are set for fresh produce, including on bananas from Ecuador and Peru, avocados from Mexico, pomegranates and strawberries from Turkey.


Still on EU quality marks, Freshfel Europe is following the upcoming reform of the PGI-PDO scheme which is expected to be concluded by the end of 2023. The reform will aim at strengthening the GI system by increasing the protection of GI, also in social media and on the internet in general. There is a need for more administrative flexibility and a shortening of the application process. Furthermore, Freshfel Europe is concerned regarding the relevance of the applications being handled by the EUIPO.



Freshfel Europe is staying in touch with its affected members.

The Farm to Fork Strategy has among its ambition to grow the share of organic land to 25% by 2030. This is currently far from reality. Organic fresh fruit and vegetables currently account for 5-6% of the supply of the assortment and are progressively growing as volumes in conversion are becoming fully organic.





The Guide to a Healthy Generation



As a member of Freshfel, Fresh Produce Centre Netherlands is working on five ambitions.

Health

Healthy Diet, Lifestyle, and Food Environment

Promote health, prevent disease, and increase physical, mental, and social well-being of Dutch citizens, so that the sector can set an example for other countries.

Sustainability

Striving for Progression in a Sustainable Food System

Reduce the environmental footprint of fruit and vegetables, promote nature and biodiversity, and increase circularity.

Market & Economy

Innovation in the value chain

Strengthen the trading position, from production to sales, and contribute to prosperity and employment.

Social

Social value far beyond our national borders

Help increase the financial, physical, and social well-being of growers, employees, seasonal workers and stakeholders, far beyond our national borders.

Food Safety

Safeguarding food safety

Promote the food safety culture in the entire chain, and control the chemical, microbiological, and physical risks of fruit and vegetables.

Towards a new packaging & labelling environment

Freshfel Europe welcomes the European Commission's proposal to create a Union-wide packaging regulation. EU legislation should allow cost-effective solutions, soft transitions towards innovative alternatives and be supportive of strategies on food waste or stimulation of plant diet, enhanced by appropriate labelling information to consumers. EU-harmonised packaging legislation would also guarantee a well-functioning internal market and prevent waste of materials and other resources for re-packaging at borders.

//

There is a need for coherence in packaging and labelling policy to move towards plant diets without obstacles.

*Joanna Nathanson,
Policy Advisor International Affairs,
Sustainability & Communications*

//

Freshfel Europe repeatedly underlines the sector's commitment towards a more sustainable packaging system. The multiple functionalities and benefits of packaging should not be disregarded: protection against biological and physical damage, prevention of premature deterioration, improved shelf life of products, marketing, and providing information

to consumers on origin, nutrition, climate and environmental impacts and storage or cooking tips.

The success of the "Green Claims Initiative" proposal from the Commission is therefore connected to the packaging policy as packaging legislation might hinder the possibility of adequate labelling of fresh produce, limiting the opportunities to highlight the assets of fresh produce.

A similar conflict between strategies and policy priorities can also follow from the modification of marketing standard rules for fruits and vegetables. Namely, the proposal to extend origin labelling for pre-cut fruit and vegetables (for single and multiple-ingredient products). Freshfel Europe addressed numerous concerns related to the proposal due to its adverse effects: increased manufacturing cost, increased cost for consumers, plastic packaging waste, limitation of outsourcing raw materials, limited relevance of the information, etc. While the initiative is based on the objectives set by the Farm to Fork Strategy the outcome of the proposal, if implemented, would contradict other objectives under the same strategy, such as stimulating plant-based diets and increasing consumption of fruit and vegetables.

As Europe moves towards a new packaging environment. The fresh produce sector aims to remain at the forefront of sustainable and practical solutions, reducing plastic usage or packaging as much as possible, without compromising on quality or putting health or food safety at risk.



A Commission proposal considers banning single use packaging for less than 1,5 kg. Today, 50% of fresh produce is already sold in bulk and fresh produce packaging only represents 1,5% of food packaging at the retail level.



