

FRESH PERSPECTIVES, GROWTH OPPORTUNITIES

Boosting Fruits & Vegetables in the European Skyline



FRESHFEL EUROPE'S ACTIVITY REPORT 2024

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 2023 to May 2024. It synthesises the areas of work and activities of Freshfel Europe over the past 12 months. More importantly, it looks forward to the new challenges and opportunities that will arise from the new European legislative term 2024-2029. This report showcases the efforts of the Association to represent and advocate for the entire European fresh fruit and vegetable supply chain, from production to retail. It designs the priorities with a focus on fresh perspectives and growth opportunities for the sector in turbulent times.

The activities correspond to the input given by the President 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 all the members to guide the work and priorities of the sector.

Professional business advice, operational knowledge, and day-to-day business perspectives provided by members extensively contribute to the daily work of Freshfel Europe's Secretariat. The strength and reputation of Freshfel Europe are built through the invaluable input of members in the fresh produce supply chain, constantly keeping the specifics of fresh fruit and vegetables at the center of priorities. Freshfel Europe is a membership-driven association. Freshfel Europe's activities are funded by membership fees. All companies and associations of the European fruit and vegetables sector are invited to join forces by joining Freshfel Europe for mutual win-win benefits and to further reinforce the voice of the sector at the European level.



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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FRESHFEL EUROPE PRESIDENT

The second year of my Presidency was marked by a continued uncertainty for businesses and the ongoing succession of crises of different kinds: energy, climatic, logistic, geopolitical, scarcity of human and natural resources, 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 interests of the sector.



"A fresh face" for fresh produce was our ambition for the last year. The sector still needs to improve the image of fresh produce and attract consumers based on its assets. Fruit and vegetables were the heroes during the COVID-19 pandemic, reconciling consumers with their health and the environment. The pandemic generated a consumption growth, which quickly started to decline in early 2022 with the outbreak of war on the European continent. This caused rising costs, impacting the sector and the consumer's purchasing power. This challenging trend has continued throughout 2023 and in the first quarter of 2024.

Fresh fruit and vegetables remain part of the solution to societal concerns. The sector showed resilience and capacity to supply a diversity of quality fresh produce to consumers in the European Union and beyond.

Building "a fresh face" for fresh produce was also challenged by an incoherent and inconsistent implementation of the Green Deal, driven by emotion instead of well-designed and business-friendly transformation mechanisms to guide the European food system into a more sustainable model. The strategy lacked leadership and was done in great confusion, without the necessary transition

time or alternative solutions. While being an essential part of the solution to the Green Deal, fresh produce was targeted by policy makers in what can be described as a "therapeutic fury". Instead of suggesting legislative measures for a shift to a plant-based diet, the fresh produce promotion budget was cut, fresh produce lost productivity given the lack of tools, and fruit and vegetables are the only food sector penalized by the new packaging legislation. This, despite already selling 50% loose and only contributing to 1,5% of packaging at the retail level.

Fresh fruit and vegetables remain part of the solution to societal concerns. The sector showed resilience and capacity to supply a diversity of quality fresh produce to consumers in the European Union and beyond. In Freshfel Europe, we are convinced and proud of the assets of fruit and vegetables. We are confident that the sector can be successful by adding business perspectives to "fresh perspectives" and "growth opportunities". Our Annual Event in Paris and this Activity Report

give way to this new impulse for the sector based on its undisputed health benefits and low environmental impact – essential pillars of a sustainable food system.

I call on all the European fresh produce sector to join forces and unite voices behind those perspectives of Freshfel Europe. The new legislative term can bring new growth opportunities to boost the role of fruit and vegetables on the European agenda.

Many thanks for your support.

Salvo Laudani
President of 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, exporters, logistics providers and retailers. It's actions are reinforced by service providers as associated members. Freshfel Europe is a non-profit association under Belgian Law, registered in the EU Transparency Register.

Our core objectives

Represent the interests of the European fresh fruit and vegetable sector are well-represented and ensures that the sector has a strong voice in Europe and globally.

Ensure that 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.

Position fresh produce in all policy areas and represent the sector's priorities.

Stimulate consumption and promote the health and environmental benefits of fresh produce.

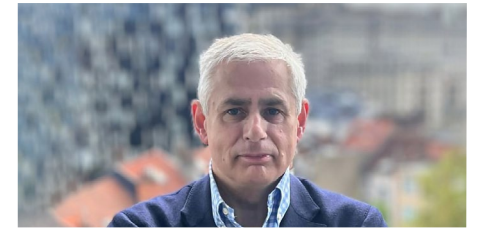
Keep association's members abreast of multiple policy initiatives to jointly build consensual and comprehensive positions and to facilitate collective actions.

Freshfel Europe member benefits

Freshfel Europe members are at the forefront of the produce sector development.

- Continuously** gain knowledge.
- Increase** your business potential.
- Get** your voice heard.
- Exclusive** data access.
- Network** and connect with leading stakeholders.
- Be** a sector leader.

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



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General Delegate



Eglé Baecke
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Head of Sustainability & External Relations



Linda Bloomfield
Membership & Marketing Support

“WHAT IS ESSENTIAL IS INVISIBLE TO THE EYE”

(Antoine de Saint-Exupéry)

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

LOCAL PRODUCTION. Our fruit and vegetables are grown in Europe, ensuring maximum freshness, optimum ripeness and a smaller carbon footprint.

The land is our life. As growers, we work and care for it, promoting **SUSTAINABILITY.** We look after the environment and improve the quality of life of people in rural areas.



F&V AS AN ESSENTIAL SECTOR

Freshfel Europe's focus areas:

Sustainable food system

The Green Deal

One Health

Farm to Fork

Food2030



Fresh Perspectives

Fresh fruits and vegetables are key in succeeding with the EU goals of the Green Deal, the Farm to Fork and the One Health approach, and are cornerstones in sustainable food systems. It is further recognized in the Food2030 strategy, which aims to guide the research and innovation needed to create a shift towards healthy, sustainable and inclusive food systems, that in order to achieve this within the planetary boundaries the consumption of fresh fruits and vegetables must be more than doubled.

