

Freshfel Europe

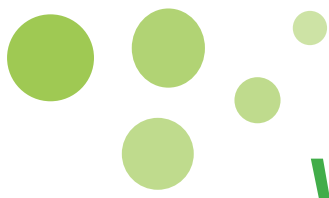
Activity Report

2020



freshfel

EUROPEAN FRESH PRODUCE ASSOCIATION



Welcome

Introduction

This Activity Report provides a general overview about **Freshfel Europe**, its organisation and structure as well as topics that are pertinent to Freshfel Europe's members.

Freshfel Europe's Activity Report is published on an annual basis in advance of Freshfel Europe's Annual Event. This edition covers Freshfel Europe's main activities between June 2019 and May 2020.

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

Not a Freshfel Europe member yet?

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

For more information on how to become a Freshfel Europe member go to:

www.freshfel.org/member/about-membership

Freshfel Europe would like to thank its members and associated members for their continued support.



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Behind a great company,
there are always
great people.



At Anecoop, we are producers and we market our own products.

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

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

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

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

Foreword

This Activity Report, covering the period June 2019 to August 2020, provides you with an overview of those areas that have shaped Freshfel Europe's activities over the past 12 months.

This Report covers a period of unprecedented uncertainties: new policy initiatives such as the European Green Deal and the Farm to Fork Strategy, huge business uncertainties due to the never-ending Brexit discussions and insecurities for health and businesses following the outbreak of the COVID-19 pandemic.

During this time and more than ever, it was important for the sector to rely on a strong, diverse, member-driven association. For all these complex developments, the Association was an asset to best defend the interests of the sector taking into account its diversity of concerns through Freshfel Europe's membership, which represents all segments of the fresh produce business, from production spreading right to all corners of Europe, to trading partners in wholesale, export and import, and to the retail segment.

During these 12 months, I have steered the Association with an approach to act collectively and speak from one voice, seeking solutions and positions that work for all. My task as President was facilitated by the capacity of the Freshfel Europe Board members and by the active support of all the members eager to work together on all the matters that came on the table of the Association. These topics are reviewed in this report. The professional and operational approach and positions adopted by the Association contributed to strongly voice the interest and needs of the sector and reinforce the position of the fruit and vegetable category in the agri-food environment. I invite all the members to continue to support the work of the Association and of the Freshfel Europe Secretariat in the coming months.

Looking at the agenda of the coming months, activities will still be influenced by the COVID-19-related uncertainties, the outcome of Brexit at the end of the year, the elaboration of the new business environment resulting from the European Green Deal and Farm to Fork Strategy. In addition, uncertainties about consumption trends in the EU due to the economic crisis and as well as the instability on international markets due to the on-going COVID-19 pandemic will need to be looked at and how to best position the sector and its products in this changing environment.

So, much remains to be done. In this unsettled time, I am seeking a second mandate as President of Freshfel Europe. I am confident that with the Board and the support of all the Freshfel Europe members we will elaborate the best solutions for the benefit of the whole fresh fruit and vegetable supply chain. With new focus on healthy diet, and the UN/WHO/FAO 2021 International Year of fruit and vegetables, I am confident that it will be providing new opportunities for our sector to raise the consumption.



Stephan Weist
Freshfel Europe President



BELORTA

redefining fruit & vegetables

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

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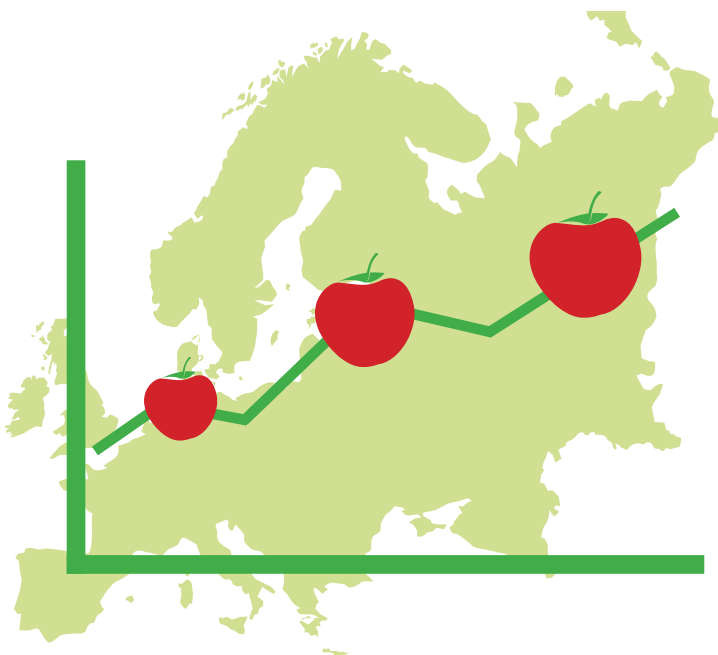
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About Freshfel Europe

Who we are

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

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



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

What we do

Freshfel Europe is in continual contact with its members and the European institutions, ensuring that the European fresh fruit and vegetable sector and its interests are well-represented and have a strong voice in Europe and globally. Freshfel Europe ensures the European fresh fruit and vegetable sector is dynamic, supplying healthy products using the highest quality, safety, environmental and social standards to meet consumers' changing needs.

Our mission

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

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

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The Freshfel Europe team

Freshfel Europe Board Members

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

All Freshfel Europe's members partake in specific Divisions and Committees, which cover specific segments of the supply chain as well as pertinent horizontal focus areas for the Association's work.