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Building transparency & accountability

Until now, efforts within the sector to address product sustainability through environmental footprint have been highly fragmented. Therefore, Freshfel Europe and its members have embarked on a collaborative initiative to develop an environmental footprint methodology and digital tool for fresh fruits and vegetables.

A proliferation of schemes is not desirable. Setting a common standard for fresh produce would avoid market confusion and greenwashing that could lead to product mistrust. Freshfel Europe's environmental footprint initiative is the alignment with the Product Environmental Footprint (PEF) methodology as recommended by the EU. The initiative will allow comparison between different products and

EU legislation requires environmental footprint accountability and there is an increasing demand along the supply chain for product sustainability.

increase transparency in the supply chain regarding sustainability.

Beyond environmental accountability, the initiative will have numerous returns on the investments for fresh produce operators, namely:

- Respond to customers' expectations regarding LCA and environmental footprint performance (verifiability, accountability) for business operators.
- Consolidated information for companies' sustainability reporting.
- Credibility and measurement of the entire sector collectively.
- Access to public subsidy when the demonstration of sustainability will be required (CAP, etc.)
- Access to finance when banks and financial institutions will subject access to loans to a sustainable business approach and environmental accountability.

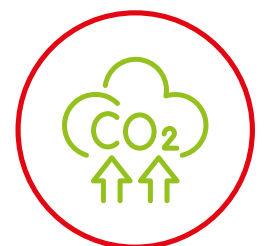
The fresh produce sector is also preparing for the Corporate Sustainability Reporting Directive (CSRD) which came into force at the beginning of this year. Although the reporting obligations of the CSRD will initially only apply to large companies, Freshfel Europe is aware of the trickle-down effect it will have on all operators in the supply chain.

In the coming year, Freshfel Europe will, together with its members, continue its work to build efficient reporting structures. Through its membership in the European Financial Reporting Advisory Group (EFRAG), Freshfel Europe is also part of discussions on the formation of sector-specific reporting standards for agriculture.



There is a growing need for a standardised environmental footprint methodology for the fresh produce sector.

Gil Kaufman, Project Management & Market Analysis Advisor



Berlin 7|8|9 Feb 2024

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Operating in a changing trade environment

The fresh produce sector has faced numerous challenges over the course of the last year, impacting both intra-EU and international trade. The economic impact of the Russian invasion of Ukraine, the lasting consequences of the COVID-19 crisis, a resuming protectionism, and a process of deglobalisation have been the main drivers in the last months.

Increased costs in everything from fuels to energy and material have had a substantial impact on operations on all continents. The post-COVID boom in logistics demand led to a 7.5% increase in port and hinterland congestion and a 25% backlog on new vessel orders. In addition, the combination of a significant deficit in available truck drivers and increased strike actions worldwide has negatively impacted the flow of perishable products. Additionally, on-route hubs and slow-steaming practices are both leading to longer journey time detrimental for perishable products. The sector aims to mitigate these challenges while pushing forward on decarbonisation and sustainable solutions. Part of this work includes considering the impact of the EU ETS and the CBAM to promote sustainable transport, and the optimisation of multimodal transport networks to reach consumers nearby and in distant destinations.

Regarding market access, Freshfel Europe's activities looked both at export and import challenges. For export, efforts focused on opening new markets as part of the market diversification needed due to geopolitical market closure and proliferation of SPS barriers. The upcoming rules for export to the UK post-Brexit are also closely monitored. For import, efforts focused on closely monitoring the impact of F2F on imports and to accompany suppliers to best adjust to new market access conditions as well as customer's requirements. A close follow up of EU plant health requirements for import is undertaken to secure safe trade flows into the EU.



Freshfel Europe is urging EU institutions to eliminate pending barriers and obstacles through the FTA negotiations. Freshfel Europe supports the Commission's economic diplomacy initiatives and actively takes part in various missions.

