



# THE FRUITS AND VEGETABLES INDUSTRY SERIES

5 November 2025



## Session n°11

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



FRUIT AND VEGETABLES SCHEME



# 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

# The OECD in a nutshell

## 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

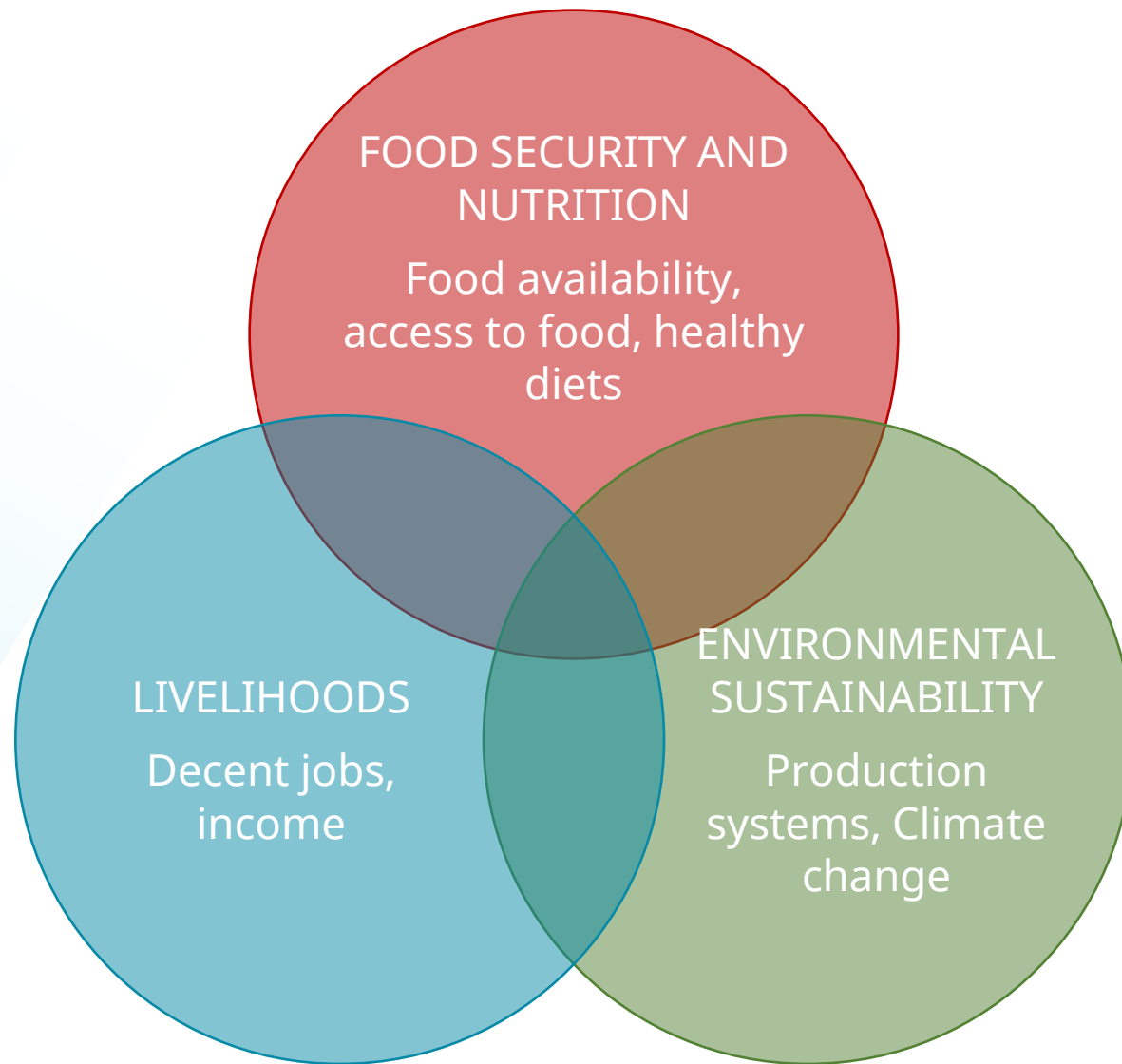
- The full range of social, economic and environmental challenges...
- More than 30 committees on topics such as tax evasion, best practices in education, foreign aid... and **food systems**