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

Freshfel Europe Secretariat

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



Philippe Binard
General Delegate



Eglè Baecke
Director Food Quality



Nelli Hajdu
Director Trade Policy & Business Development



Nicola Pisano
Policy Advisor Sustainability, Health & Promotion, & Communications Manager



Natalia Santos-Garcia Bernabe
Policy Advisor International Trade



Gil Kaufman
Project & Data Management Assistant



Linda Bloomfield
International Membership & Marketing Support



HOOGSTRATEN

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"Together shaping a sustainable future in fresh fruit and vegetables through craftsmanship and high-quality services"

Home of **Quality**

Growing only top-quality products, Hoogstraten has become a marked presence in Belgium and abroad. Over the years our growers developed a specific know-how in growing fruit and vegetables. Hoogstraten products are famous for their excellent taste and superior quality. Our strawberries are the pick of the crop but over the years the cooperative has also built a reputation in greenhouse vegetables and berries. Curious to find out more? Please contact sales@hoogstraten.eu

Coöperatie Hoogstraten cv - info@hoogstraten.eu - www.hoogstraten.eu



Business begins in Brussels

Freshfel Europe is involved in European level decision making in all policy areas relevant to the European fresh fruit and vegetable sector.

Located in Brussels, Belgium the Freshfel Europe Secretariat is situated at the heart of European policy making to ensure that the interests of the fresh produce sector are well represented.

Freshfel Europe members are actively involved in Freshfel Europe's activities in the **EU policy arena** with the European institutions and other EU-level bodies, such as UNECE, WHO, FAO, OECD and WTO. In doing so, **Freshfel Europe members assist the Secretariat in advocacy work on behalf of the general interest of the whole sector.**

Freshfel Europe regularly participates in European Commission Civil Dialogue Groups (CDGs) and adhoc Expert or Stakeholder Groups organised by DG AGRI. Both the Freshfel Europe Secretariat and Freshfel Europe member representatives attend these policy meetings, including:

- CDG on Horticulture, Olives & Spirits: Fruit & Vegetables
- CDG on Organic Farming
- CDG on CAP
- CDG on International Aspects of Agriculture
- CDG on Quality & Promotion
- CDG on EU School Fruit, Vegetables & Milk Scheme
- Group of Experts for apples and pears, citrus, peaches and nectarines, and tomatoes
- Market Observatory for Fruit and Vegetables

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

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

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

- Advisory Committee on the Food Chain and Animal and Plant Health
- EU Health Policy Platform
- EU Platform on Food Losses and Food Waste
- EU Action for Action on Diet, Physical Activity and Health.





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Market and business developments

Intra-EU trade - 5-year trend

In 2019 intra-trade amounted to 32.9 mio T worth €35.7 billion. The largest suppliers were Spain (12.1 mio T), the Netherlands (8.1 mio T), and Italy (2.8 mio T). The biggest recipients were Germany (8.9 mio T), France (4.2 mio T - partially for reshipment) and the United Kingdom (3.2 mio T). Intra-EU trade is a stable pillar of economic development in the EU fruit and vegetable sector with total EU production at 72.3 mio T (2018). An 'eat local' movement is being marked by 34.6 mio T of 72.3 mio T of production being consumed in the Member States of production and 32,9 mio T traded within the EU single market.

Intra-EU trade - 5 year trend



EU exports to worldwide markets - 5-year trend

2019 marked a new 5-year record in market value with a slight relaxation in EU exported volumes of fruit and vegetables with 4.8 mio T of EU fruit and vegetables exported worth €4.7 billion. Export volumes have been increasing 2018-2019 by 10% from 4.3 mio T up to 4.8 mio T hopefully moving towards a progressive recovery after the 2014 Russian embargo. This has amounted to an average 5-year growth since 2015 of -5% in volume by +6% in value. Export value have been developing steadily and have increased by 11% in 2018-2019 from €4.2 billion to €4.7 billion.

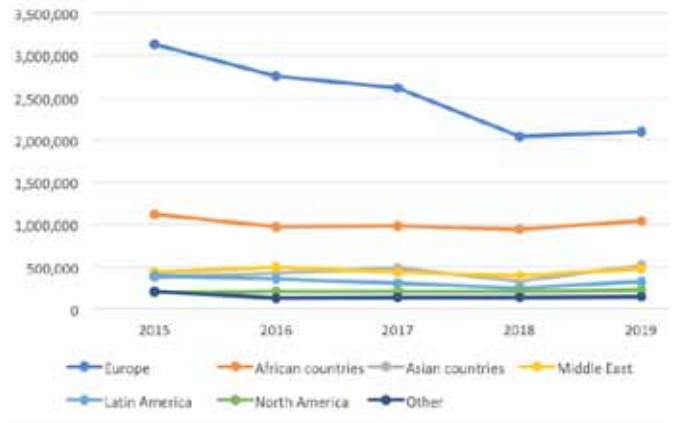
EU F&V exports - 5 year trend



Market closures and seasonal developments have impeded exports to the key European destinations across the European neighbourhood resulting in 33%

of market losses in the past 5 years. In 2019 there was a slight relaxation, driven by destinations on the African continent and in the Middle East. There has been a stabilization of all key export regions with limited growth outlook.

Global Destination Trends - Volume in T



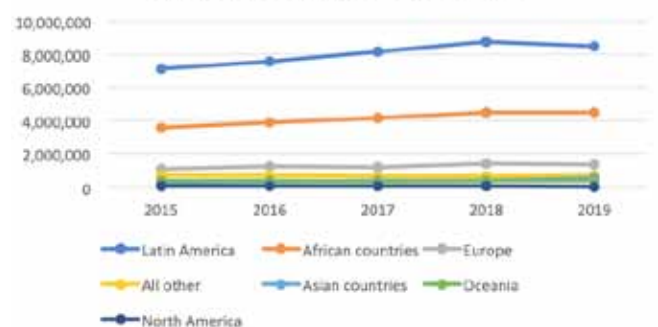
EU Imports from global destinations worldwide - 5-year trend maturity of the market?