**David Fernández,
Policy Advisor Agriculture & Trade**



Freshfel Europe's activities consist of actions both at multilateral and bilateral levels. Freshfel Europe has voiced concerns to the WTO on the need to reform the SPS regime and called on the IPPC for additional standards and digitalisation of certificates, and has actively taken part in various EU trade missions to work towards eliminating existing trade barriers and obstacles for the fresh produce sector.

These changes include the elimination of impossible-to-meet import requirements or the introduction of clear guidelines to conclude PRAs in a timely fashion in the texts of FTAs or be better framed in the SPS agreements.



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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



HOOGSTRATEN

HOME OF QUALITY

Trade trends & developments

Intra-EU trade: 5 year trend

In 2022, intra-EU trade of fresh fruits and vegetables amounted to 29.16 million tonnes, worth 37.31 billion euro. Comparing figures to the previous year, this represented a decline in traded volume of approximately 750.000 tonnes, but an upswing in value of 4.6%. As a result, the value of each traded kilo increased to 1.28€/kilo.

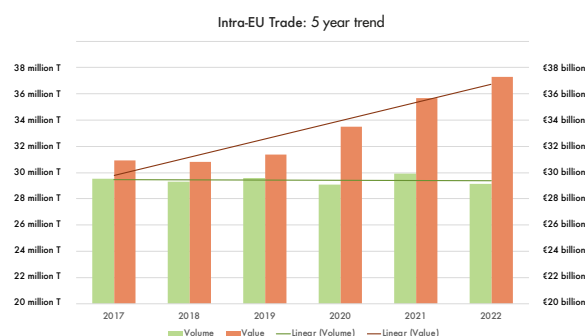
Intra-EU trade trends since 2017 show a marked increase of traded value over time whereas volumes have remained stable.

The largest suppliers for intra-EU trade were Spain (9.8 mio. T), the Netherlands (7.3 mio. T) and Italy (2.6 mio. T). The largest recipients were Germany (7 mio. T), France (3.8 mio. T) and the Netherlands (2.4 mio T).

Compared with the previous year, all the major shippers of fresh produce trade in the Single Market

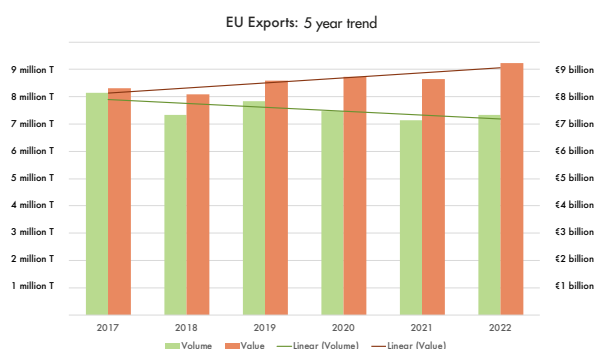
reported lower volumes, except Greece, Poland and France which experienced growth.

Trade within the EU was marked by the growth of bananas (10%), watermelon (21.7%) and some citrus fruits, whereas the trade of apples (-10.1%), kiwis (-6%) or mandarins (-6%) has shrunk since 2016.



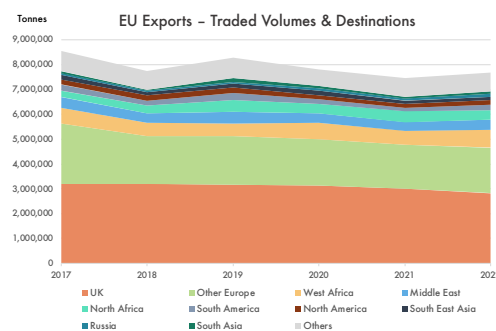
EU exports: 5 year trend

In 2022, European exporters traded 7.32 million tonnes of fresh fruits and vegetables, worth 9.24 billion euros. EU exports sharply increased in value (6.75%) and moderately in volume (2.44%). The increase in value was in line with the general trend since 2019 whereas the uptick in the volume export put an end of the three continuous years of declining export volumes.



