



THE FRUITS AND VEGETABLES INDUSTRY SERIES

10 June 2025

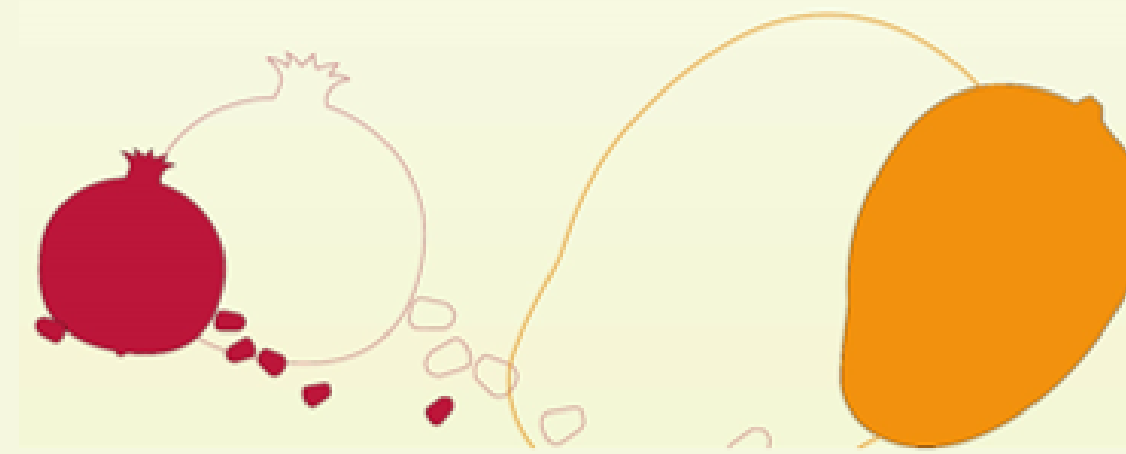


Session n°10

**The rise of convenience: How ready-to-eat
foods are reshaping the Fruits and
Vegetables sector**



FRUIT AND VEGETABLES SCHEME