Imports into the EU have been growing by an average of 5% per year in volume and 6% in value. However in 2018-2019, no growth in volume and +3% in value were recorded. There has been a slight drop of imports from Latin American countries, but overall stable import volumes to the EU. Key imported good in 2019 were bananas (5.9 mio T), pineapple (1 mio T) oranges (1 mio T) and tomatoes (650,000 T).

EU F&V imports - 5 year trend



Origin import trends - Volume in T





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2021

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Supporting the sector's resilience throughout COVID-19

The COVID-19 pandemic has deeply impacted the European fresh fruit and vegetables sector whose role has been particularly relevant amid this crisis to guarantee the supply of safe, healthy food to all citizens, which has been identified as an essential good and hence a key priority for regulators in Europe and beyond.

In response, Freshfel Europe formed an internal Coronavirus Response Team in March 2020 in close coordination with members to ensure the continuation of the supply of healthy, high quality fresh fruit and vegetables to consumers in the EU and beyond.

Freshfel Europe's crisis management strategy has been focused on key challenges affecting the chain, notably:

- Ensuring the availability of seasonal and other workers to guarantee production and availability of fresh produce for consumers
- Maintaining intra-EU movements and international trade of fresh produce despite the introduction of additional border checks and other restrictive measures affecting logistics and slowing down operations across the chain
- Securing regulatory adjustments with flexibility in CAP tools and granting whenever possible national or European financial assistance

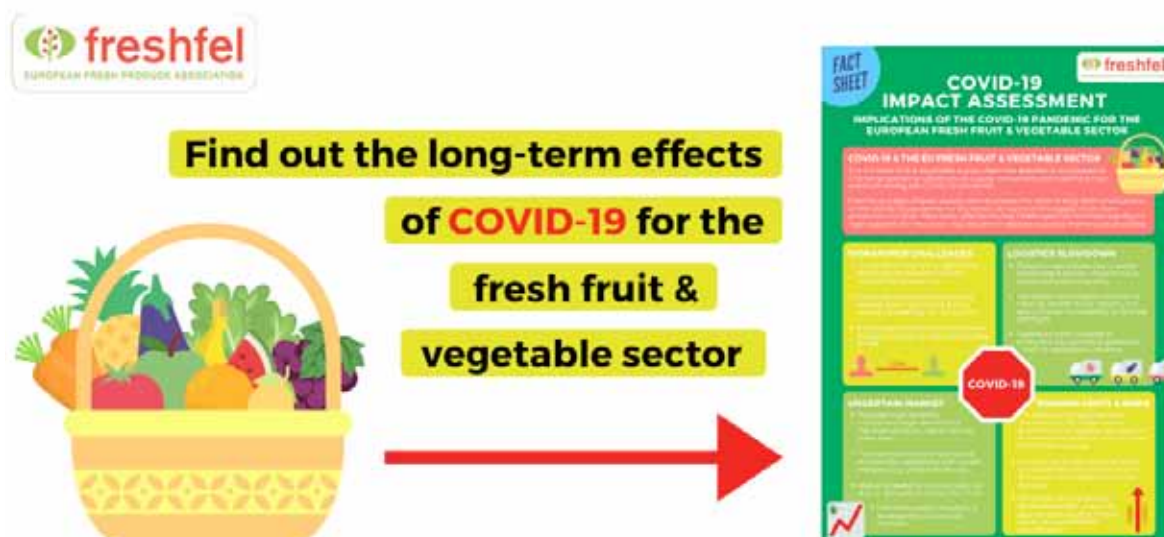
To address these and other challenges, Freshfel Europe's Coronavirus Action Plan has been based on three main channels of action:

- 1. INTELLIGENCE GATHERING AND EXCHANGE:** Freshfel Europe has provided its members with timely information and analysis about the impacts of the pandemic on the sector and policy responses.

Freshfel Europe released an 88-page COVID-19 Impact Assessment for the European fresh fruit and vegetable sector, a comprehensive study outlining the implications of the pandemic for the sector, including recommendations for policy-makers.

- 2. CLOSE ENGAGEMENT WITH REGULATORS:** Freshfel Europe has closely engaged with EU and international institutions to communicate key issues arising for the sector. This cooperation has served to assist authorities to find solutions, such as the creation of 'EU green lanes' to secure the continuation of intra-EU trade, the adoption of exceptional measures at EU level to accept the electronic transmission of trade documentation, and the implementation of EU guidance on essential workers.
- 3. COMMUNICATIONS STRATEGY:** Throughout the pandemic Freshfel Europe has ensured continuous external dissemination of the sectors' efforts to maintain supply, the importance of a healthy diet rich in fruit and vegetables, as well as the need to maintain the highest hygiene measures to handle fresh produce in the current context.

In light of the COVID-19 travel restrictions, Freshfel Europe has adapted its working methods with its members to facilitate information sharing and exchange. Since March 2020 all physical meetings have been held virtually, including the Freshfel Europe Annual Event. Freshfel Europe also began a monthly Webinar Series for its members on pertinent topics to allow detailed member contributions as well as dialogue with and between members from across the supply chain throughout Europe and beyond.



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Adapting CAP policy for the EU fruit and vegetable sector

The CAP is redesigning itself in the middle of a very challenging environment driven by the negotiation of the new EU multi financial framework, the COVID-19 pandemic and the resulting severe business uncertainties, the continued uncertainty around Brexit, and the new requirements of the European Green Deal and the Farm to Fork Strategy.

The system of producer organizations with operational programmes remains the main CAP tool for the fruit and vegetables sector. However, more needs to be done to secure a greater attractiveness of the scheme, to simplify the workload of the management of the programmes and to grant more legal security for growers involved in producer organizations.

The priorities of the operational programmes and the national strategy plans will need to evolve in the coming years. They will need to reflect the new societal and environmental concerns, assist growers to cope with new requirements resulting from the Farm to Fork Strategy and look at other aspects such as research and innovation as well as promotion.