Despite the Russian invasion of Ukraine and new difficulties in exporting to Egypt, one of the main outlets for EU exports, overall export figures have remained largely stable, thanks to the increasing

diversification of EU exports. This tendency towards greater diversification is marked from a move away from the EU's immediate neighbourhoods towards new market opportunities in West Africa (+12.7%), Central America (+63.1%) or South Asia (+56.8%), where growth since 2017 has been significant.



Compared to 2021, European exports have continued to shift away from the United Kingdom (2.83 million T in 2022, a decrease of -5.45%) or Belarus (197,768 T, or -46.1%). The difficulties in exporting to Egypt

due to the imposition of the letters of credit to export resulted in a 25% drop in the volume of exports.

However, as in previous years, the main outlets for EU fresh fruit and vegetable exports remain the EU's

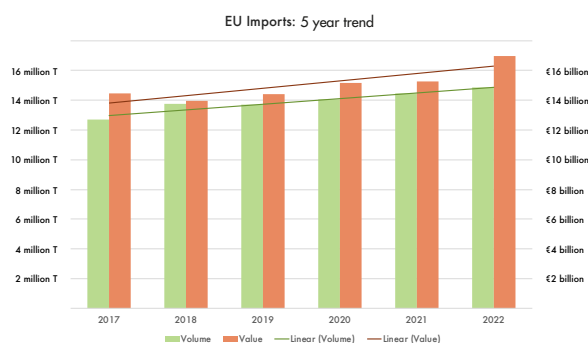
European neighbours, despite a slight 2.5% decrease in 2022 compared to the previous year. The United Kingdom, in particular, as the largest neighbouring country, still represents the destination for around 39% of all EU exports.

EU imports: 5 year trend

In line with previous years, 2022 marked the third consecutive years of increased import values, with a volume increase of 2.82% (14.7 mio T in 2022 vs 14.5 mio T in 2021). In terms of value, the year was also one of continuity, as the value of imported fresh produce continued to rise. However, the hike in value was remarkably sharp, with a marked 11.24% increase, likely caused by the higher production and logistical costs. In figures, this means that imports were worth 17 billion euro in 2022 compared to 15.28 billion the previous year.

This tendency has been increasing over the last few years, as the share of imports originating from the top five exporters to the EU has decreased. Nevertheless, the general increase in import volumes can be seen across the board, as all major origins (except Ecuador and Brazil) expanded their trade with the EU, although the intensity greatly varied, ranging from negligible increases like Turkey to sharp rises in the cases of Morocco (13.7%) or South Africa (16.3%).

However diversified the origin is, it is still true, as in past years, that the EU imports one fresh product above others, the banana, which represent one third of all imports. The preponderance of banana exports explains the outsized share of exports to the EU coming from Central and South America, which account for roughly half of all the volume coming into the Union.



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Sicilian Experience



Etna's oranges from Sicily: life energy around the world.

Oranfrizer is one of the few companies in Sicily which control the entire food chain, checking the activities in the fields and the ripening of the citrus fruits, managing the processing of the fruit and the packaging of the juices.

In the Oranfrizer products you can find the care, the passion and the know-how of a Sicilian family which has been dedicating itself to the blood oranges growing in Etna plane, the highest active volcano in Europe, and the other citrus development for three generations.

And today, thanks to the entry into the Unifrutti Group, Oranfrizer can multiply its presence in the markets, to reach even more consumers and make Oranfrizer products citizens of the world.



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Tel +390957937111 | www.oranfrizer.it | oranfrizer@oranfrizer.it



Freshfel Europe's market intelligence tools

The importance of including at least 400g of fresh fruits and vegetables in your diet daily to reduce risks of obesity and non-communicable diseases is well established. To systematically analyse the trends of fresh produce consumption trends in Europe, Freshfel Europe releases its Consumption Monitor annually.

