

#### THE FRUITS AND VEGETABLES INDUSTRY SERIES

5 November 2025



#### Session nº11

Market dynamics in the F&V industry: The role of supermarkets and large retailers in shaping market trends and prices











# OECD work on food systems

Market dynamics in the Fruits & Vegetables Industry:

The role of supermarkets and large retailers in shaping market trends and prices

**OECD-COLEAD Webinar** 

4 November 2025





Who we are

- International organisation based in Paris
- 38 member states across the world, representing 80% of global trade
- 3000+ employees

What we work on

- The full range of social, economic and environmental challenges...
- More than 30 committees on topics such as tax evasion, best practices in education, foreign aid... and **food systems**

How we work

- Inform & advise unique source of data, analysis and insights
- **Engage & influence** bringing policy makers and experts together to exchange ideas
- Set standards & provide policy support





#### Food systems are facing a daunting triple challenge

**FOOD SECURITY AND** NUTRITION Food availability, access to food, healthy diets ENVIRONMENTAL LIVELIHOODS **SUSTAINABILITY** Decent jobs, Production income systems, Climate change

We are still far r from achieving healthy diets for all

Food systems exert important pressures on the environment

Better policies can make a difference !



https://doi.org/10.1787/ddfba4de-en



## Recent OECD food systems work









- Measuring the environmental impacts of food systems, in particular carbon footprint
- Communicating the environmental impacts of food products
- Food loss and waste policies





- Food security and nutrition
- Policies for encouraging healthier diets, and in particular food labels for improved health outcomes
- Food insecurity and food assistance programmes across OECD countries



and inclusivity

-ivelihood



- Concentration and market power in the food chain
- Equal opportunities and food systems

Resilient food systems + Consumers' behaviour + Accession/country reviews



## Food security and nutrition



## Four-track policy approach for encouraging healthier and more sustainable food choices

1st track: Demandside interventions

4th track: Fiscal measures 2nd track:

Public-private collaborations

3rd track: Stricter regulations





## Insights on simplified nutrition labelling policies



#### Examples of simplified nutrition labelling: Smoked ham





























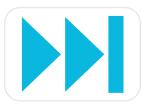




Evaluation needs



Policy process



Adjustments



## Consumers' behaviour



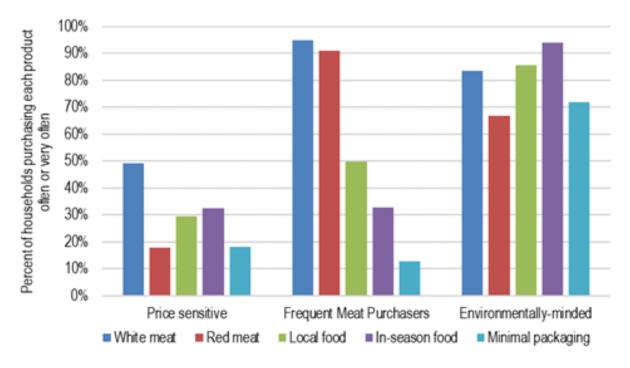
# Household profiles in food consumption habits



Three types of households identified through latent class analysis:

- Price sensitive [24%]:
   Low meat consumption, occasional purchase of products perceived as responsible
- Frequent Meat Purchasers[43%]:
   High meat consumption, occasional
   purchase of products perceived as
   responsible
- Environmentally-minded [33%]:
  Relatively high consumption of meat,
  regular purchase of products
  perceived as responsible

Share of respondents purchasing each type of product often or very often



Source: Household food choices: New empirical evidence and policy implications for sustainable behaviour (2025)



## How do consumers relate to sustainability claims?

- Interest in natural, locally produced, eco-friendly and organic claims
- Willingness to pay more varies across countries
  - Lack of understanding/clarity
  - Higher income and education
  - Small effects of age/gender
  - Role of broader attitudes and beliefs regarding the environment
  - Country-specific factors: Wider trust in institutions





# Enabling Trust in Food Labels for Improved Environmental Outcomes



# Simplified environmental labelling schemes: a new trend

Front-of-Pack labels

Aggregated environmental outcomes

Established measurement method















## How can simplified environmental labels influence consumer food choices?





Demand-side:
More informed food
choices

Supply-side:
Incentives for
producers to shift to
more sustainable
practices

Need information on actual

- not average - environmental impacts



## Simplified environmental labelling schemes: what can policymakers do?

- Support the development of a reliable and widespread evidence-base
- 2. Support experiments to study:
  - How consumers understand and use these labels,
  - How producers can be incentivised towards more sustainable practices.
- 3. Provide guidance on how to substantiate conveyed messages



#### **Policy Brief**

#### Enabling Trust in Food Labels for Improved Environmental Outcomes Insights from OECD analysis

14 March 20

#### Key messages

- A new trend in initiatives to communicate the environmental impact of food products is the
  development of simplified environmental labelling schemes that aim to communicate
  aggregated environmental outcomes based on an established measurement methodology.
  They take the form of an easy-to-understand label displayed on food products at the front-ofpack.
- Despite a lack of harmonisation on what environmental outcomes to measure and how to measure them, and a lack of impact assessments, these schemes are being developed, pilot tested and sometimes implemented.
- Such schemes could play a role as part of a wider policy package aimed at influencing consumer
  choices towards more sustainable food products by enabling more informed food choices and
  creating incentives for producers to shift to more sustainable practices.
- To send the right signals to consumers and producers, simplified environmental labels shoul
  ideally communicate actual environmental impacts, not just average impacts.
- Drawing a parallel with work on the role of labels in encouraging healthy food choices, simplified
  environmental food labelling schemes are not a silver bullet. It is likely that they may have very
  limited impacts on the demand side (actual changes in food choices). The extent to which they
  could create incentives for producers to shift to more sustainable practices also needs to be
  explored further.
- In collaboration with private actors, policymakers can contribute to building trust in these
  initiatives and thus effectively encourage behaviour change:
- Policymakers can support the development of a reliable evidence base on the actual (not average) environmental impacts of food products and on the effectiveness of simplified environmental labelling initiatives.
- Policymakers need to collaborate at the international level to improve coherence and consistency in the labelling landscape. Fragmented approaches risk undermining consumer trust, disincentivizing private sector behaviour change and undermining the benefits of global aerifood trade.
- Policymakers can support experiments to study how consumers understand and us simplified environmental information and how the supply side can change their practices.

ENABLING TRUST IN FOOD LABELS FOR IMPROVED ENVIRONMENTAL OUTCOMES © OECD 2025





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## Thank you