Over the last year Freshfel Europe coordinated

activities and facilitated exchange of expertise and best practices between apple and pear national associations from France, Italy and Poland on the functioning of the producer organizations and on their priorities. At the European level there are still many differences on the number of producer organizations and their overall representativeness of the sector in the different Member States. For example there is huge variation in the rate of penetration of producer organizations, which can weaken the impact and efficiency of collective actions.

Following the Freshfel Europe General Assembly's approval two years ago to set up a pan European Committee for fruit and vegetable Inter-branch organizations, Freshfel Europe has continued to collaborate with Inter-branch organizations to coordinate activities and matters specific to Inter-branch organizations in a European environment. Other horizontal and vertical topics such as promotion, quality and R&I will continue to be handled by Freshfel Europe ad-hoc committees open to all the membership. Specific activities for Inter-branch organizations will start to take place in the months following the Freshfel Europe 2020 Annual Event.



Blood Oranges, picked in the Etna plain. The natural heritage of an unique land.



Red like the lava of
the highest active
volcano in Europe.

Harvested
from January to March.



Intense
as its
color.

Harvested
from March to May.



Vivid
like
spring.

Harvested
from March to May.



Rare,
with its late
ripening.

Harvested
from May to June.



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Sustainability - a new green era

The publication of the European Commission's European Green Deal at the end of 2019 marked the beginning of a new era for sustainability.

Now at the forefront of Europe's growth strategy to become a more resource efficient and competitive economy, new sustainability initiatives in all policy areas are set to drive Europe to become **climate neutral by 2050** and **meet the UN's global 2030 Sustainable Development Goals**.

As a key policy area Freshfel Europe keeps its members **informed** of upcoming regulatory and non-regulatory sustainability developments and ensures that the **sector's interests are well represented**. In 2019 Directive (EU) 2019/904 on **single-use plastics** entered into force. Freshfel Europe has worked closely with the European Commission into 2020 on the practical implementation of this Directive to ensure correct fresh produce products are identified for plastics consumption reduction in Member States. Freshfel Europe has also been working in coordination with members and the European Commission on the recent restriction of the **use of stickers on fresh fruit and vegetables** in various Member States ahead of possible EU-wide legislation as well as on the revision of Directive 94/62/EC on **packaging and packaging waste**.

Freshfel Europe retains its seat as a member of the EU Platform on **Food Loss and Food Waste** into the Platform's mandate extension until the end of 2021. In 2019 Freshfel Europe contributed to the drafting of the Platform's recommendations for action on food waste prevention for each stage of the supply chain. In 2020 Freshfel Europe provided responses to the European Commission on the European Green Deal's key overarching sustainability policies, including the **Farm to Fork Strategy roadmap**, the **Biodiversity Strategy to 2030** and the new **Circular Economy Action Plan**.

All sustainability matters are discussed at the **Freshfel Europe Sustainability Working Group meeting**, which is held on a biannual basis and is attended by more than 30 experts from across the supply chain. The main aims of the Working Group are to keep members abreast of sustainability policy developments, provide a forum for exchange on members' concerns and hold exchanges on specific topics with external guests from the European institutions and further afield. **To adapt to COVID-19 restrictions, Freshfel Europe has substituted its biannual Sustainability Working Group meetings with monthly topical webinars on sustainability matters.**



WE HAVE COMPENSATED 9,085,990 KG OF CO₂



DISCOVER THE FUTURE

CO₂ refers to CO₂e (CO₂ equivalents)
Compensated amount refers to August 2020
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Policy from farm to fork

On the 20 May 2020 the European Commission published its flagship communication 'A Farm to Fork Strategy for a fair, healthy and environmentally-friendly food system'.

This new European Strategy is at the heart of the European Green Deal and has been formulated to accelerate the transition to a sustainable food system while simultaneously bringing new opportunities for operators in the food value chain. The Strategy sets out regulatory and non-regulatory initiatives and a proposal for a legislative framework for sustainable food systems will support the Strategy's implementation.

Freshfel Europe has welcomed the Farm to Fork Strategy as an essential tool to facilitate the provision of nutritious and affordable food to European citizens. The Strategy's ambitions to improve lifestyles, health and the environment aligns with Freshfel Europe's mission to ensure that the European fresh fruit and vegetable sector is dynamic and supplies healthy products using the highest quality, safety and environmental and social standards to meet consumers' changing needs.

The Farm to Fork Strategy will reshape policies for the fresh fruit and vegetable sector towards 2030 and beyond. Of utmost importance in the

coming years is that policy coherence between the Strategy's initiatives, which will often have diverging objectives, is prioritized so that efforts in one area not hampered by those in another.

On analysis of the Farm to Fork Strategy Freshfel Europe noted that the fresh fruit and vegetable sector is not directly supported by any concrete regulatory and non-regulatory initiatives. Despite this omission, in the course of the implementation of the Strategy Freshfel Europe will ensure that the fresh fruit and vegetable sector's competitiveness is maintained both in the short and long-term. The sector should be granted with tools to efficiently and sustainably grow fruit and vegetables and secure that growing practices match consumer expectation to prevent an unbalanced market. Reinforced tools should be introduced to boost healthy diets rich in fruit and vegetables and consumption should be facilitated across the EU to reach at least 400g of fruit and vegetables per capita per day.

During the regulatory process of the implementation of the Strategy Freshfel Europe will focus on a broad range of key policy areas. This includes production, food safety and quality related policy as well as food loss and waste and nutrition and health initiatives.



Freshfel Europe will continue its engagement with the European Commission to ensure the success of the Farm to Fork Strategy and that the fresh fruit and vegetable sector utilizes this opportunity for renewed support and tools.



Providing fresh produce
label solutions since 1982

ORIGIN

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

IDENTIFICATION

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

VARIETY

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



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

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Demonstrating commitment to consumer and environmental wellbeing by using compostable material; ideal for organic produce.