Making more... Fresh produce is the food category bringing you among the highest nutritional values, bringing a range of health benefits, increasing quality of life and lifespan, offloading the healthcare systems by preventing non-communicable diseases and contributing to an active employment environment. At even earlier stages, production of fresh produce demands little land surface compared to many other food categories, and the fields and orchards can serve as dual-use areas, also providing renewable energy and areas for grazing.

Fresh produce has the smallest environmental footprints among food categories. Use of water, plant protection products, land, and carbon emissions, are among the lowest in the food systems.

...With less. Fresh produce has the smallest environmental footprints among food categories. Use of water, plant protection products, land, and carbon emissions, are among the lowest in the food systems, and work within the planetary boundaries. Throughout the supply chain, fresh produce aims to create a circular system with a minimal amount of waste. This includes minimal possible use of single-use packaging, even when it is close to 100% recyclable. It also includes minimizing food waste both in the value chain, and educating consumers on how to minimize waste once the products reach their homes.

Growth Opportunities

Support efforts for progress. The fresh produce sector continuously aims to improve and adapt to upcoming challenges. Through active participation in Promotion programmes the sector aims to educate consumers on the value of fresh produce. Through investments in equipment, seeds and research, the sector work hard to continue to supply fruits and vegetables even in times of climate change and extreme weather. These efforts must be supported, valued, and facilitated by regulatory measures.

Acknowledge the key role of fresh produce in sustainable food systems. In both European and international research reports, the need to shift to more sustainable diets is declared time and time again. Fresh fruits and vegetables are always mentioned as essential in this shift. They must be acknowledged as such also in legal and policy-related circumstances.



ASSOMELA

ASSOCIAZIONE ITALIANA PRODUTTORI DI MELE



ECONOMIC SUSTAINABILITY FOR

FRESH BUSINESS PERSPECTIVES

Freshfel Europe's focus areas:	Economic sustainability	Supply chain approach
Industry coordination	Operational reality	Taxonomy

Fresh Perspectives

Economic sustainability: EU strategies and policies affecting food sectors are often focused on environmental and social sustainability. While this is a necessity, too often the economic part of sustainability has been disregarded. Shifting to more environmental and social sustainable practices is an investment not all operators can afford, and neglecting economic sustainability and feasibility in turn hampers this transition.

Operational expertise: While scientific research can take you far, operational expertise is key when it comes to handling natural products. Fresh fruits and vegetables include products with vast differences and particularities in what they need, or don't need, to be able to be presented to consumers at top quality. Reports, impact assessments and research must be accompanied by practical experience and field tests. An area where Freshfel Europe and its members are highly qualified to assist.

Growth Opportunities

Acknowledge sector efforts: Freshfel Europe and the sector is already taking steps to stay proactive on policy implementations, consumer expectations and changing business realities, including climate change. Taking this proactive role means anticipating upcoming needs and solutions. The knowledge gathered from these exercises should be considered and informing future initiatives of policy and certification.

Market intelligence: Business progress is dependent on good intelligence from the market. On top of its own initiatives such as the Freshfel Consumption Monitor, Freshfel Europe contributes to the different market monitoring instruments of the European Commission.

This ensures a good flow of information on matters on for instance food security and food sovereignty.

Promote fresh produce values: Fresh produce are essential for sustainable diets, and are able to provide nutrition for a growing global population without exceeding planetary boundaries, and without causing unnecessary costs for health care systems. To support this shift towards global health and food security, the importance of fresh fruits and vegetables must be promoted through private and public initiatives.

Fresh produce is the food category bringing you among the highest nutritional values, bringing a range of health benefits, increasing quality of life and lifespan, offloading healthcare systems by preventing non-communicable diseases and contributing to an active employment environment.



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SHAPING AN ACCOUNTABLE & RESPONSIBLE SECTOR

Freshfel Europe's focus areas:

CSRD | CSDDD | Green Claims

EU Taxonomy

PEFCR | Certifications

Private standards



Fresh perspectives

Fresh produce has multiple assets for the current debate on sustainability and the sector consistently aims for improvement. It adapts the best agriculture practices according to circumstances, be it Integrated Pest Management, regenerative agriculture, organic farming or other. It plays an important role in biodiversity, represents an essential economic role in rural areas, has a low carbon footprint and contributes to carbon sequestration. It uses natural resources wisely and commits to a circular economy while minimising food loss and food waste. The sector needs to be accountable and transparent in a harmonised manner on these efforts, as well as where progress can still be made. This will secure access to finance, insurance, public subsidies while guiding the sector in perfecting its business model. This motivated Freshfel Europe to take several initiatives to build industry tools.

The sector needs to be accountable and transparent in a harmonised manner on these efforts, as well as where progress can still be made.

Freshfel Europe serves as a platform for coordinated and joint sector efforts toward transparency and accountability. By mobilizing the knowledge and ambitions of the fresh produce sector Freshfel Europe is currently

running two projects to this effect: one on creating a joint Double Materiality Assessment under the CSRD, and one on a common Environmental Footprint Category Rules for fresh fruits and vegetables (Fresh Produce PEFCR).

Coherent approach: Freshfel Europe emphasises the need for coherent and substantiated communication on the many assets of fresh fruits and vegetables. By engaging with the European institutions on matters of green claims, Taxonomy, and more, Freshfel Europe aims to contribute to honest, credible and trustworthy passing of messages to consumers.

Certification schemes to be aligned: Freshfel Europe works closely with its members in the assessment and evaluation of various certification schemes. With the guidance of the members, Freshfel Europe aims to avoid proliferation, maximise the value of certification schemes, and inform on the relevant needs and requests of the sector. Freshfel Europe takes steps to ensure that new certification schemes covering sustainability thoroughly reflect the priorities and

expectations of the sector and avoid duplication.

Growth opportunities

Leverage sector knowledge: Working together on the PEFCR and CSRD projects allows the sector to create a common foundation for assessing and understanding the features and traits of the fresh produce industry. This should be leveraged by regulators and private standard-setters when assessing and creating future requirements and recommendations.

Promote good practice and product assets: Freshfel Europe's ambitious work to foster a transparent and accountable sector must be acknowledged. Fresh produce is a key part of the move towards sustainable diets and food systems and the benefits must be promoted. It will also demonstrate the contribution of the sector to many of the Sustainable Development Goals of the United Nations and the leadership of the sector on the compliance journey to the Paris Agreement targets.