## 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



We are still far r from achieving healthy diets for all

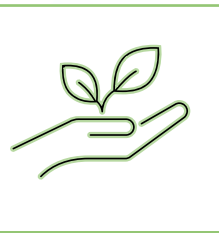
Food systems exert important pressures on the environment

Better policies can make a difference !

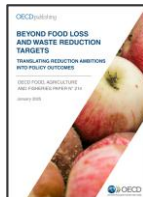
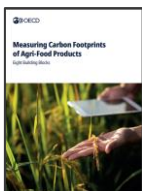




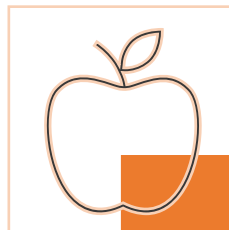
# Recent OECD food systems work



## Environmental sustainability



- 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



## Livelihood and inclusivity



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

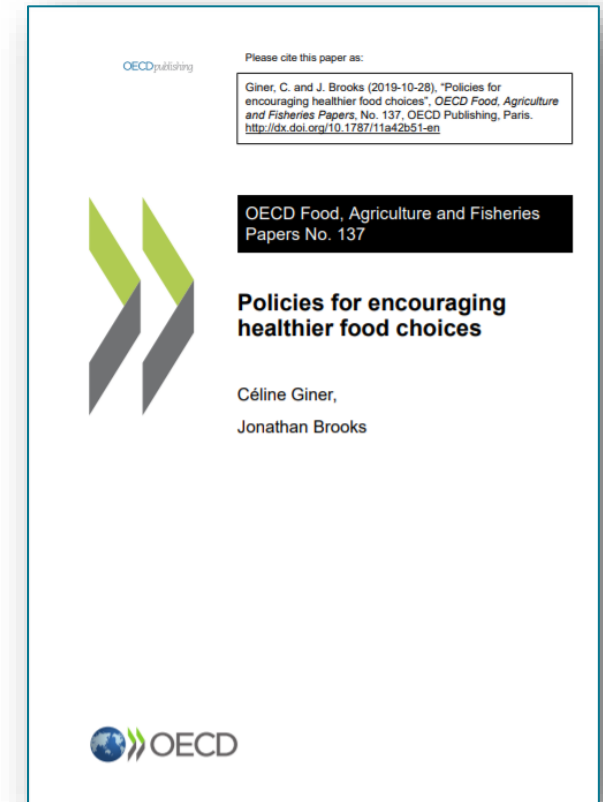
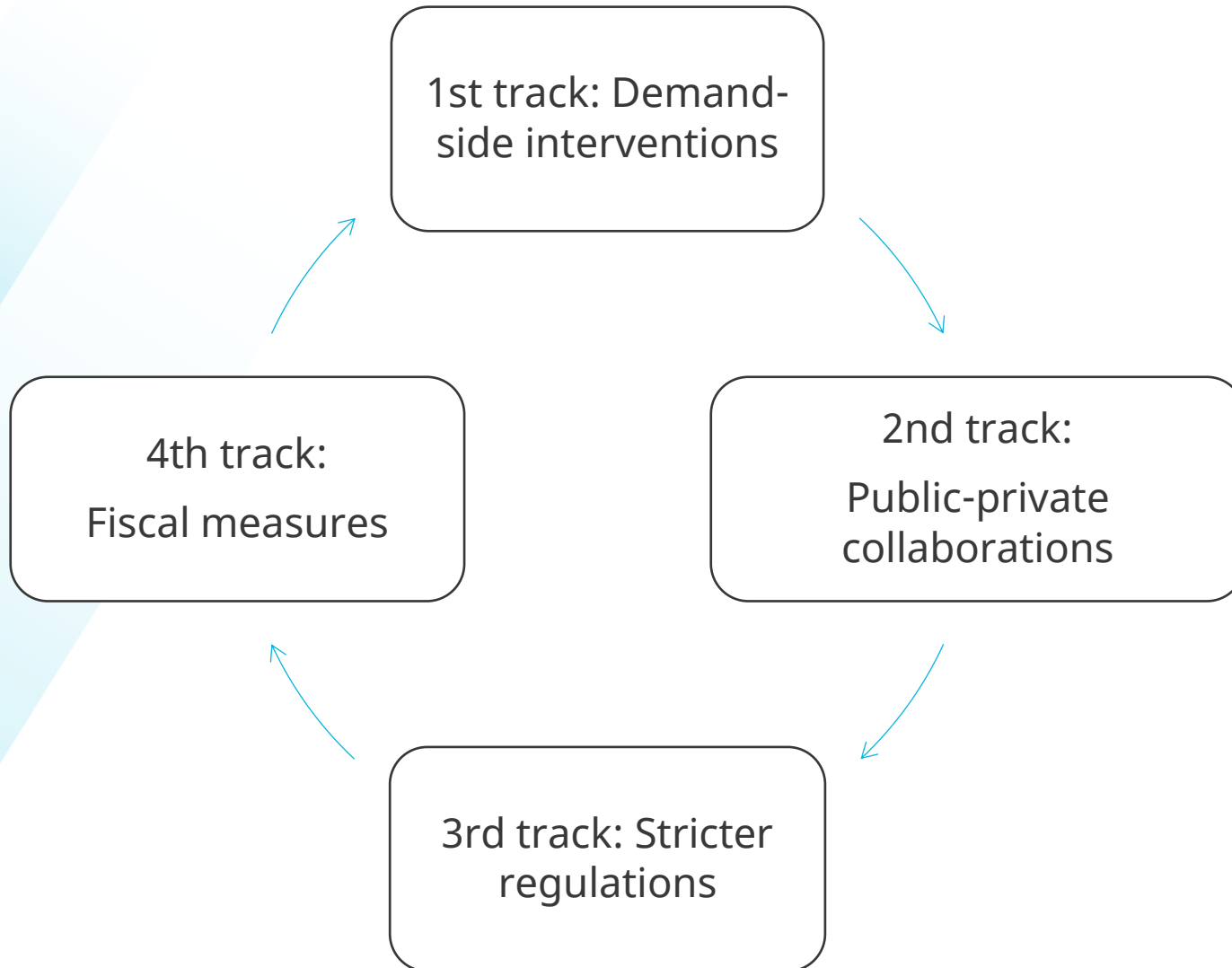
Resilient food systems + **Consumers' behaviour** + Accession/country reviews