PRICE LOOK-UP (PLU)

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

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Organic on the rise

Organic farming is a growing segment in EU agriculture, and consumer interest in organic products is also growing.

In response to the challenges posed by this expansion and also to modernize the legal framework for organic production to provide an effective legal framework for the industry, the EU has passed new legislation, which was to enter into force as of 1 January 2021.

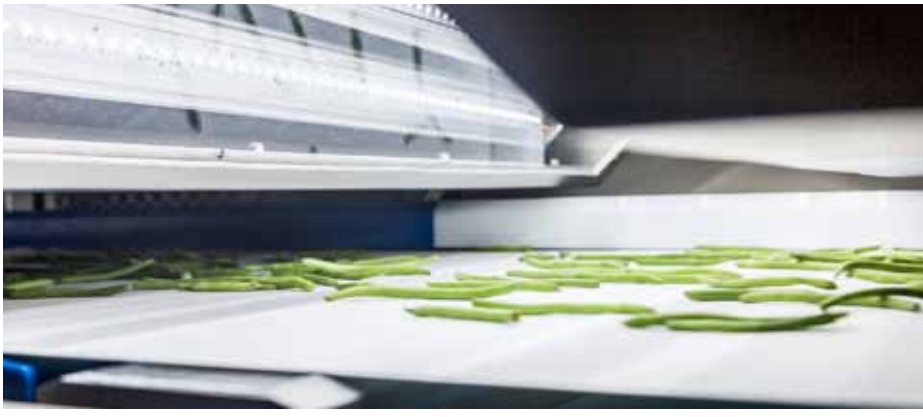
The European Commission has adopted a proposal for a Regulation of the European Parliament and the Council postponing the date of entry into application of Regulation (EU) 2018/848 and certain other dates referred to in that Regulation derived from that date, by one year from 1 January 2021 to 1 January 2022. This proposal is now being considered by the European Parliament and by the Council. Freshfel Europe believes it is essential to ensure a smooth transition between the current

and new organic regulation. With the original date of 1 January 2021, the sector would have had very

little time to put in place the adequate measures to start implementing the new rules. The postponement will enable the sector and the EU Member States to be fully ready in due time.

To achieve the European Green Deal's target of reaching 25% of agricultural land dedicated to organic farming by 2030 it will be crucial for the organic sector to be able to rely on a solid legal basis as well as having the time to correctly and efficiently implement the new rules, making the delay of one year necessary. While the preparation of the secondary legislation is already advanced, the services of the European Commission will continue to work intensively in close cooperation with Member States and the European Parliament with the objective of having all legal acts published in the first Semester of 2021.





SORTING SOLUTIONS FOR THE FRESH AND PROCESSED VEGETABLE INDUSTRY

For more than 40 years, TOMRA Food designs and manufactures sensor-based sorting machines and integrated post-harvest solutions for the food industry, using the world's most advanced grading, sorting, peeling and analytical technology.

Confidence in food safety policy

Securing consumer confidence in regards to 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, fertilizers, sanitizers and contaminants is crucial in the daily work of the Freshfel Europe Secretariat and its members.

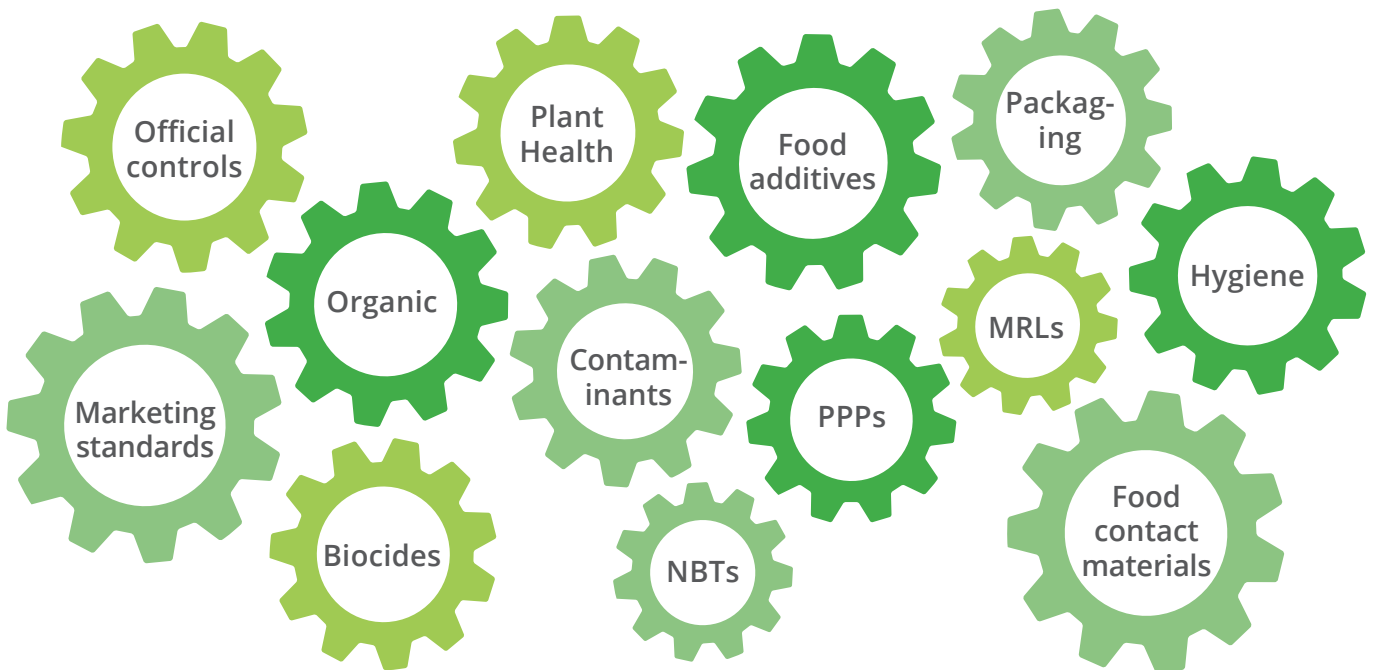
Freshfel Europe aims for full compliance with European legislation on food quality and safety, while minimising the use of chemical plant protection products (PPPs) and moving towards better agricultural practices. Freshfel Europe supports the European Commission's approach to set out relevant ambitions and actions to stimulate sustainable food production and to create new business models for food producers to thrive in a sustainable food system. In 2020 Freshfel Europe welcomed the European Commission's Farm to Fork Strategy as part of the European Green Deal to facilitate the provision of safe and high quality food to European citizens. The Strategy's ambitions align with Freshfel Europe's mission to ensure that the European fresh fruit and vegetable sector is dynamic and supplies healthy products using the highest quality and safety standards to meet consumers' expectations and changing needs.