This year, this unique report has been redesigned to make the information even more accessible. This year's monitor shows that the average consumption in Europe is 364,5 g/person/day, which is still well below the recommended minimum target of 400g/day/person by 10%. Preliminary forecasts suggest that this number is going to reduce even further in the coming years due to the economic crisis impacting the purchasing power of consumers.

Freshfel Europe is determined to keep actively advocating the essentiality of promoting the

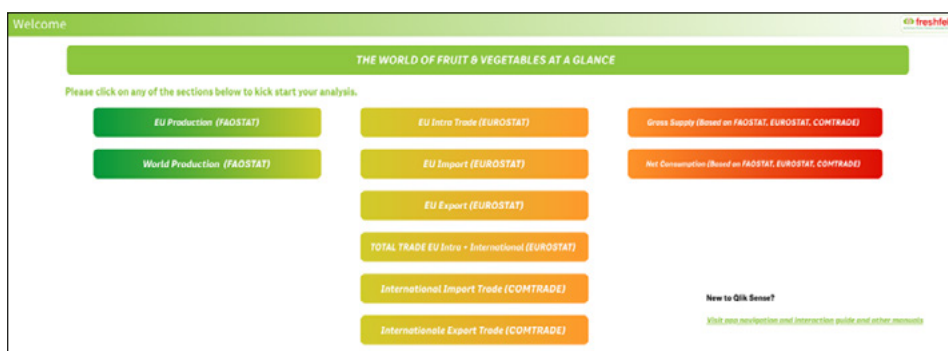
consumption of fresh fruits and vegetables. Increased consumption would not only benefit human health but also decrease economic and social pressures on healthcare systems and reduce the environmental impact of food production.

The Consumption Monitor¹ is based on data from our statistical intranet, which is another of the many efforts undertaken by Freshfel Europe to provide information and statistical knowledge in a comprehensible manner.

In late 2022, this internal statistical system was updated to QlikSense. With a new, more user-friendly interface, members of Freshfel Europe can now with ease navigate production, market, and intra-EU and international trade data, adjusting for a range of variables such as for instance product flows, seasonality months/years, destinations, etc.



Example screen from Consumption Monitor



Home page of QlikSense interface

¹ The Freshfel Europe Consumption Monitor is a service offered to Freshfel Europe's members but can also be purchased by non-members at a rate of EUR 2500. You can order the Freshfel Europe Consumption Monitor 2023 by contacting g.kaufman@freshfel.org or info@freshfel.org.



Fresh from field to shelf

At Port of Antwerp-Bruges, we have only one rule when it comes to serving fruit: fresh is best. That's why we focus on short transit times and short intraport stays. With a strategic inland location, experienced staff and convenient at-the-port handling, we guarantee you won't lose time (or nutrients) along the way. Now isn't that cool?



**Port of
Antwerp
Bruges**

In tune with the world

Consumption built on image & education

Boosting consumption: Time to act!

Freshfel Europe and its members are strongly engaging in European promotion policy initiatives. With more than 205 programmes in the last 5 years, our sector is the main beneficiary. While the promotion policy is being revised, Freshfel Europe will seek to secure greater efficiency with more visibility for brands and origins and, most importantly, secure the continuity of marketing activities by representative organisations. The ambition of the F2F to move to a plant diet should be reflected in an increased budget for fresh produce.

Together with Interfel and Bord Bia, Freshfel Europe is part of the “Life is Better with Fruit and Vegetables”. The campaign targets millennials to increase their nutritional knowledge. Young Europeans aged 25 to 35 represent a key demographic consumer segment, who are still shaping their purchasing and eating habits. The campaign will run until February 2025.



Educating the youngest generation

Freshfel Europe supports the EU fruit and vegetable scheme to increase consumption among school children. The scheme funded with 130 Mio € provides fruit and vegetables in schools as well as educational activities to build healthy eating habits. This programme is particularly important as the average EU fruit and vegetable consumption among schoolchildren is estimated to be below 200g per capita per day.