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RESPONDING TO CLIMATE CHANGE

Freshfel Europe's focus areas:	Productivity	Food security
Toolbox	Insurance	Monitoring

Fresh Perspectives

Climate change is more and more impacting the fresh produce business. It is leading to a sustained decrease in productivity and the availability of some crops is at stake and hence food security. Adaptation is urgent but investments are often lagging as not everyone is yet prioritising the matter.

Climate change is the cause of a wide diversity of havoc, from an excess of water to scarcity, from extreme and prolonged heat waves to late frost impacting advance flowering, and from hail to heavy wind damage. It leads to situations with losers and winners and no one-size-fits-all situation that needs to be addressed.

Adapting to climate change: The impact of climate change can be minimized by making the right decision in terms of resistant varieties to the new climatic conditions, by adapting orchards and fields, but also by securing growers the right tools to mitigate the proliferation of pests and disease resulting from climate change.

Growth Opportunities

Assessment: as part of the CSRD reporting, a climate impact assessment will need to be conducted. This will further raise awareness and the prevention steps to be taken by the sector to better mitigate the situation.

Technology: Research, innovation, and digitalization will be key to assisting the sector in its repositioning. Developing new varieties, understanding the new climatic dynamics, and better anticipating risks through more performant weather monitoring might contribute to better control of the situation.

Public-private partnership: Consensus and a common path must be reached between the sector and the competent authorities for the success of the transition with the right catalogue of tools. The partnership should also design new ways of mutual funds and solidary for the long-term resilience and adaptation of the sector for food security.

Climate change is the cause of a wide diversity of havoc, from an excess of water to scarcity, from extreme and prolonged heat waves to late frost impacting advance flowering, and from hail to heavy wind damage.





Let's grow together!

PAVING A FRESH WAY TO CARBON NEUTRALITY

Freshfel Europe's focus areas:

Sustainable and Regenerative Agriculture

Renewable Energy Integration

Carbon Capture Utilization

Carbon Capture and Storage

Carbon Trading

Fresh perspectives

The EU's environmental policy package is progressively focusing on sustainability within agriculture. As these policies evolve, the fresh fruit and vegetable sector is uniquely positioned to align with new initiatives around CCU, CCS, and regenerative agriculture. This can help the sector position itself at the helm of the push for a more sustainable and, ultimately, net-zero agricultural sector. Besides, the EU carbon neutrality can only be reached thanks to the carbon sequestration of forest and fruit trees.

European Green Deal: The push for a greener and more sustainable agricultural sector, which sets carbon neutrality as its main goal, creates a regulatory environment that can support the adoption of CCU and CCS technologies and their integration in agriculture, providing an additional revenue stream.

New Approaches to Agriculture: As part of the push toward a more sustainable and carbon-neutral agricultural model, the sector is abuzz with new



approaches to combine agricultural practices with sustainability, from the adoption of regenerative and precision farming practices to the integration of conventional farming with carbon sinks and renewable energy production. Improving orchard's soils is essential to improve carbon sequestration performance of the orchards, while growers need to plan new strategy for trees removal at end of life for wood recycling.

Growth opportunities

Funding Avenues: The new CAP, the Innovation Fund, and various other public funding programmes all provide opportunities for F&V farmers to have access to additional capital through the opportunity to integrate carbon sinks and renewable energy infrastructure (like windmills or solar panels) in agriculture-compatible ways to both increase revenue and reduce energy costs. The funding for these changes can be maximised through green finance initiatives to facilitate access to private capital on top of public support schemes...

New Tools and Techniques: Eco schemes, GAECs, and ongoing initiatives to introduce digitalisation and additional precision into farming, combined with the overall push for more sustainable and regenerative practices can all help improve soil health and increase biodiversity.

R&I Integration: Ensuring farmers' access and use of the latest research and collaborations with tech companies and academic institutions also enable the development of tailored agricultural technologies. AKIS and other state-sponsored programmes offer a possibility to facilitate the uptake of technologies and knowledge to support a carbon-neutral sector.

The EU carbon neutrality can only be reached thanks to the carbon sequestration of forest and fruit trees.



HARNESSING DIGITALISATION

Freshfel Europe's focus areas:	E-commerce	Traceability
e-Phyto	Artificial Intelligence (AI)	Precision Agriculture
		Internet of Things (IoT)

Fresh Perspectives

The move towards digitalization implies investment and adaptation to new business practices and technologies. This is not always easy for a sector still driven by small and medium-sized companies. Once mastered however, it might lead to better and more informed decisions and fresh perspectives.

Embracing digitalization for production and beyond: Using data-driven tools the sector enables itself to pursue more sustainable practices throughout the supply chain. At the farm level, examples range from crop monitoring and disease detection to making long-term predictions for optimizing future production. As products move through the supply chain, IoT and AI can assist in traceability, minimizing transit times, and ensuring products are distributed according to demand. This approach will decrease waste, improve efficiency, and enhance transparency towards consumers.

Member States. The convenience of online food sales can support the move towards more sustainable diets, with high quality fresh produce being delivered to your home.

Growth Opportunities

Dare to be innovative: The use of digital tools and techniques is still in the early stages in the agricultural sector, and more investment and research are still needed. Investing in innovative solutions and participating in trial studies should be encouraged. This is only possible if the possibilities outweigh the risks, and there must be guarantees for exploratory operators.

Transparency, but keep data ownership: Making the most of the digital tools at hand requires data. While this data must be shared, it is key that it is safe and that ownership of data is not passed. Further work on how to best utilise shared data safely must be paired with increased education of

operators in the fresh produce sector about data management. Data skills and literacy must be increased throughout the chain.

Use fewer resources – and tell the story: Digitalisation can help create a precise supply chain where everything from freight routes to fertiliser control can be optimised, reducing resource use and waste. This holds also with the end consumer who, through digital tools, can receive information on food preservation and preparation, and also engage with others to share recipes and nifty tricks to avoid food waste.

