



# THE FRUITS AND VEGETABLES INDUSTRY SERIES

14 September 2021

## Session N°1

### Market trends and prospects of a dynamic sector



INTERNATIONAL YEAR OF  
**FRUITS AND VEGETABLES**  
2021



FRUIT AND VEGETABLES SCHEME



# The Fruits and Vegetables industry: market trends and prospects of a dynamic sector

**Between heavy competition and much needed competitiveness resulting from collective approach**





# Freshfel Europe: a vertical organization serving the fresh fruit and veg sector



European fresh fruit and vegetables Association

## Brussels-based

Across the EU and  
across the chain from  
production down to  
retail

Membership driven =>  
Association and private  
Cie

Key policy areas :  
Agriculture, Trade, Food  
and plant safety,  
Nutrition and health ,  
R&I

[www.freshfel.org](http://www.freshfel.org)





## Horizontal cooperation

Making the difference in the complex EU bubble



## Vertical cooperation

Uniting force for fresh produce under a single voice



# Policy priorities Freshfel Europe (non exhaustive)

## Agriculture

- Common Agricultural Policy Unfair trading practices
- Market analysis
- Production matters
- New breeding techniques

## Food and plant Safety

- Pesticide Legislation
- Mediation with pesticide companies
- MRL's
- Endocrine disruptors

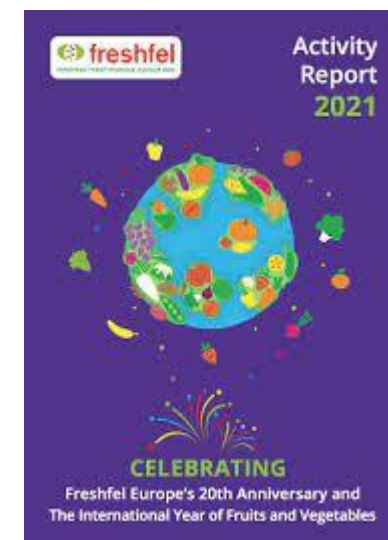
## Trade

- SPS
- TBT's
- Import/Export
- Customs Operations
- FTA's
- Market Access to 3rd Countries

## Health and Nutrition

Promotion  
Claims  
Labelling  
Consumption

Sustainability  
Green Deal  
Farm to Fork  
Organic  
Biodiversity



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**Freshfel Europe Governed by a board & committees defining the overarching strategy**

*A local business within  
a global environment*

## IMPORT

**130 partners**

16.2 mio. t

(17.3 billion €)

**International component**

**EU Production: 80-85  
Mio T**

(>60% for domestic  
consumption where grown =

**local component**

**Intra-EU trade**

33 mio T

(35.6 billion €)

**Trade component**

## EXPORT

**145 destinations**

4.8 mio. t

(4.7 billion €)

**International component**

➤ **5 million jobs**  
**Social component**

➤ **200 billion €**  
**Economic component**

## **Competition => a essential driver for the sector evolution**

- Competing with other agriculture product within CAP unbalance : F&V: 3% budget but 20% value
- Competing with the high margin and heavily branded agrifood sector
- Competing inside the fresh produce sector among categories, varieties, season ( global v local), origins, certification types, branding
- Competing to access customers: retail and discount, grocery shops and food services
- Competing towards new technology & Innovation for more convenience better shell live, taste and texture
- Multiple reality: no one size fits all

## **Competition might need ( public – private governance) tools to respond challenges**

- Market (in)stability: impact of climate on supply and demand
- Crisis management
- Market trends and information
- Contingency planning for food security
- Highlight the collective value of the sector
- Secure diversity of supply year round

## **Benefit of collective actions within the European environment**

- Benefits are for sector and decision makers
- Confidence in regulation
- Harmonization to prevent private standards
- Generate a level playing field for the implementation of legislation ( pesticides controls and due diligence, UTP, ..)
- Food and plant safety: monitoring to prevent crisis
- High value and job market and great outlook for fruit and veg
- CAP policy towards concentrating the supply and supply management