Freshfel Europe has been playing an active role in the support of the EU school scheme since its launch in 2009. Freshfel Europe reminded its position and support at the November 2022 Commission conference “EU school scheme fit for the future” with Member States and contributed to the consultation for the reform of the scheme.



While the Farm to Fork Strategy is aiming to move food consumption towards a more plant diet, tools and budget remain limited to match this ambition. Lack of action has a huge cost! According to the World Economic Forum, for each € spent on food, two are needed by social security to rectify the consequences of unhealthy eating habits. It is time to act!

**Philippe Binard,
General Delegate, Freshfel Europe**



Sustainable fruit labeling solutions

VARIETY

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

BRANDING

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

IDENTIFICATION

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

ORIGIN

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



SUSTAINABILITY

Demonstrating commitment to sustainability with industrial and home compostable label solutions.

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.

label@sinclair-intl.com
sinclair-intl.com



Preparing for the future

Sector's crisis preparedness

The COVID-19 crisis prompted the fresh produce sector to adapt to quickly changing production and trading environments. The pandemic also urged the European Commission to establish an Expert Group on the European Food Security Crisis Preparedness and Response Mechanism (EFSCM). The platform is run by the European Commission and is represented by industry stakeholders and EU Member States.

Freshfel Europe submitted a joint application with the European Sprouted Seeds Association and together were granted full membership status. The objective of the group is the coordination and cooperation on any food security related incident as well as to build tools to cope with any future challenges to which the food sector might be confronted.

In the context of the current geopolitical situation the European Commission convoked its activities by discussing the aggression in Ukraine. While Ukraine and Russia are key suppliers of agricultural products, the European fresh produce industry has experienced crisis due to energy price increase as well as price increases for other production inputs. This resulted in pausing of indoor operations in various European Countries and rerouting of supply of goods.

Consequently, the EFSCM has launched three subgroups and Freshfel Europe became a member of subgroups on 'improving the diversity of sources of supply' and 'Dashboard for the monitoring of food supply and food security'.

Freshfel Europe is in close contact with its members and the services of the European Commission to address all the issues related to supply of fresh produce, either resulting from recent geopolitical events or other issues that the sector is challenged with, such as incoherence of different policy initiatives which could result in devastating outcomes.

Freshfel Europe is contributing to subgroups on 'improving the diversity of sources of supply' and 'Dashboard for the monitoring of food supply and food security'.

Freshfel Europe is eager to continue its alliance with the European Commission to support the functioning of the Expert Group to provide advice and expertise to the European Commission services, exchange experiences and good practices, discuss contingency plans, assist the European Commission in the preparation of policy initiatives, and develop recommendations relevant to Union preparedness for crises on a case-by-case basis.



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BURSTING

with natural goodness



Grown and harvested following the 'Zespri™ System', Zespri™ kiwifruit meets the most stringent quality and environmental standards.

The Zespri™ label on each kiwifruit guarantees wholesome kiwifruit of the best quality with a consistent and perfect taste.

MAKE YOUR HEALTHY *irresistible*



A new face for fresh fruit & vegetables

Too many obstacles remain to boost the consumption of fresh fruit and vegetables despite a unique momentum. Freshfel Europe is committed to playing a leading role to foster and protect the positive image and assets of fresh fruit and vegetables and highlight the essential role of the sector.