The rise of convenience: How ready-to-eat foods are reshaping the F&V sector

OECD - OCDE COLEAD



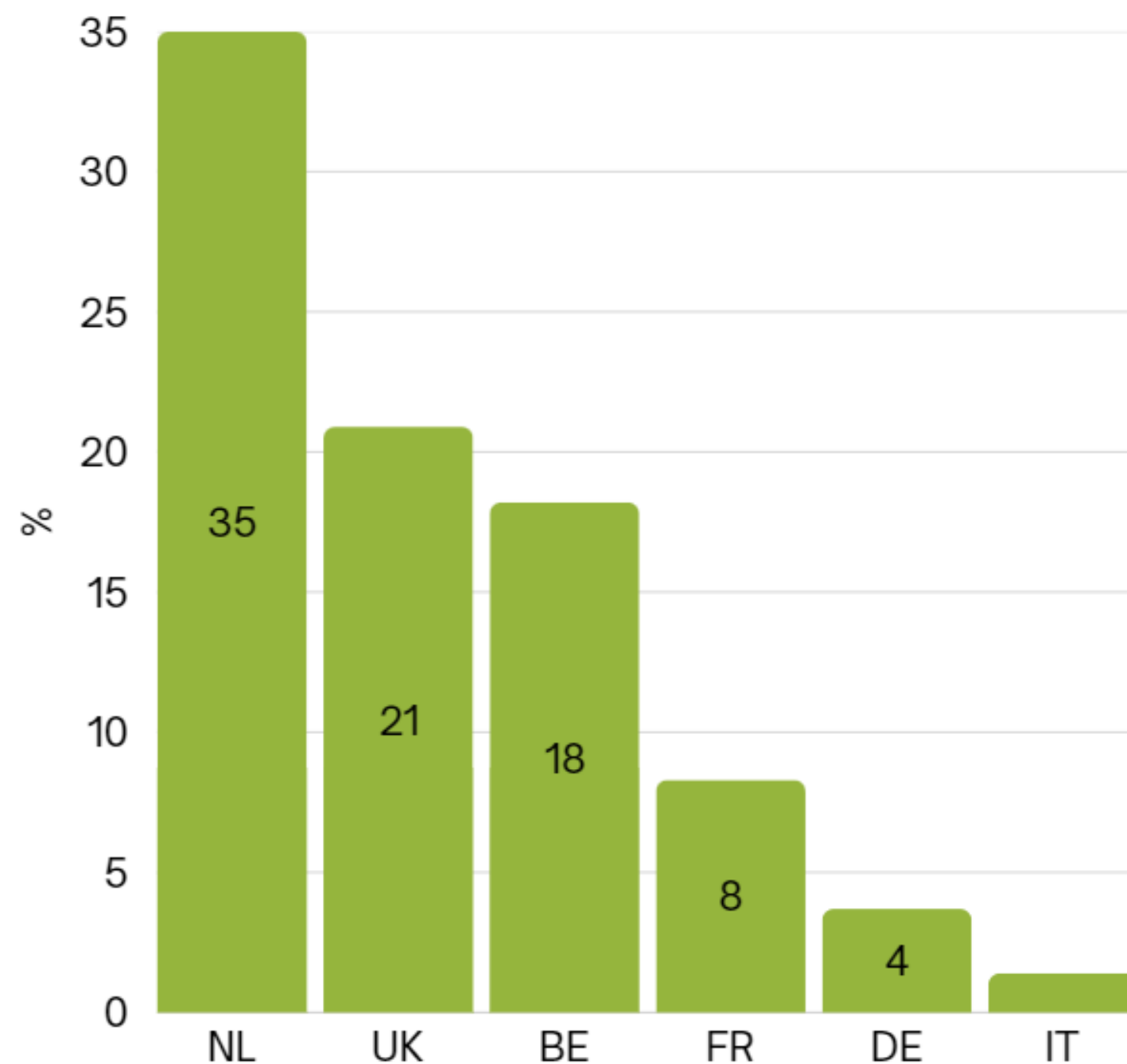
Presented by: Eglè Baecke, Director Advocacy & Regulatory Affairs. Freshfel Europe