The industry also welcomed the European Commission's initiative to assess the extent to which the Sustainable Use Directive (SUD) is implemented and applied across all Member States and to evaluate

to what extent the SUD is relevant, bearing in mind the changes in the agricultural and agri-food context during the past few years.

The European Commission recently published an evaluation (REFIT) report on the European food safety legislative framework which reassess the European regulations (EC) 1107/2009 on placing on the market of plant protection products (PPP) and (EC) 396/2005 on maximum residue levels. The European Commission's Report to the Council and the European Parliament on the REFIT evaluation of both pieces of legislation concluded that while the evaluation has found a number of weaknesses, the current legislation sets an adequate framework of pre-market approval of active substances and authorisation of plant protection products and therefore involved stakeholders are not calling for fundamental changes of the PPP Regulation. However the views of stakeholder were more divergent as regards the MRL Regulation. The report identifies sixteen areas where implementation can be improved in the short and medium term.

To adapt to COVID-19 restrictions, Freshfel Europe has substituted its biannual Food Quality Working Group meetings with monthly topical webinar sessions on food safety and quality matters. Webinars bring together approx. 30 experts from different layers of the supply chain. Through Freshfel Europe webinar sessions, Freshfel Europe members are provided with the opportunity to gain knowledge, as well as to exchange with other stakeholders on emerging matters.





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Increased focus on plant health & adapting to a new EU legislative environment

The past year has been crucial for the sector to get ready for the new EU plant health and official controls legislation, which entered into application on 14 December 2019. This new framework has important operational implications for the fresh fruit and vegetable sector, such as the extension of the phytosanitary certificate obligation almost all fresh produce imported into the EU market and the transition to a digital environment for the transmission of certifications.

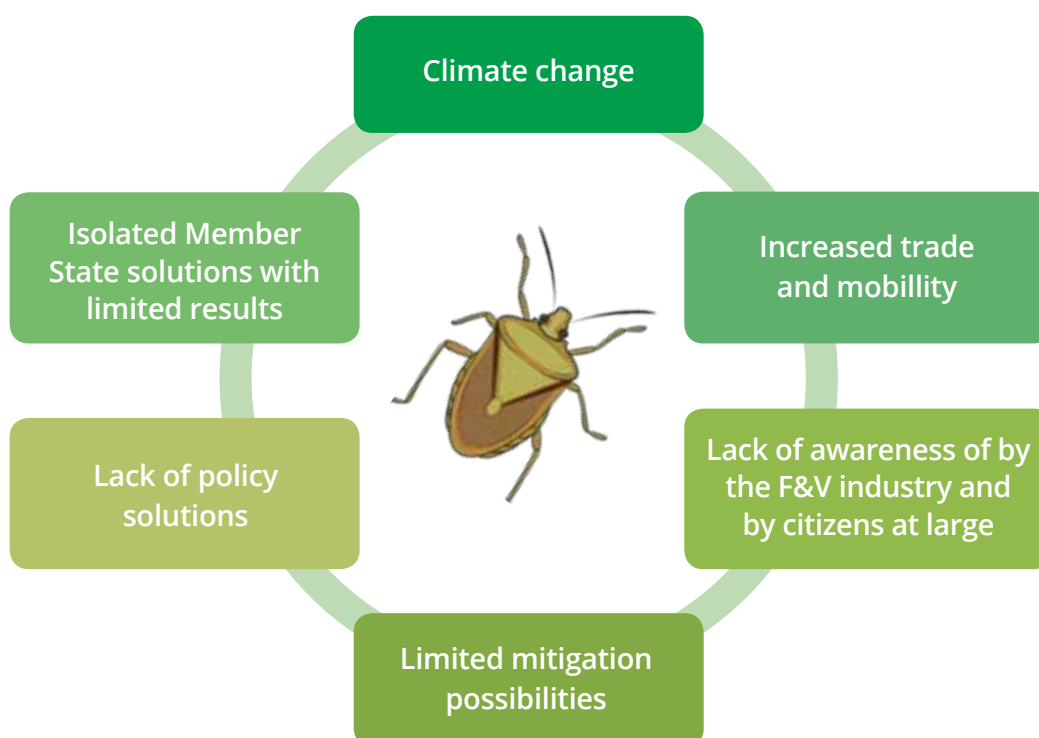
Freshfel Europe has accompanied its members in this transition, updating them regularly and providing detailed guidelines on new requirements. Freshfel Europe has also been in close contact with EU regulators in order to tackle challenges related to the sector's adaptation. This has enabled Freshfel Europe to be recognized as a key stakeholder by the European Commission on this dossier and to be invited to take part in the EU Conference on 'Smarter rules for safer food and plant health'. Moreover, in its ongoing engagement with regulators, Freshfel Europe continues advocating for increased efforts to ensure fruit and vegetable production is granted sufficient tools to counter the intensified spread of pests and diseases

due to climate change. Freshfel Europe is closely following the implementation of the new EU legislative framework, urging the European Commission to ensure a harmonized implementation in all Member States, including the establishment of the foreseen new digital environment.