To move forwards, a “new face” for fresh fruit and vegetables needs to be designed. Concrete actions are needed to:

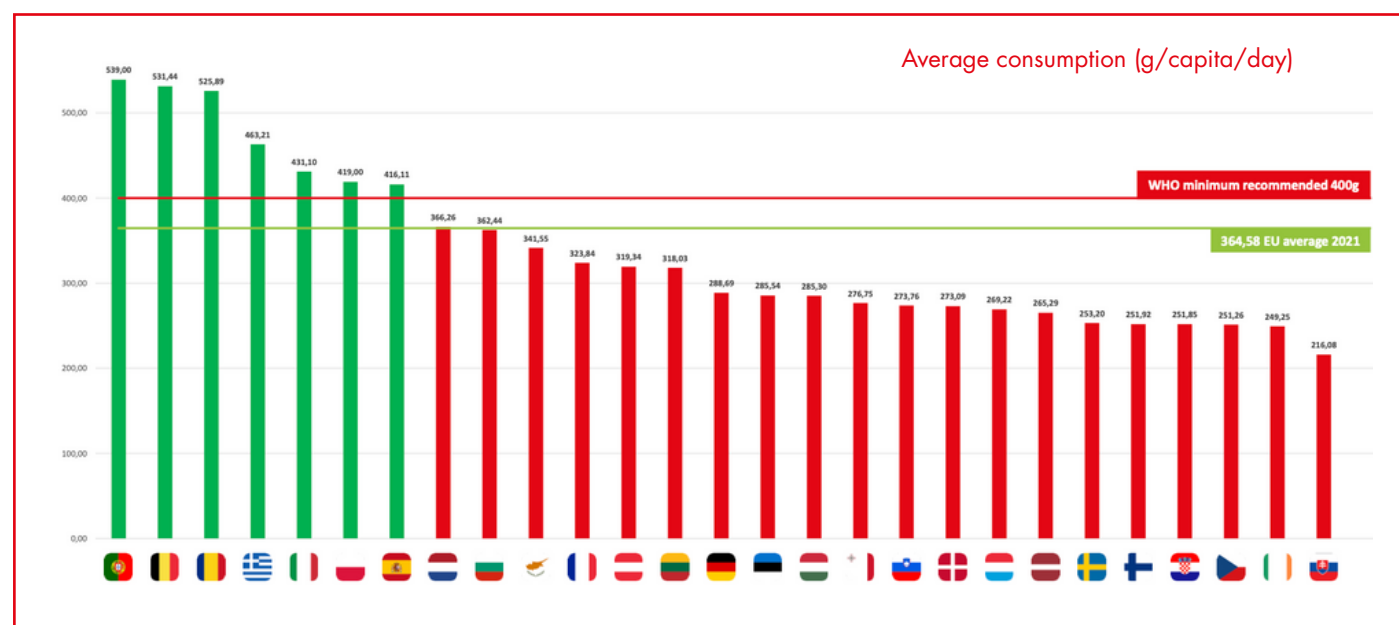
- position fresh produce as essential goods, part of the solutions of the Green Deal and associated strategies such as the Farm to Fork Strategy and EU beating cancer plan.
- secure policy coherence and avoid new regulatory obstacles to move towards plant diets.
- demystify fresh produce misperceptions. Fresh produce is not expensive and remains among the most affordable food categories.
- reinforce the undisputed safety assets and exceptional nutritional and health benefits of fresh produce.
- value assets in terms of low environmental impact thanks to IPM techniques, responsible use of active substances, good agricultural practices, biodiversity and soil protection strategy, precision farming and water usage.

- guarantee food security in the emerging consequences of climate change by better protecting fresh produce production against climatic havoc.
- consider the role of fresh produce as raw material with not only limited CO2 emissions but as instrumental for European carbon neutrality by 2050.
- stimulate fresh produce consumption across all age groups and in particular the millennials and the youngest. According to Eurostat 33 % of the European population does not eat any fruit or vegetables every day and only 12 % reach five portions.

Freshfel Europe is committed to addressing all the obstacles and barriers that limit consumption daily. Increasing consumption to the minimum recommendations of WHO will be a multiple win, not only for the European policy strategy but also for the planet, for the European consumers and the fresh produce sector.

Let's all join forces in Freshfel Europe and contribute to the challenge of building this new face for fresh produce together, building on its undisputed nutritional and environmental assets.