Trade Facilitation: The introduction of new digital tools, like e-Phyto and TRACES opens a window for more seamless trade and easier controls on imports that can ensure that fresh produce is delivered to consumers in a faster manner and more reliable process with reduced administrative burdens and delays by establishing common and interchangeable procedures and certificates that apply to 88 countries.

Welcome fresh fruits and vegetables to your doorstep: The ratio of online purchasing of food and groceries has increased in the last years, and online sales of food now account for 5-8 % of the market with differences of penetration by channels and by



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ENHANCING CONFIDENCE IN QUALITY & SAFETY

Freshfel Europe's focus areas:

Plant Protection Products (PPPs)

Contaminants Food Hygiene

Food Additives Biocidal Products

Fertilizers Sanitizers

Increased Official Controls

Research & Innovation (R&I)

Fresh perspectives

Securing consumer confidence in food safety is essential in the fresh produce sector. Monitoring existing and changing legislative requirements on multiple policy areas is the daily work of the Freshfel Europe Secretariat and its members.

Plant protection products: Extensive debate on the new Regulation on Sustainable Use of Plant Protection Products (SUR) resulted in the European Commission's President proposal to withdraw the SUR proposal and develop a new one based on lessons learned and by engaging stakeholders. While the fresh produce sector supports the overall sustainability objectives of the European Commission, the legislative initiatives should be developed keeping in mind FAO statement that plants make up to 80% of our daily calories and are responsible to 98% of the oxygen we breathe and help to climate change by reducing carbon from the atmosphere, hence all the relevance of securing safe and sound plant productivity.

Role of food additives: The current legislative framework does not allow to extend the use of food additives on



fresh produce if certain conditions are not met. The sector aims to demonstrate that food additives can contribute to the reduction of food waste and the usage of plastic packaging. Consumers dictate the sector's decisions and therefore mandatory labelling could be a solution to extend the use to a wider range of commodities.

Growth opportunities

Protection of plant health: To protect plant health it is needed to raise public awareness, commit human and financial resources in plant protection governmental organisations, incentivize investments in research and innovation, and outreach to innovative practices and technologies.

Policy coherence: Interconnected objectives set under different policy initiatives affect production and supply of fresh produce. If different policy areas are implemented unilaterally, they will result in a limitation of the tools to produce food in a safe and

sustainable manner. Policy makers must work together to look at issues arising from evolving consumers' expectations as well as climate change as the overall objective of the European Commission. An overarching legislative framework is needed that does not contradict and that would allow European producers to find safe effective tools for daily use or emergency situations.

Communication as part of the solution: Transparent and clear communication towards the public is an important instrument for encouraging dialogue about science-based production practices. National communication strategies should be developed to fill the knowledge gaps within consumer groups.

While the fresh produce sector supports the overall sustainability objectives of the European Commission, the legislative initiatives should be developed keeping in mind FAO statement that plants make up to 80% of our daily calories.



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ADJUSTING THE TOOLBOX TO SECURE PRODUCTIVITY

Freshfel Europe's focus areas:	New Breeding Techniques (NBTs)	Precision Agriculture
Research & Innovation (R&I)	Plant Protection Products (PPPs)	Biocontrol solutions

Fresh Perspectives

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 new breeding techniques (NBTs). Although not all policy initiatives had successful outcomes, sustainable production as well as sustainable toolbox remain key prerequisites for the sector:

Sustainable use of PPPs: The Commission's proposed draft regulation on sustainable use of plant protection products initially aimed to reduce the use of chemical and more hazardous PPPs, however, it has instead become a symbol of polarisation. Additionally, the withdrawal of SUR will delay innovative biocontrol substances coming on the market. There is an urgent need within the sector to set the legislative procedures for placing biocontrol products on the market to ensure these solutions are made available to growers without unnecessary delays. Climate change is bringing new pests and diseases while the availability of tools is shrinking. Substances are often removed without alternative solutions exposing growers to unsustainable growing practices, such as using multiple PPPs to cope with plant health, quality and safety issues. Meanwhile, national emergency authorization rules have become more restrictive, putting European growers at risk of not having solutions at the most vulnerable moments.

Precision agriculture: the crop management approach that focuses on observation and measurement is key to expanding the production toolbox and achieving sustainability goals. The sector continuously invests in value assets to reach low environmental impacts, such as IPM techniques, the use of biocontrol substances or responsible use of chemical active

substances, and improved management of fertilizer usage and other inputs.

New technologies: The Farm to Fork strategy 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.

Growth Opportunities

New Breeding Practices: The upcoming EU rules on NGTs will make the development and use of new varieties much easier, especially those with sustainability-enhancing traits, like better drought resistance or reduced water consumption. NGTs also offer the opportunity to develop and grow new plant varieties that offer new flavour palettes and that permit greater and healthier yields.

Research and Innovation: Research and innovation play a paramount role in providing growers with the right toolbox for growing safe and healthy fresh produce across the European Union. Through joint public and private partnerships, the sector can ensure that European growers have access to a diverse toolbox of innovative instruments to help them continue to further transition to sustainable and resilient agriculture. To ensure that, and in addition to non-regulatory technologies, faster procedures and more flexible policies are needed at the European and national levels to guarantee access to novelties, such as NBTs or a wider range of biocontrol plant protection.

Future-oriented regulatory framework: it is essential that the EU policymakers facilitate timely access to a complete agricultural toolbox, adequate financial support, and knowledge. Policy initiatives should be built to respond to existing challenges and oriented towards future necessities.



The Guide to a Healthy Generation



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.

Fresh Produce Centre
www.freshproducecentre.com

SECURING SUSTAINABLE LABOUR

Freshfel Europe's focus areas:

Generational renewal

Economic sustainability

Labour shortage

Seasonal workers Fair wages

Logistics resources

Corporate Sustainability

Due Diligence



Fresh perspectives

Human resources solutions are key in a sector that is heavily dependent on its people with skills and knowledge. The scarcity of human resources

An evergreen sector: Like many agricultural sectors, the fresh produce industry is seeing an ageing in producers, and a lack of young farmers to take over. Growing fresh produce is a profession for the future and brings benefits to the environment, public health, and rural areas. It is important that this is recognized on a wider scale, and that the many attractions of the profession are advertised. Reducing administrative hurdles, both real and perceived, and securing revenues for the production and its associated risks will increase interest in a broader diversity of prospective producers.

