



Freshfel Europe stands as the leading voice of the fresh fruit and vegetable sector in Europe, serving the interests of the supply chain while promoting healthier, more sustainable consumption. As the lead representative body of the sector EU-wide, it has played an essential role in the last 25 years shaping EU policy, enhancing production, trade and retailing towards sustainable food systems, as well as strengthening the competitiveness of the European sector with a view to stimulating consumption.

Looking ahead, the business environment will be shaped by a rapidly evolving and increasingly complex landscape driven by:

- Policy uncertainty and fragmentation: CAP reform, MFF budget cuts and funding compliance pressure, evolving sustainability agenda post Green Deal/Farm to Fork, food and plant safety policy and nutrition and health agendas.
- Climate pressure reality: more frequent extreme events, water stress or excess, pest/disease pressures, limited availability of effective production tools and innovation pathways.
- Economic headwinds: inflationary pressures, consumer purchasing power constraints, labour shortages, input costs, inefficiency of market fragmentation.
- Geopolitics and trade volatility undermining predictability: disruption risks in logistic routes, energy, inputs, tariff and trade sanctions, unsolved market access and growing protectionism within a challenged multilateral legal order.
- Enlargement preparation: increased competitive and regulatory complexity; need for alignment and sector cohesion.

Despite its strong and widely recognised environmental and health benefits, fresh fruit and vegetables, more than any other food, still struggle to project their strong assets in a compelling narrative towards decision makers and consumers. Fresh fruit and vegetables are a cornerstone of the solution to many of today's societal challenges. Fresh produce power should be better recognised as a public good whose consumption must be actively promoted.

Today, consumption levels remain well below the minimum recommendations set by nutritional and environmental guidelines. Joining forces to close this gap is both an urgent public health priority and a strategic policy opportunity.

Freshfel Europe's advocacy should remain firmly business-oriented and operationally driven, but the sector's political voice must be strengthened to reinforce the sector's competitiveness and secure a greater recognition of the fresh produce's value in EU policymaking.

On this background, Freshfel Europe outlines in a "Manifesto" its priority areas and a strategic and structured approach to address them. It aims at guiding the association for the coming 5 years to best defend the interests and societal role of the fresh produce sector.

The Manifesto should be shaped by a Freshfel Europe Vision and Mission standing as follows:

**VISION:** We want to advance fruit and vegetables as essential solutions for healthy diets, sustainable food systems, and resilient markets.

**MISSION:** We advocate and deliver solutions for a competitive and sustainable fresh fruit and vegetable system. We aim to provide food that meets consumers' expectations while contributing to a greener planet, healthier diets, a better society, and a stronger economy.



### Freshfel Europe as the leader of a “fresh first” approach

- **Priority:** The powerful, essential, and undisputed role of fruit and vegetables should be better valued and recognised. They should be positioned as a key instrument to address societal concerns (health and environmental). Positive discrimination should guide policies such as public health, nutrition, education, sustainable food systems, and the climate strategy. Freshfel Europe should raise policymakers’ and consumers’ awareness of the multiple assets of fresh produce.
- **Approach:** Promote a “fresh first” strategy that integrates fresh fruit and vegetables into dietary and sustainability policies, highlighting evidence-based environmental and health benefits. These include, among others, low carbon footprint, low use of natural resources (such as water), efficient use of land, high nutritional value and diversity, and absence of addictive consumption risks. Freshfel Europe should develop targeted storytelling for policymakers, stakeholders, and consumers to communicate the sector’s positive societal impact and demystify several mistaken perceptions.

### Freshfel Europe as the consumption booster in line with nutritional & environmental guidelines

- **Priority:** Increasing fruit and vegetable consumption as a key element of a Mediterranean diet to meet nutritional and environmental recommendations (>400 g/day) is the most unifying and undisputed objective of Freshfel Europe. Today, some recommendations go as high as 800 g/day, with 400 g/day for health and 400g/day for the planet. Each additional portion per day of EU citizens would generate a demand of close to 15 million T.
- **Approach:** Advocate demand-side policies beyond current frameworks, such as the EU School scheme or EU promotion funds. Capture the momentum of the revision of the Common Agricultural Policy and green public procurement rules to stimulate consumption, while exploring fiscal incentives to recognise fruit & vegetables’ unique role in improving health and sustainability outcomes (VAT-rates, F&V vouchers). Through its consumption monitor initiative and other actions, Freshfel Europe should continue monitoring the impact of consumers’ behaviours, changing lifestyles, evolution of food services and ready-to-eat meals at retail level. Communicate better the fresh produce assets and benefits to influence long-term consumer habits and reposition pure and natural fruit and vegetables at the centre of a healthy diet as opposed to ultra-processed food.