A diet with 5 portions a day or half of the plate with fruit and vegetables can be achieved by less than €2 per person per day. Comparatively, for public expenditure of social security, the cost of unhealthy diets results to be twice as high of the total food market value, corresponding to €6 trillion expenditure for social security in the EU according to the World Economic Forum.



A HEALTHY MESSAGE
FROM EUROPE

LIFE IS BETTER

with Fruit & Vegetables

MARCH 2022 - FEBRUARY 2025

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BORD BIA
IRISH FOOD BOARD



CAMPAIGN FINANCED
WITH AID FROM
THE EUROPEAN UNION

**ENJOY
IT'S FROM
EUROPE**



Freshfel Europe member benefits

Freshfel Europe members are at the forefront of fresh produce sector developments.

Continually 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.

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.

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.

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.

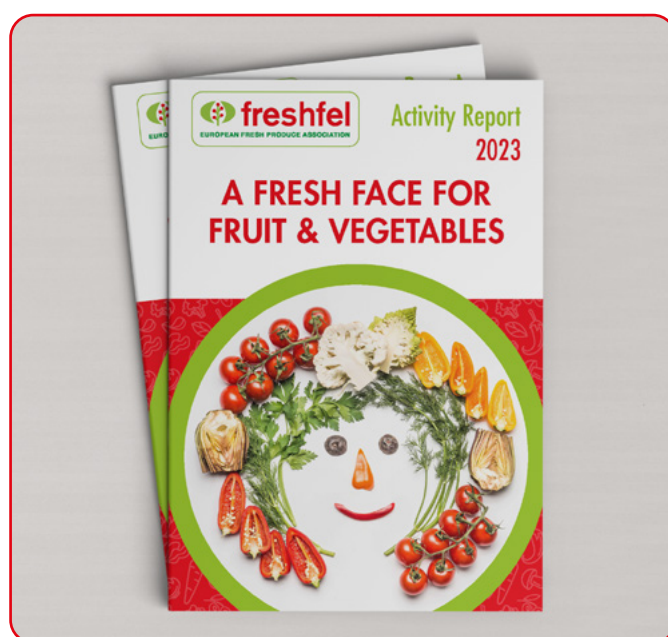
Network and connect with leading stakeholders

- Network with the sector's leading players at Association events.
- Connect with like-minded business professionals through knowledge sharing in Association meetings and discussions.

Be a sector leader

- Stand out and get noticed as an active member of the EU and global fresh produce community.
- Preferential and free access to Freshfel Europe's exclusive working groups, topical events and Annual Event.

Building a strong Association to build a stronger position, voice and image is more than ever essential today. Not yet a member joint today these collective efforts of the sector to grant to the sector the position it deserves in the food environment and build a stronger image of sector and its great diversity of fresh fruit and vegetables.



Freshfel Europe members

Full members



ANEEFEL



bāma



BEL ORTA
redefining fruit & vegetables

BEST FRESH GROUP



BORD BIA
IRISH FOOD BOARD



coop Trading





Associated members





International associations



Not on the list yet?

Become a Freshfel Europe member

Become a member of Freshfel Europe, the European Fresh Produce Association!

Freshfel Europe is the leading EU and global association for the fresh fruit and vegetable industry.

Be part of this unique EU-wide and global network to:

- Increase your business potential.
- Get your voice heard at EU and international levels on key on-the-ground and policy issues.

All Freshfel Europe members have access to a large array of resources as part of their membership:

- Tailored regulatory and non-regulatory information provision.
- Platforms for policy and topical exchange.
- Sector news.
- Networking opportunities.

Thinking of becoming a member?

More information about membership is available via the Freshfel Europe website at www.freshfel.org or contact the Freshfel Europe Secretariat.



www.freshfel.org



info@freshfel.org



+32 (0)2 777 15 80



Rue de Trèves 49-51, Box 8,
Brussels, 1040, Belgium

@freshfel