Transparency for human rights: The increased requests from both the society and regulators for further transparency on labour and human rights in

Growing fresh produce is a profession for the future and brings benefits to the environment, public health, and rural areas. It is important that this is recognized on a wider scale.

company value chains will put the spotlight on good working conditions and fair wages. Through Freshfel Europe's work on Corporate Sustainability Reporting Directive (CSRD) and Corporate Sustainability Due Diligence Directive (CSDDD), the fresh produce sector welcomes this increased transparency.

Growth opportunities

Pave the way for a new generation: By investing in education on food systems and through mentorship programs, the new generations can engage with the prospect of a career in horticulture already from earlier stages.

Reduce administrative burden: Many producers today face several administrative burdens, keeping them in an office rather than in their workplace for large parts of the week. Upcoming simplification of workload will be essential in the attractiveness for the younger generation of farmers both from a regulation and certification perspective, will increase the financial attractiveness of the business.

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ENVIRONMENTAL EFFICIENCY

Freshfel Europe's focus areas:	Energy	One health
Climate change	Water management	Soil health
	Biodiversity	Carbon emissions

Fresh Perspectives

In a time of scarcity of natural resources, fruit and vegetables appear to be well positioned in agriculture for a sound and efficient use of water, for minimising the impact of activities on the soil and biodiversity, and for maximizing the use of land linked to carbon sequestration and energy production while protecting orchards.

Mitigating sector: Fresh produce is a central food category of the One Health approach. In the fields and orchards, it provides a range of benefits to the grounds around them. Because fruits and vegetables are dependent on healthy soils and waters, the sector continuously works to minimize its impact on natural resources and ensure the longevity of the land. It has among the smallest water footprints of food products and contributes to biodiversity and carbon sequestration.

Dual-use capacities: The land where fruits and vegetables are grown can be used for much more and has the potential to contribute positively to reaching zero-emission targets and energy autonomy. Already, many orchards and fields are making use of innovative solutions such as agrivoltaics or combining orchards with pasture.

Growth Opportunities

Facilitate energy self-sufficiency: Fresh produce operators have great potential to become self-sufficient in renewable energy production which would help reduce dependencies and contribute to decarbonisation of the energy supply in Europe. Solar panels or windmills in partnership with growers are just among the emerging examples where a double benefit can be

found between production and energy. They not only create clean energy for the farm, but they can also be used to protect crops from sunburn, hail, heavy rains, and other weather events. The use of such opportunities must be encouraged and supported, meaning that energy grids must be adapted to avoid wasting excess energy, and the administrative burdens must remain practical.

Support investments in climate change mitigation and adaptation: Climate change is severely felt by the sector and is already having a noticeable effect on production levels. By investing in short-, medium-, and long-term solutions to mitigate and adapt to the unpredictability of climate change, access to fresh produce can be secured. While some areas are already making use of new irrigation systems, water collection and shading nets, there are still a large part of producers who are not able to do so.

The sector must be prioritised according to its inherent contribution to these targets, and the necessity of clearly communicating these to both consumers and lawmakers.

Acknowledge the role of fresh produce as a solution: The fresh produce sector plays a key role in the European and global strategies towards sustainable systems; the Green Deal, Farm to Fork, One Health, Sustainable Development Goals and more. The sector must be prioritised according to its inherent contribution to these targets, and the necessity of clearly communicating these to both consumers and lawmakers.



TRADING IN GLOBAL GEOPOLITICAL TURBULENCE

Freshfel Europe's focus areas:

Sustainable Trade

Free Trade Agreements (FTA)