Western Europe retail market >€4bln, similar size in food service

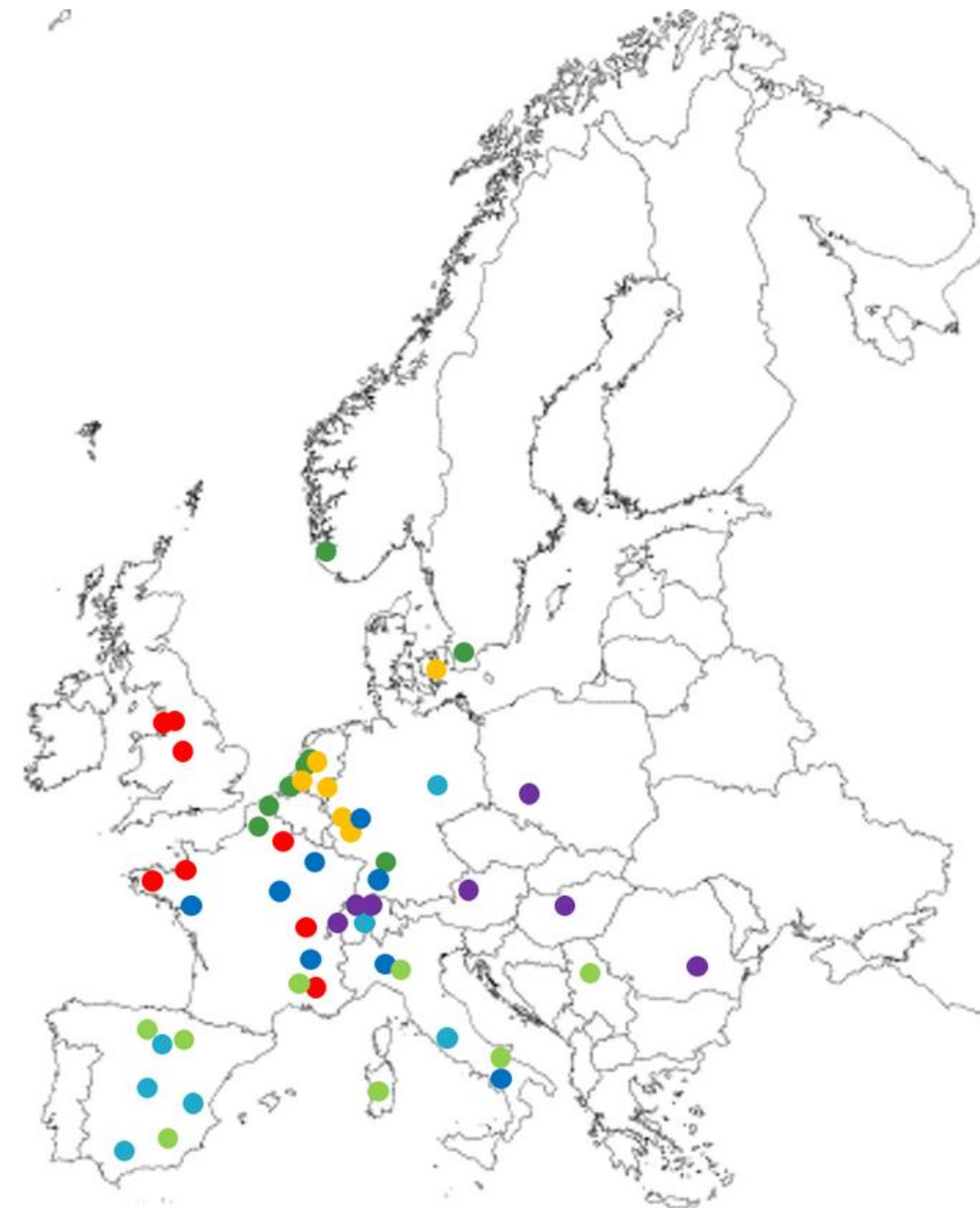


Share fresh-cut vegetables in fresh vegetable basket (value)



