



THE FRUITS AND VEGETABLES INDUSTRY SERIES

5 November 2025

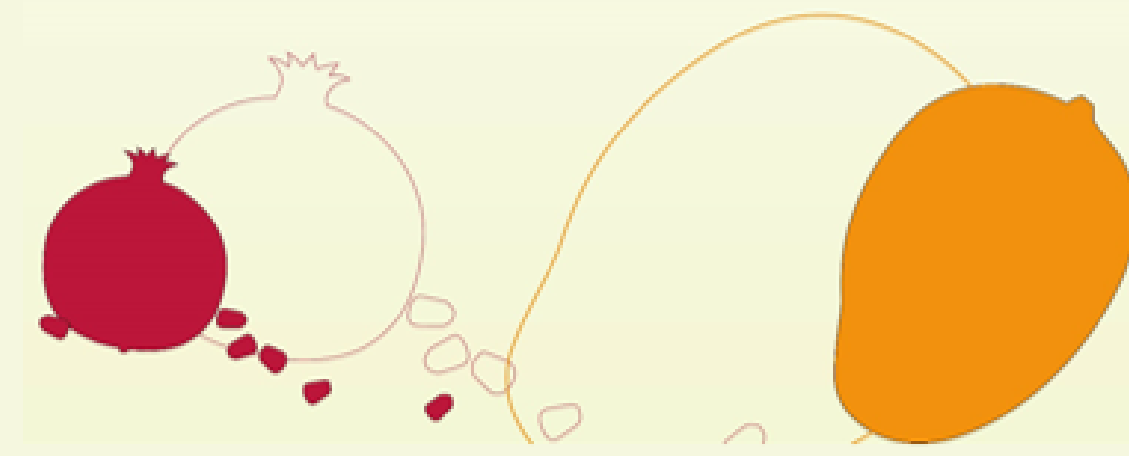


Session n°11

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



FRUIT AND VEGETABLES SCHEME





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







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Freshfel Europe - introduction



-  The European Fresh Fruit and Vegetables Association, with both associations and companies in its membership
-  Represents the entire fresh produce supply chain, from producers down to retailers
-  Platform for the sector on joint projects and advocacy on key policy issues relevant for the supply chain within all its segments
-  Encourage the consumption of fresh fruit and vegetables as part of the solution to societal concerns, given its low environmental impact and high health benefits

NORDIC COUNCIL FOR HEALTH & THE PLANET



800 gr./capita/day

WHO FOR HEALTH



400 gr./capita/day
5 portions

TODAY IN EU



351 gr./capita/day
4 portions



FOOD FOR THOUGHT

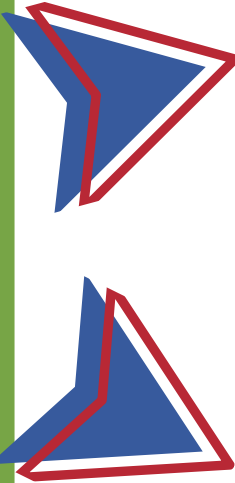


**EACH ADDITIONAL PORTION FOR ALL
EUROPEANS/DAY IS EQUAL
TO 12 MIO T FOR THE EU**

EU-ACP Trade in fresh produce at a glance



European F&V
75 Mio t production
and trade is based
on strong quality &
sustainability and
high safety assets



<div></div> <p>Primary local and seasonal sales, but strong intra EU market.</p> <p>30 mln T</p>	<div></div> <p>EU is the world largest single importer with access to 450 Mio demanding consumers.</p> <p>16 mln T</p>	<div></div> <p>Steady growth of imports in volume (3% YoY) and in value (11.13% Yoy)</p> <p>≈ 20.23bn €</p>
<div></div> <p>Trade is important to secure diversified assortment year-round. Clear rules are a must</p>	<div></div> <p>For ACP alone in 2024 2.5mln T (15%) 3.3bn € (16.5%)</p> <p>86 RASFF Alerts</p>	<div></div> <p>Fresh produce is subject to legislative & societal scrutiny. Confidence between partners is key to getting both right</p>

80%

of imported fruit and
vegetables are sold in
supermarkets, hence the
relevance of both import
market access rules and
customer requirements

Evolving in a changing world

DUAL RESPONSIBILITY

SOUND PRODUCTION & SAFE TRADE

Product traded need to be safe from a PLANT HEALTH perspective and respect EU production rules, otherwise they cannot be imported. But products imported need to be safe from a FOOD SAFETY perspective, otherwise no trust in products by the consumers.

CUSTOMER & CONSUMERS DEMANDS

Making sure that the shelves are full year-round with a wide diversity of fresh produce to satisfy customers demands and expectations.

Have answers for environmental, societal and economic demands and concerns of consumers



SUSTAINABLE DEVELOPMENT GOALS



Possible opportunity?

Rebalance the discussion between the three pillars of sustainability, particularly the economic
Create added value and incentives for producers
search for equivalence and certification
harmonisation

DUAL CHALLENGE

PRODUCING IN CHANGING WORLD

Climate change is already having a very real impact on yield, growing conditions, pests and other diseases. Adding to that geopolitical shifts that have a real impact on trade routes, creating trade diversions, and upending trade rules as we know them.

RESULTING IN EVOLVING DEMANDS

GOAL TO SPEED UP TOWARDS CLIMATE NEUTRALITY THROUGH WIDE-RANGING REGULATION: PPWR (AUGUST 2026), DEFORESTATION REGULATION (2025-2026), CSRD, CSDDD, WHILE AT THE SAME TIME CALLING FOR SIMPLIFICATION AND LESS RED TAPE (OMNIBUS REGULATIONS)

=> Lack of clarity



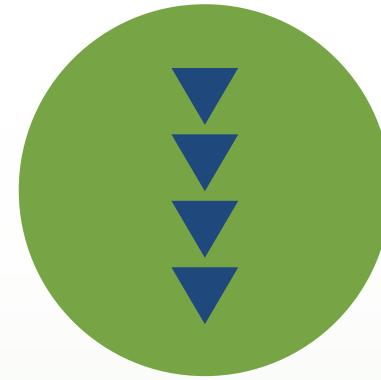
Fresh produce challenge to adapt to societal concerns and supermarket demands



Policy (in)coherence,
overlap of requirements,
no overlap of audits



Business v. NGO
approach
Overburden of
demands (MRLs,
certifications, etc.)



Top-down and bottom-up
approach balancing the 3
sustainability pillars, with
demands on regulatory
and customer sides



Administrative burden
and heavy monitoring
for accountability



Costs increase v.
Price caps: FV
perceived as
expensive products
leads to price
sensitivity on
customers' side

Multiple areas for supply chain cooperation



**Information
sharing and
transparency,
building
positive image**



**Addressing
climate change
with the right
toolbox**



**Adapting tools
to societal
expectations**



**Regulatory
compliance
and training**



**R&I – new
technology and
for toolbox**



**Reporting
(CSRD,
Envi Footprint)**



THANK YOU

Sarah Breitburd



freshfel.org



Freshfel Europe





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.