WTO SPS and TBT agreements

Global v. local

Reciprocity

Embargoes

Geopolitics

EU enlargement

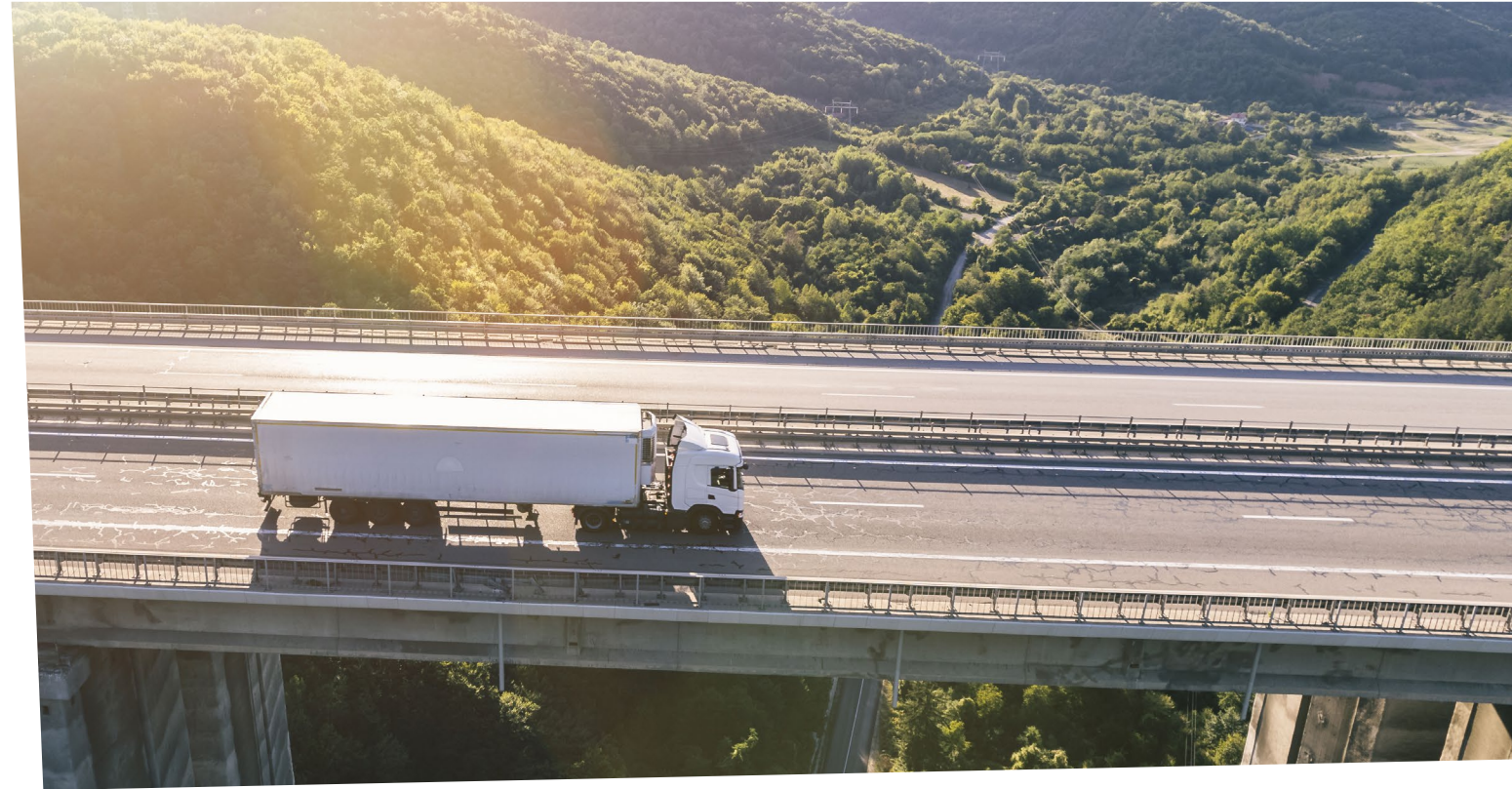
Fresh perspectives

For the last two decades, the EU has sought to expand its ties and remove trade barriers, at first multilaterally and recently in a more bilateral fashion. The EU's efforts to increase its trading relations with the world have resulted in various strategies to engage with third countries and a new approach to trade, including now as well elements of sustainability.

Sustainability in trade: Ever since 2022, the EU has sought to introduce trade and sustainable development (TSD) provisions in all its new FTAs, and into the revised ones like Mexico's and Chile's.

Coordination on SPS: FTAs should not be limited to removing tariffs but address the main SPS obstacles to trade. Opening new markets for EU exports by facilitating SPS protocols will remain a priority for Freshfel Europe's work. Collaboration between Freshfel Europe, its members, the European Commission, and national authorities will contribute to removing obstacles through a joint approach, securing the same solutions for the same concerns, and joining forces for inspections.

Enlargement: The revitalised impulse for an eastward enlargement will



change the dynamics of intra-EU trade and open opportunities for new trade relationships with candidate countries while containing the impact of different and divergent competitive models through the CAP and trade flows.

Growth opportunities

FTA and WTO enforcement: Collaboration is key to addressing excessive SPS barriers and lack of reciprocity for EU fresh produce exports to third countries and staying in line with the principles of FTA or WTO rules with proper enforcement.

Repositioning trade in the new business environment: Geostrategic shifts might require repositioning trade towards like-minded countries (e.g. friend-shoring). Efforts to remove barriers to export should focus on main populated markets such as FTA countries (Japan, Columbia, Mexico) or other countries such as the USA, India, Chi-

na, and Brazil as well as the neighbourhood, and particularly the UK, building on the secure and safe trade relations developed in the last 40 years.

Green Deal and international trade: The Green Deal might impact the competitive position of EU produce on the global market while making more complex access to the EU market for third countries and in particular developing countries. While driving a much-needed process to cope with the Paris Climate Agreement, the EU cannot disconnect itself from the rest of the world to secure trade flow in both directions and handle the mirror clause with wisdom.

Collaboration between Freshfel Europe, its members, the European Commission, and national authorities will contribute to removing obstacles through a joint approach.

Fresh perspectives

Efficient and sustainable logistics models are key for fresh produce. This includes around 40 million t distributed locally within a short supply chain but also around 30 million t moved yearly with the EU Single Market. Finally, to secure the safe arrival of 7.5 million t exported to 140 destinations around the world and for the 15 million t imported in the EU, transport models need to be reassessed regarding their carbon footprint. The transport sector represents almost a quarter of all EU greenhouse emissions. It will change how fresh produce is transported within the EU and internationally.

Local logistics: Local distribution channels need to be improved within an efficient logistics network to smaller retail shops supplied directly from producers or the wholesale market. Logistics for delivery to consumers of purchases resulting from growing online sales should be properly put in place most efficiently.

Green transport with the Single Market: The EU's policy impulse regarding sustainable transport will lead to new investments for truck fleets (electric shift) but also lead to exploring new opportunities for a modal shift away from lorry-based transportation towards new options offered by rail freight.

Sustainable toolbox: Maintain quality from orchards to consumers is not only the result of mastering temperature control throughout the chain but will also require research and innovation within the sector to introduce alternative solutions to cope with the new unjustified and discriminatory restrictions on packaging and further limitation of post-harvest treatments and coatings.

Growth opportunities

Logistics under turbulence: Delays in port discharge or traffic restrictions in the Gulf of Aden (due to geopolitical conflicts) and in the Panama Canal (due to climatic events) have impacted global fresh produce flows away from their normal routes. This has led to higher

MOVING TOWARDS GREENER LOGISTICS

Freshfel Europe's focus areas:

Global chokepoints

Modal shift

Sustainable logistics

Green Corridors

New taxation

costs and longer journeys. However, these difficulties also open a window to a general rerouting of trade, for instance from Egypt and other MENA countries towards the EU instead of Asia due to blocked routes in the Red Sea.

Modern logistics: The development of newer infrastructures opens the way to restructure the trading dynamics for the sector, opening new possible avenues for trade and improving the outreach of producers to new consumers with quality products handled with care and in a sustainable manner across the supply chain.

Sustainable logistics: To cope with CO2 emission, lower steam might increase transport time on long distances, already impacted by the lack of direct line to key destinations. Temperature control and new technology should secure and maintain quality and safety to final destinations around the world for the satisfaction of customers.

Transport needs to be reinvented on all stages; locally, intra-EU and internationally. Moving goods in a greener fashion and adapting to geopolitical and climatic constraints are key parameters to secure the freshness and quality of produce delivered to consumers.