## **Some success stories : Areas of Freshfel Europe collective solutions**

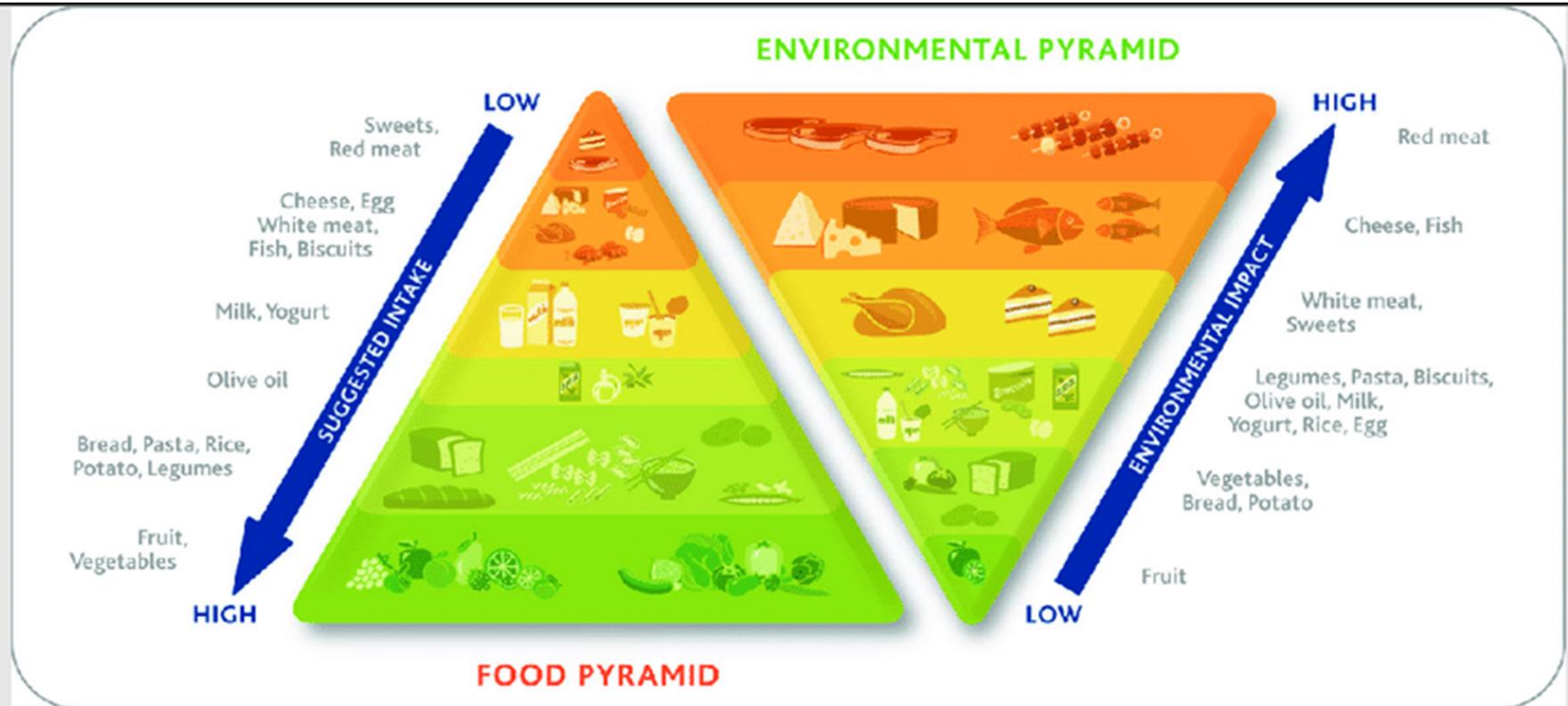
- Generic promotion
- Communication (crisis management )
- COVID collective response (seasonal workers, transports, market access, digitalization,..)
- Market intelligence & market observatory
- Market access ( joint protocols and same SPS rules)
- Marketing standards (e.g. evolution of technology )
- Food safety scheme: Fel Partenariat: DFHV-QS
- Plant Health: push for e-phyto
- Sustainability : LCA methodology, packaging
- R&I ( alternative to PPP)



The Fruits and Vegetables industry: A positive market trends and prospects from a dynamic sector and a unique momentum facilitated by a collective and transparent business approach within Freshfel Europe



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# Thank you!

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FRUIT AND VEGETABLES SCHEME



# Thank you



*This series of events is organised by the OECD Fruit and Vegetables Scheme and COLEACP. COLEACP operates within the framework of development cooperation between the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union (European Development Fund – EDF), with the support of the French Development Agency (AFD).*