Source: AMI analyse auf basis von kantar worldpanel und GfK

Production sites in the EU & beyond



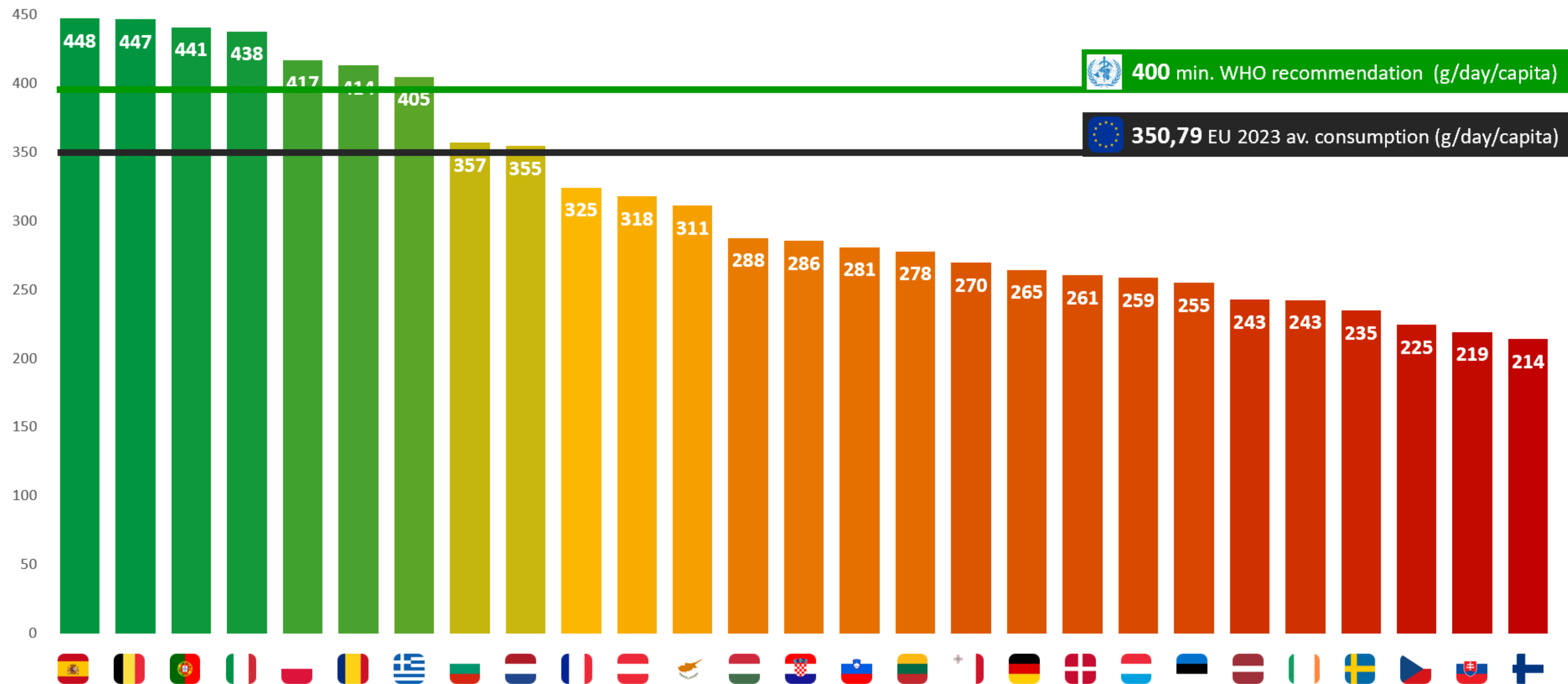
Source: Greenyard

READY-TO-EAT MARKET IN THE EU

POTENTIAL GROWTH & CONSUMER EXPECTATIONS



- No growth in 2024 in IV-gamma sales: due to inflation.
- Consumers choose cheaper food options, either intact F&Vs, or less healthy alternatives. E.g. in the NL in 2024 overall consumption of fresh F&Vs decreased by 3%.
- Large differences of fresh cut F&V market within the EU due to cultural differences, traditions and cooking habits.
 - E.g. market share (intact & pre-cut) in NL 40% & DE 2 %, product range and assortment are completely different.
- Significant growth of the market is not expected.
 - Regulatory environment and access to consumers prevent FBO in other countries from elaborating in this segment at a significant level.
- Private & public efforts is a must to promote healthy diets, to improve the health of European consumers.
- Intact & pre-cut F&V commodities should be at the center of European policy. Policy makers do not deliver on such objective.



Source: Freshfel Europe Consumption Monitor 2025, based on data 2023

READY-TO-EAT MARKET IN THE EU

CHALLENGES FOR PRODUCERS & DISTRIBUTORS



- Sourcing of raw materials depends on regular contracts; however, this is not always possible due to climatic events such as droughts or prolonged cold periods, crises, logistical constraints, etc.
- Continuous cold chain is key for quality and safety.
- RTE products have a short shelf life (use-by-date), thus logistical distance of the final products is limited.
- Hygiene requirements: microbiological criteria for production facilities & testing of produce. RTE products are perceived as high-risk.
- Commission Regulation (EU) 2024/2895 - applicable as from 1 July 2026, on Lm:
 - Requires expertise, financial resources to conduct needed tests & access to laboratories.
 - High pressure on SMEs.
- Evolution of packaging legislation (Reg. 2025/40): RTE foods exempted, but future is unpredictable. No alternatives to plastic packaging.
- Trade is mainly determined and restricted in distance by the local consumer preferences & short shelf life.
- National regulatory differences: national law on biocidal products.