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REWARDING FRESH PRODUCE ASSETS

Freshfel Europe's focus areas:	Promotion	Health
Inflation	(Un)healthy diets	Comparative Opportunities
		Image

Fresh Perspectives

The fresh produce sector was negatively impacted by the inflationary spiral due to the rising costs that hiked production input costs and logistics. Inflation also significantly impacted the purchasing power of consumers. Media reports too often associated fruit and vegetables with inflation impacting the prices of the consumer's food basket. However, fresh fruit and vegetables remain one of - if not the most - affordable food categories, while having the lowest environmental impact and the highest health benefits.

Sustainable diets: Fruit and vegetables should be regarded as essential goods, and part of the solutions to societal concerns reflected in the Green Deal, the Farm to Fork, and Europe's Beating Cancer Plan. It showcases the importance of fostering a healthy, sustainable and balanced diet of at least the minimum WHO goal of 400 grams per day.

In line with consumer expectations: Many consumers today are getting more conscious about how the food choices they make affect their environment and their own health. Fruits and vegetables tick both these boxes, while in fact remaining affordable.

A good investment for society: It is acknowledged on both a European and global level that fresh produce is a key part of sustainable diets. This includes also the part of economic sustainability. Encouraging and ensuring healthy diets increases healthy living years for the population, increases productivity and reduces expenditure on health care and social support.

Growth Opportunities

Economic incentive: Fruit and vegetables are one of the sectors with the lowest share of the CAP budget: 3% of

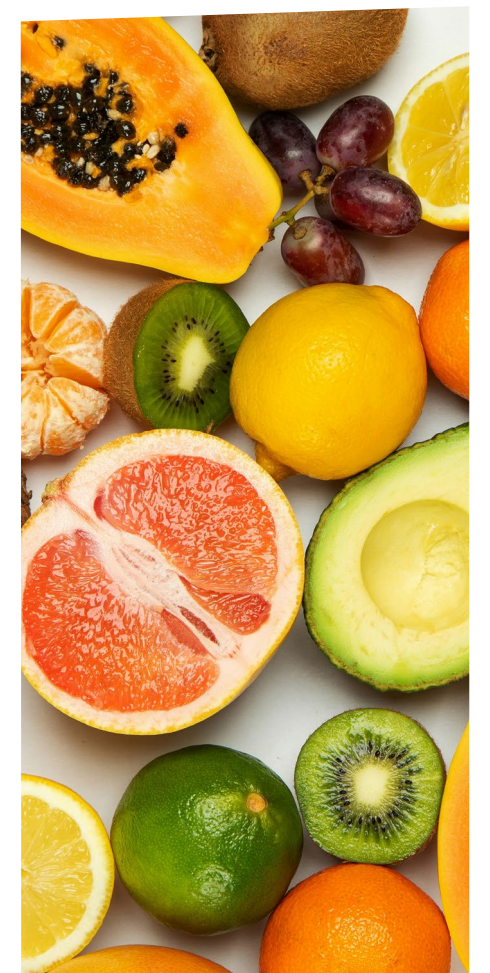
support despite contributing to about 20% of agriculture output value. Economic support to stimulate a healthy diet and fresh fruit and vegetable consumption should be maintained or even increased in the European Union.

Nutrition and health claims: Although ultimately sidelined in this European legislature, the Commission should focus on the necessary simplification of the procedure to secure nutritional and health claims. More flexibility and tools should be granted to the sector to inform consumers of the benefits of fresh produce.

Innovative tools needed: To be coherent and consistent with the Green Deal ambitions, further efforts at the EU level should be made to set a food assistance scheme (vouchers) for the most deprived population. Other incentives could be given towards a greener and more sustainable approach for public procurement and at the national level in taxation policy.

A shift in communication strategy: The current policy focuses on regulating ingredients that might be damaging health (e.g. fat, sugar, salt). Policymakers and public authorities should also take steps and be more vocal to highlight what should be eaten instead. It is time for "positive discrimination" for fresh produce, one of the only food categories that can be eaten without moderation.

Sustainable consumption: As inflation is being contained, it might assist in balancing production costs in line with a fair price paid by consumers reinforcing the position of fresh produce with the three pillars of sustainability: social, environmental, and economic.



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THE INTRICACIES OF PACKAGING

Freshfel Europe's focus areas:

PPWR SUPD Single Market

Food Waste Health

Environmental sustainability

Fresh perspectives

Packaging in general, and the revision of the Packaging and Packaging Waste Directive (PPWR) in particular, has been a central topic in 2023 and 2024. The reform generated heavy debate and was a concrete example of discrimination towards a particular food category, namely fruits and vegetables. Freshfel Europe has continuously demonstrated the commitment of the sector to the most sustainable solutions considering food quality, food safety, reduction of food waste and the need to stimulate consumption with the appropriate convenience and marketing.

Balancing sustainable solutions:

The fresh produce sector has always worked towards solutions that provide high-quality produce with the least environmental impact. This has led to about 50% of all fresh fruits and vegetables in the EU being sold loose, and the sector accounts only for 1,5% of all plastic food packaging. Through a scientifically based transition, the sector has managed to minimise unnecessary packaging without putting health, quality, trade or environmental impact at risk.

Approximately 2,3 million tons of fresh produce travel across intra-EU borders every month, showing the strength of the internal market of fresh fruits and vegetables between Member States.

resources is harmonisation and coherency. Freshfel Europe has actively engaged with the national implementations of the Single-Use Plastics Directive (SUPD) to ensure that there are as few discrepancies as possible and allow fresh produce to move unhindered to consumers in Europe without perishing. The hope of fully harmonising the Single Market was shut down in the latest version of the PPWR, but Freshfel Europe remains proactive in finding the next best solution.

Equal the playing field: Approximately 2,3 million tons of fresh produce travel across intra-EU borders every month, showing the strength of the internal market of fresh fruits and vegetables between Member States. The current allowing of diverging restrictions on products that may be packed, unsynchronised time frames, and different packaging material allowances cause an uneven playing field for operators in the Member States.

Growth opportunities

Harmonising the EU market: A key element in reducing waste of food and

Take advantage of sector expertise: The fresh produce sector is already advanced in research on how to best



preserve quality while minimising the use of packaging. Combining scientific findings with operational expertise ensures sound and feasible outcomes.