# Food security and nutrition



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





# Insights on simplified nutrition labelling policies

## Examples of simplified nutrition labelling: Smoked ham



Source: OECD (2023), OECD Food, Agriculture and Fisheries Paper N° 203: Developing Food Labels for Improved Health Outcomes, OECD Publishing, Paris.



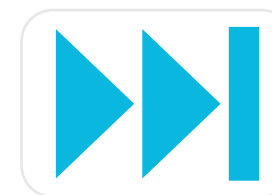
Impacts



Evaluation  
needs



Policy  
process



Adjustments

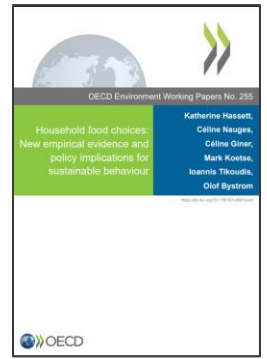




# Consumers' behaviour



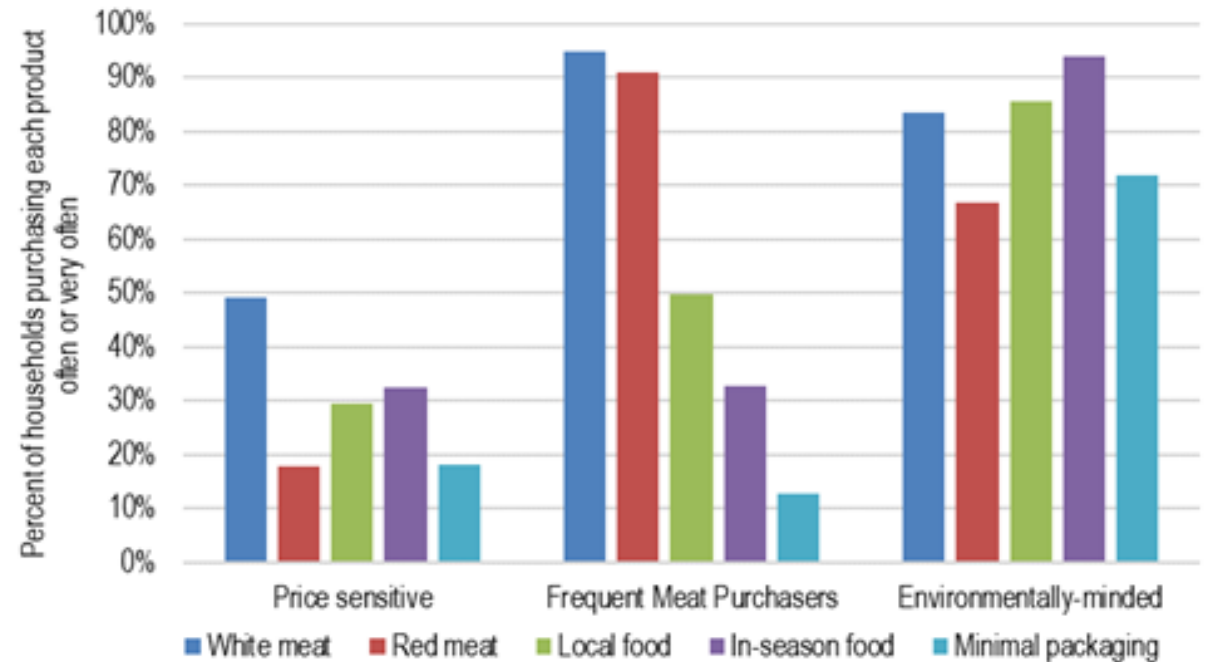
# Household profiles in food consumption habits



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*

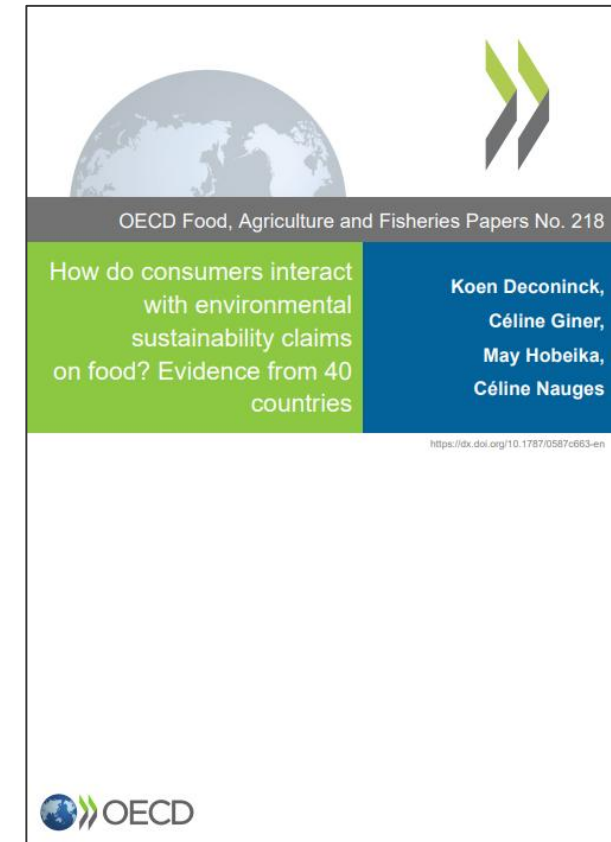


Source: Household food choices: New empirical evidence and policy implications for sustainable behaviour (2025)