### Freshfel Europe as the guardian of the sector competitiveness

- **Priority:** Competitiveness and food security start with a well-equipped toolbox for producers to ensure efficient yields and quality products. Risks and challenges of different natures are proliferating, endangering production efficiency and quality as well as financial return. Climate change, the spread of new pests and diseases, or unprotected crops are some of the factors leading to more food loss and food waste, impacting the value of produce. Additionally, labour shortage, rise in costs and competition of ultra-processed foods further threaten the sector’s competitiveness and its appeal to the next generation of producers.
- **Approach:** The good functioning of the single market is based on the “one market, one rule” principle. Enabling consistent and cost-effective application of common rules across the EU is the key to competitiveness. For production, a science-based and equal access to plant protection products, while broadening the toolbox with biocontrol methods, is essential. Enhancing sustainable agriculture practices (precision farming, regenerative agriculture, organic), maintaining strong research and innovation, and access to new technologies (e.g. new genomic techniques) should also be prioritised to keep a strong European leadership. Addressing other matters such as over-certification, regulatory bottlenecks, integrated packaging solutions, reducing food loss and waste, fostering water and soil management, common footprint methodologies, and solving labour issues are other pathways to boost the sector’s competitiveness.



### Freshfel Europe as the strategic navigator within unpredictable business landscapes

- **Priority:** Rising volatility across the legal, political, and geopolitical landscapes generates operational unpredictability and complexity. Market conditions are further aggravated by uncertain yields and productivity impacted by climate change. Fluctuating regulations and unclear regulatory simplification process, trade disruptions, and environmental pressures are limiting operators' long-term visibility for investment, logistics planning and business relations. To overcome these risks, the sector must be empowered with tools to operate efficiently and respond quickly.
- **Approach:** Strengthening the monitoring of EU, national, and international regulatory developments will best guide Freshfel Europe members in navigating such an unpredictable business environment. Enhancing coordination among members for fast and well-argued positions on emerging issues will provide insights into risk evaluation, operational planning, and business opportunities. Freshfel Europe should reinforce the sector's voice in all relevant EU platforms and consultation, as well as raise the sector's profile to the upper EU political level. Partnerships with like-minded European associations may be pursued on general topics, while maintaining leadership on fresh produce-specific matters.

### Freshfel Europe as an advocate of open trade and fair market access

- **Priority:** Protect and expand market access in the face of rising protectionism, geopolitical uncertainty, and evolving trade regulations, safeguarding intra-EU and international trade flows for market stability.
- **Approach:** Monitor trade agreements, SPS measures, border control procedures, and enforcement practices. Advocate for harmonised standards, reciprocity principles, and predictable regulatory frameworks. Position fruit and vegetables as a strategic priority in trade negotiations rather than a bargaining commodity. It should cover trade at all levels with its own specificities for intra-EU trade, imports and exports.

### Freshfel Europe as the provider of market intelligence

- **Priority:** Provide reliable, evidence-based insights for well-sustained advocacy, informed operational decisions, and strategic planning for improved production, trade or retailing decisions.
- **Approach:** Expand monitoring of production trends, trade flows, and consumption patterns. Integrate data and analytics in position papers to validate their rationale. Share structured reports with members to anticipate changes, identify opportunities, and support risk management.

### Freshfel Europe as the facilitator for collective projects

- **Priority:** Enable collaboration to deliver shared, scalable solutions across the sector.
- **Approach:** Promote joint initiatives in promotion, market access, sustainability reporting, logistics efficiency, food and plant safety, and R&I. Coordinate resources to standardise approaches and mutualize efforts and scale solutions for maximum sector-wide impact.

### Freshfel Europe as the unified voice of the European fresh produce sector

- **Priority:** Strengthen the sector's coherence and representation by further reinforcing Freshfel Europe as the lead, authoritative and representative voice for fresh produce across Europe. This includes coordinating positions across production, trade, logistics and retail, and ensuring the sector speaks with unity on EU policy and other sectoral issues at all layers of influence (EU, nationally, or internationally).
- **Approach:** Freshfel Europe, leveraging its operational expertise, should gather insights across the supply chain. Increased consultations with members will ensure better alignment of advocacy messages of the sector. Strong and well-reasoned positions will enhance the sector's credibility with EU institutions, policymakers, and other stakeholders. Providing members with clear guidance and advocacy messaging will strengthen the sector, reinforce the unified sector's perspective, and ultimately strengthen its influence.