Freshfel Europe continues to work with its members and the EU institutions to ensure compliance and closely monitor and identify rising threats to plant health. Worrying developments such as the spread of the brown marmorated stink bug in Europe highlights the importance of raising awareness about this issue within the sector and beyond. This will ensure the sustainability of fresh fruit and vegetable production and trade, especially given the increasing move to a more restrictive approach in the use of chemical tools.

The year 2020, the International Year of Plant Health, is the perfect opportunity to demand an increased focus on Research and Innovation in the area of plant health, on policy coherence among different priorities such as plant health and reduction of active substances, as well as on a harmonized implementation of the new regulatory environment across the EU.

Key challenges ahead for plant health





NEW LOOK,

same Quality

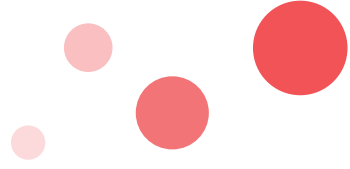
Grown and harvested following the 'Zespri System', Zespri kiwifruit meets the most stringent quality and environmental standards.

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



WWW.ZESPRI.COM





Leading food crisis management

On 2 September 2020 Freshfel Europe, in conjunction with ESSA, the European Sprouted Seeds Association, held a public digital event on Food Crisis Management.

The objective of the joint online event was to analyse former as well as hypothetical food crisis situations, the lessons learnt from them, highlight the need for prevention and identify best crisis response approaches when a crisis occurs.

Despite the European Union having the strictest regulatory framework in place, including prevention measures, food crises indeed still occur and could occur in the future. Good management of such crises is key to protecting consumers and agri-food sectors Europe-wide.

The Food Crisis Management Event provided a platform for agri-associations, food business operators, European Commission officials, representatives of EU national authorities and other stakeholders to gain knowledge through interaction and dialogue on how best to respond to European food crises. Over 200 professionals from across Europe and internationally participated in the event.

The insights gained from this event have created a starting point for further development structures and coordination within private companies, sectorial associations and institutions. Freshfel Europe and ESSA's long-term vision is to foster cooperation between stakeholders to better manage potential future crises in the agri-food sector.



Social Media campaign

#FRUITVEG4YOU

Treat yourself everyday and join us in boosting the consumption of fruits and vegetables across the EU!





Promoting market access and diversification of exports

Tackling sanitary and phytosanitary and other barriers to export, as well as to promote EU fresh fruit and vegetables exports in key markets, remains one key priority for Freshfel Europe. Only this can allow for market diversification in the post Russian embargo-era. In order to achieve this objective Freshfel Europe counts on the support from its members, the Member States, the European Commission and the EU delegations in third countries.

Thanks to the European Commission’s increased focus on trade enforcement, Freshfel Europe has been invited to take part in several EU export promotion missions, which have been the perfect opportunity to continue advocating for facilitations in market access to trade partners. For instance, Freshfel Europe was invited to moderate fruit and vegetables specific sessions in the EU Promotion Seminars for agri-food products organized by DG AGRI in Colombia, India, Hong Kong, and Mexico in 2019. Freshfel Europe also participated in the high-level business mission of former Agriculture Commissioner Hogan in Japan, and took part in the EU-Thailand Seminar on Phytosanitary Controls and Certification Systems in Bangkok, Thailand,

organized by DG TRADE. In the coming year, Freshfel Europe will continue its active participation in these EU initiatives to boost exports, particularly in Asian markets.

Freshfel Europe continues to engage with EU authorities to discuss the limited benefits EU Free Trade Agreements in force have brought for fresh produce. So far these have not removed the excessive requirements of bilateral plant health protocols, which still need to be negotiated on a product-by-product and country-by-country basis. Freshfel Europe has therefore proposed to EU authorities several innovative approaches that could be included in the SPS Chapters of EU FTAs or be discussed bilaterally with trading partners to facilitate market access. Among them, Freshfel Europe and its members support the introduction of timelines for applications, the possibility to bundle several Member States requests, and the introduction of ‘fast-track’ procedures for access of similar varieties already approved for one Member State. The EU should also urge third countries to adopt a more similar approach to the one applied for EU imports of plant products, as well as to agree on common international standards, in order to ensure reciprocal treatment in trade relations.



Follow me TO BE HEALTHY!

WITH EUROPE

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Are you up to the #400gchallenge?

www.400gchallenge.eu

982 | 36 599 | 1 002



ENJOY
IT'S FROM
EUROPE



CAMPAIGN FINANCED
WITH AID FROM
THE EUROPEAN UNION

THE EUROPEAN UNION SUPPORTS
CAMPAIGNS THAT PROMOTE
A HEALTHY LIFESTYLE.



The benefit of COVID-19 on digitalization



Digitalization is still a very fresh part of Freshfel Europe's portfolio. However, digitalization has been gaining significance over the past few years and this has been accelerated as a result of the effects of the COVID-19 pandemic.

Freshfel Europe is focusing on two key areas in regards to digitalization in the sector:

Making trading operations more efficient through electronic certification and customs operations:

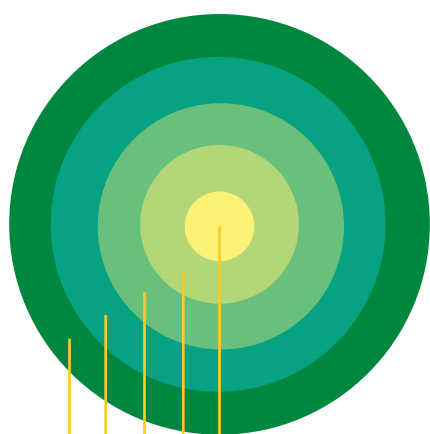
In close collaboration with the European Commission as well as with the International Plant Protection Convention, Freshfel Europe has been steering developments towards paperless transmission systems for the Certificate of Inspection for Organic, for EUR-1's and for phytosanitary certificates before and after the implementation of the new Official Control Regulation 2017/625 as well as in the acute emergency situation of the COVID-19 pandemic. Freshfel Europe has high hopes for the final roll

out of electronic signatures in the second part of 2020. The last few years have been marked by high educational and communication efforts to unravel the complex network of global and European endeavours and to bring the right counterparts together. This development could hugely facilitate EU imports and exports.