# 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

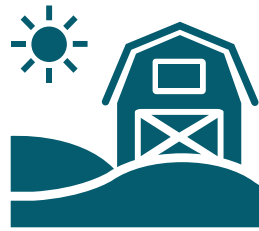




# How can simplified environmental labels influence consumer food choices ?



**Demand-side:  
More informed food  
choices**



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

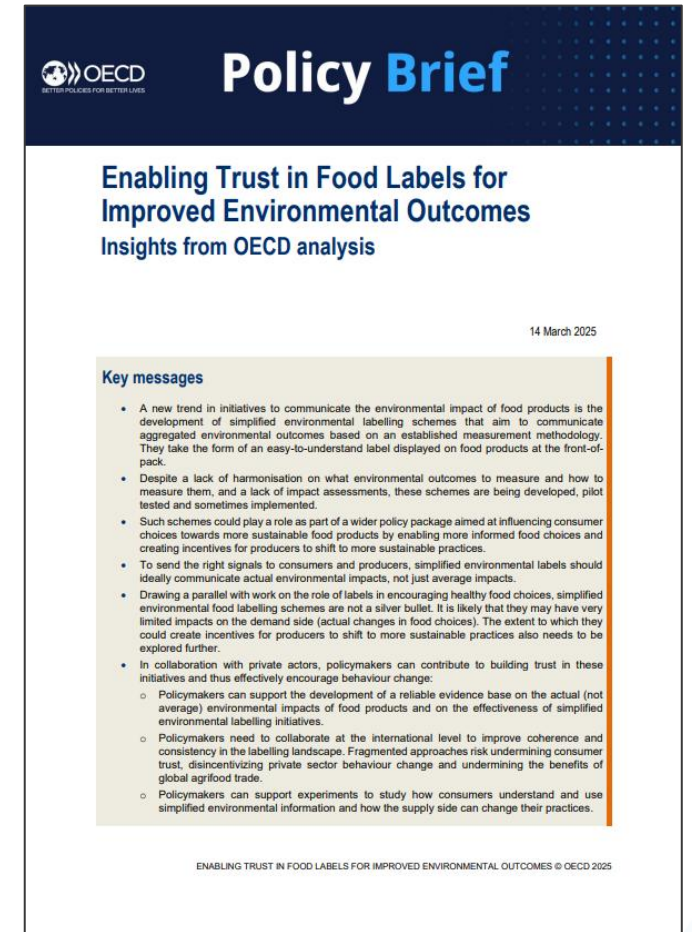


**Need information on  
actual  
– not average –  
environmental  
impacts**



# Simplified environmental labelling schemes: what can policymakers do ?

1. 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





# Contact us



Access all of the OECD's research and analysis on trade at:

[www.oecd.org/trade](http://www.oecd.org/trade)  
[www.oecd.org/agriculture](http://www.oecd.org/agriculture)



You can reach us via e-mail by sending your message to:

[tad.contact@oecd.org](mailto:tad.contact@oecd.org)



We invite you to connect with us on Twitter by following:

[@OECDtrade](https://twitter.com/OECDtrade) / [@OECDagriculture](https://twitter.com/OECDagriculture)





## THE FRUITS AND VEGETABLES INDUSTRY SERIES

# Thank you



FRUIT AND VEGETABLES SCHEME



*The OECD-COLEAD Fruits and Vegetables Industry Series focuses on market access conditions and opportunities for the fruit and vegetable sector, especially for fruit and vegetables producers and exporters from ACP-countries. This activity is supported by the Fit For Market Plus programme, implemented by COLEAD within the Framework of Development Cooperation between the Organisation of African, Caribbean and Pacific States (OACPS) and the European Union.*