RTE MARKET IN THE EU

COMMISSION DELEGATED REGULATION (EU) 2023/2429

& ORIGIN LABELLING



- Origin labelling requirement applicable as from 1 January 2025 – Commission Delegated Reg. (EU) 2023/2429:
 - requirement is based on legislative framework that was built at the time RTE segment was not significant
 - legislation imposes same origin labelling rules as for intact F&Vs
 - unfair for FTE segment, e.g. frozen do not need to follow the same rules
- Origin labelling does not contribute to traceability.
- Interest in origin of RTE is limited compared to fresh intact.
- Legally origin indication is always possible as a voluntary option if it works as promotional tool (e.g. frozen berries case due to Hepatitis A in NL).

REGULATORY CHALLENGES



COMMISSION DELEGATED REGULATION (EU) 2023/2429 & ORIGIN LABELLING

	Legislative requirement for origin labelling	Practical impact of legislative requirements
Single ingredient product	Specific origin	1 origin
Mix of multiple ingredients	EU & non-EU, EU, non-EU	1 origin of each ingredient
Salads (e.g. cesar salad) with multiple ingredients of F&Vs.	EU & non-EU, EU, non-EU	1 origin of each ingredient
Salads (pasta salad with some cherry tomatoes) with one F&V component.	Specific origin Does it need to mention that specific ingredient?	1 origin

REGULATORY CHALLENGES



COMMISSION DELEGATED REGULATION (EU) 2023/2429 & ORIGIN LABELLING



2 origins

Cutting multiple origins
=> to prevent cross-
contamination of origins,
after each origin is cut,
the production line must
be emptied.



2 origins

Cross-contamination of
origin has nothing to do
with traceability, safety
or quality.



3 origins

EXAMPLE



Depending on customer requests,
these F&Vs could be used as
ingredients in e.g. 10 “recipes” with
different compositions.

IV gamma production is unique:
depending on producing country,
daily 200-300 different products
made using up of 60-70 types of
fresh F&V products. Multiple
sourcing origins are unavoidable,
e.g. lettuce can have 6 or more
different origins on the same day.

REGULATORY CHALLENGES

COMMISSION DELEGATED REGULATION (EU) 2023/2429 & ORIGIN LABELLING



Limitation of 1 origin results in:

- Lack of flexibility to adjust according to the supply.
- FTE FBOs tend to focus on big suppliers to avoid origin change => leaving behind smaller volumes from other countries or even local small suppliers if operations were required to be significantly adjusted.
- Switch of origin => the bath/production line must be cleaned => lost time, food waste, water waste.
- Huge investments due to IT adaptation.
- Impact on price, for producer or consumer => too early to assess given that implemented 6 months ago.

REGULATORY CHALLENGES

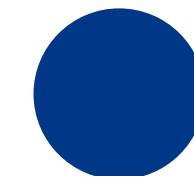
COMMISSION DELEGATED REGULATION (EU) 2023/2429 & ORIGIN LABELLING



- EC's proposal to impose the mandatory origin labelling on IV gamma products was based on political not taking into account economic, environmental or social sustainability:
 - 2015 study of DG Sante concluded: the increase of cost associated with origin labelling would not increase proportionally the usefulness of the information provided to consumers.
 - Multiple studies confirm that origin is not a detrimental factor when choosing foods.
 - Consumers always indicate "price" as a more important factor than "origin".
 - Convenience & price plays a role in consumer choice, rather than origin.
- FBOs need a flexibility to source fresh F&Vs from various origins to ensure a sufficient supply.



MANY THANKS





THE FRUITS AND VEGETABLES INDUSTRY SERIES

Thank you



FRUIT AND VEGETABLES SCHEME