Laying the foundation for long-term solutions:

To not discourage long-term investments in innovative sustainable solutions, transition periods must be without discrimination, soft, and predictable. We have recently found ourselves in a period of uncertainties with Member States legislations pre-empting the planned PPWR and with the PPWR itself being subject to the widest possible range of suggestions. Going forward, it is essential that the sector can invest and progress in long-term stable solutions that will bring the most benefit in the long run.

Open the door for alternative solutions:

Research and innovation will open many doors for alternative packaging solutions. These alternatives must be embraced and encouraged. Fruits and vegetables are perishable products, and simply removing their protection will increase damage to the food supply, public health, and the environment. Promising and safe alternatives such as coatings must be further supported and not smothered before development.

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REINFORCING F&V VALUES IN

EUROPEAN AGENDA POLICIES

Freshfel Europe's focus areas:	Promotion	Labelling
Nutritional claims	Health	Consumption
Science-based	NGOs	Media

Fresh Perspectives

Fresh produce has a deficit of communication and budget. Media and single- topic NGOs publish negative and often misleading stories, impacting the reputation of generic fresh products or specific brands. The affordability of fresh produce has also been inaccurately reported on during times of high inflation. Even in policy reports, such as the EU Food Fraud report, misleading depictions create false perceptions of the fresh produce sector which contradict other EU agency findings.

More communication is needed: the sector should more proactively report about its assets, achievements, and comparative advantage in the food assortment. Increasing the reputation of the sector and its products is a necessity and will require the support of public authorities.

Nutritional and health claims: EU rules make it rather unpractical for the sector to use the scheme of nutritional or health claims. This creates an unlevelled playing field with branded agrifood products competing with fresh produce. Having a standard composition of the ingredients of their products, completing a dossier is much easier and would be for the benefit of their own brands.

Natural medicine: a public-private partnership is needed to better value the public role of fruit and vegetables as natural medicine. Raising further the awareness of consumers of the health benefits and preventive role of fruit and vegetables against non-communicable diseases could have a significant return on investment by reducing the cost of unhealthy eating.

Growth Opportunities

Promotion policy: the budget for promotion should be kept or increased. It remains an essential vehicle of communication and information about the value of fresh produce.

Support of the scientific community: fruit and vegetables contribute to global health. The fresh produce sector counts on the benefit of for instance the EGEA network. The scientific findings of researchers show evidence of the positive impact of consuming more fruits and vegetables and their low environmental impact, making them part of the solution to climate change and global warming.

Communicating with the youngest: the EU school scheme is an important instrument to educate children about the value and diversity of fruit and vegetables and learn more about sustainable production practices.

The sector should more proactively report about its assets, achievements, and comparative advantage in the food assortment.





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BUILDING A NUTRITIOUS FUTURE

Freshfel Europe's focus areas:

Promotion policy

Plant based diet

Nutritional guidelines

Consumption Monitor

Fresh perspectives

Every year, Freshfel Europe publishes a Consumption Monitor, analysing the average daily consumption of fresh fruits and vegetables in all Member States. The latest report shows a decline in consumption, with levels being among the lowest of the last five years and well below the minimum recommendation of the World Health Organization. One-third of European consumers do not even eat one portion of fruit or vegetables per day.

Change is a public health duty: authorities should engage more proactively to reverse the declining consumption patterns and help convert awareness of produce benefits into an increase in consumption. It will be a triple win for the planet, the health of citizens, and the sector.

800 g is the new ambition: despite stagnating below 400 g, national nutritional guidelines are indicating that consumption should be well above as validated by the Nordic Council with a simple equation: we need 400 g for a health benefit and another 400 g from an environmental perspective. Consequently, the new target should be 800 g/capita /day.

Growth opportunities

Growing demand: Every added portion eaten daily by European consumers leads to an increased demand of around 12,5 million t. Looking at the data, several additional portions per

person would be needed to match the nutritional guidelines.

Plant diet: the call for a shift towards a plant-based diet will not be discontinued. The need for change resulting from the Green Deal should not lose intensity. Positive discrimination is needed to win stomach share over (ultra-) processed products.



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MARCH 2022 - FEBRUARY 2025

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TIPS FOR GOOD POLICY MAKING & GOVERNANCE

Freshfel Europe's focus areas:	Soft transition	Positive discrimination
	Long term visibility	Single Market

Fresh Perspectives

2024 will see the start of a new legislative term. The last 5 years were disrupted by a pandemic and a war in the immediate EU neighbourhood, as well as growing geopolitical instability. In times of uncertainties and economic turmoil, consumers tend to forget the basics of a healthy diet. The last legislative term was marked by a lack of governance leadership leading too often to incoherent and contradictory policy development and the introduction of new rules without any soft transition or alternatives in place. The resurgence of national perspectives and growing provisions based on the principles of subsidiarity are also endangering the good functioning of the Single Market. The upcoming term will have to consider some fresh perspectives:

Opt for practical – not ideological: Complex rules are not properly implemented. In the EU consultation process, the voice of business is

too often lost, and the input from the operational reality is neglected. The sector thoroughly believes that policy influence should be constructive, and subject to accountability.

Sovereignty and self-sufficient priority should not result in nationalism or in protectionism. While staying ambitious to the solutions to climate change, the EU should avoid regulatory asymmetry between the EU and the rest of the world.

Growth Opportunities

The Single Market needs to be protected: It is a safe bank that needs to be protected and operate on the principle of "one market, one rule". More EU-wide initiatives should be considered (e.g. regarding health, PPP authorisations, and packaging) to avoid added costs, prevent distortion of competition, and enhance fair trade within the Single Market.

Resilience has a limit: The sector demonstrated its resilience to the 'polycrisis', but rising costs and the pace of crisis are changing the capacity of investing in conflictive and incoherent policies. Without simplification and decreased administrative burden, smaller growers might be pushed out of the market. It will jeopardize regeneration and food supply. More rules, namely in the complex sustainability dossier, should not lead to more certifications, and consequently more administrative burdens and costs. Instead, the fresh produce sector should be made an attractive choice.



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