Understanding the current market situation for EU fruit and vegetable online sales:

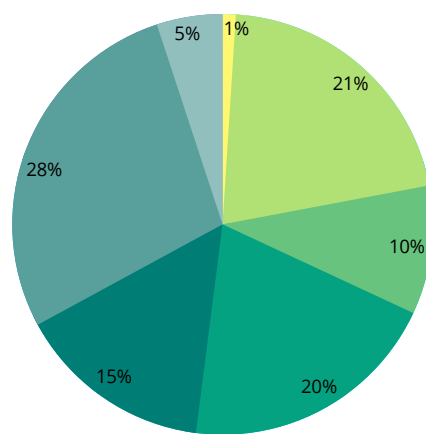
Freshfel Europe has undertaken a first common assessment study together with the OECD Fruit and Vegetables on the structure of the online sales market, trends and challenges with regard to business developments, consumer attitudes and consequences of this evolution for the regulatory environment. The study, which was completed in July 2020, highlighted that there is a strong fragmentation of the fruit and vegetable online sales market in the EU. Further analysis of the results and impact for potential regulatory steps will mark a growing field for Freshfel Europe activity in the coming year.

The 2019/2020 EU fruit and vegetables online sales market



- Fragmented and highly diversified/
Lack of transparency
- Organic/altruistic/niche offer
- Amateur level, nationally limited
- Mainly private consumers addressed
- Fruit and vegetable baskets operate beyond legal compliance

Overall study findings on market structure



- Key:
- 1% Online retailer, Private consumers, Delivery at doorstep/Collecting point
 - 21% Retail shops, Private consumers, Collecting point
 - 10% Retail shops, Private consumers, Delivery at doorstep
 - 20% Agricultural producers, Private consumers, Delivery at doorstep
 - 15% Agricultural producers, Private consumers, Collecting point
 - 28% B2B suppliers, Professional clients, Delivery
 - 5% Citizenship initiatives, Private consumers, Delivery

Promoting fruit & vegetable consumption

EU promotion policy

The European promotion policy Regulation (EU) No 1144/2014 remains an important cornerstone of the fresh fruit and vegetable sector's promotion of its products on the internal market and in third countries. To ensure that this policy matches the sector's evolving needs Freshfel Europe has continued to provide a contribution to the European Commission's Annual Work Programme (AWP). As a result of this work since 2018 Freshfel Europe has successfully maintained a dedicated budget of €8 million in the AWP to support programmes promoting a healthy diet rich in fruit and vegetables.

Freshfel Europe additionally participates in the annual Chafea Info Day in Brussels and during the 2020 edition the 'Follow me to be healthy with Europe!' campaign was featured in the poster session. Furthermore, Freshfel Europe always partakes in the European Commission Civil Dialogue Group on Quality and Promotion, which is biannually and to which Freshfel Europe representative Ms. Simona Rubbi (CSO) is the Vice-Chair.

Follow me to be healthy with Europe!

In 2019, Freshfel Europe and Aprifel (French

Agency for Research and Information on Fruit and Vegetables) launched an EU-wide promotion campaign as part of Chafea's provision and promotion measures for agricultural products to increase fruit and vegetable consumption levels across Europe. The three-year campaign aims to increase awareness of 1.5 million European young adults (18-30 years old) of the importance of consuming fruit and vegetables in their daily diet to at least 400g per day, which is the minimum recommend by the WHO.

The digital-first initiative, which celebrated its first anniversary in July 2020, has so far generated over 32 million impressions on Instagram, Facebook, Twitter, and YouTube with the hashtag #400gChallenge.

The campaign has released monthly videos, infographics and tips on how millennials can increase their fruit and vegetable consumption at this critical point in their lives when eating habits are adapted to their changing lifestyles. High profile social media influencers from across Europe have helped further disseminate the campaign's messages. The campaign has also been present at the 2019 Eurockéennes festival, the Paris Manga -Sci-Fi Show in France, and at the 2020 POLITICO EU Study and Career Fair in Belgium.

67,507 website page views since launch

+1.1 million views of campaign video content

+200,000 clicks on campaign content

Campaign amplified by 18 online influencers from key markets



Freshfel Europe in focus





Become a Freshfel Europe member

Be part of this unique network that will increase your business potential & get your voice heard at European level on key policy issues. Business decisions begin in Brussels!

FRESHFEL EUROPE MEMBERSHIP BENEFITS:



GAIN KNOWLEDGE

- Timely updates on the European dimension of fresh produce policy making.
- Bespoke personal advice on technical EU legislation & legislative developments.
- Exchange with players involved in production, trade & retail from across Europe & beyond providing you with invaluable knowledge & insights.
- In-depth information on European legislative proposals, implementation, implications & 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.



EXCLUSIVE DATA ACCESS

- Exclusive access to European & global production, trade & consumption data.



BE A SECTOR LEADER

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



GET YOUR VOICE HEARD

- Have direct & face-to-face exchanges with European Commission officials in charge of legislative developments.
- Contribute to Freshfel Europe's activities & make a difference to the future of your business.
- Enhance the visibility of your business within the supply chain at EU level.



MEMBERSHIP FEES & MORE INFORMATION AT:

www.freshfel.org/member/about-membership



Freshfel Europe membership

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Freshfel Europe membership

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International associations linked to Freshfel Europe





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