



THE FRUIT AND VEGETABLE INDUSTRY SERIES



FRUIT AND VEGETABLES SCHEME



Session n°11 Market dynamics in the F&V industry: The role of supermarkets and large retailers in shaping market trends and prices

Thursday 6 November 2025

Highlights

About the Fruit and Vegetable (F&V) Industry Series

In the context of the United Nations (UN) 2021 International Year of Fruits and Vegetables, the OECD Fruit and Vegetables Scheme of the Trade and Agriculture Directorate and COLEAD launched an online series **highlighting the significance of the F&V sector and its various dimensions**.

The objectives are to share knowledge of markets and operators working in local and export F&V markets; understand the F&V sector's contribution to sustainable production and consumption; promote the contribution of F&V to healthy and nutritious diets; and showcase the successes and innovations of private sector operators across the European Union and Southern countries, along with lessons learned.

Session 11 explored how supermarkets and big retail chains shape market dynamics, influence pricing, determine supply chain standards, and affect opportunities for producers and SMEs.

The session gathered experts from OECD and Freshfel Europe, alongside African entrepreneurs from Kenya and Ghana. It attracted great interest with 276 registrants seeking to gain insights, access valuable resources explore entrepreneurial opportunities, and engage with leading voices in the F&V industry.

All information about the session is available on [Agrinnovators](#) entrepreneur's platform.
Recording of the session: [Link](#)

Key points discussed

Retail consolidation and shifting market power

The F&V sector is increasingly shaped by a small number of large supermarkets chains whose private standards and sourcing rules now strongly influence how produce must be grown, processed, packaged, and priced. While this consolidation has improved logistics, traceability, and food safety, it also concentrates power, creating negotiation and margin pressures for SMEs and smallholders. Entering and competing in modern retail channels is becoming more challenging despite rising demand.



Funded by
the European Union

Evolving regulatory and sustainability pressures

Rules on labelling, food safety, packaging, and environmental reporting are becoming stricter, especially in the EU. These demands increase costs for suppliers, particularly African exporters. Retailers also expect better sustainability practices, which require new investments that many SMEs find difficult to afford.

Retail-driven innovation and new sourcing mode

Supermarkets are pushing new ways of working, such as year-round supply, private labels, and fast response to consumer trends. Digital tools like QR codes, blockchain, and AI help improve quality and reduce waste. But these technologies are easier for large companies to adopt than for small producers.

Opportunities and constraints for producers and SMEs

Selling to supermarkets can offer better markets and long-term contracts, but it requires strong certification, good packaging, strict hygiene, and reliable cold-chain logistics. High transport costs, frequent audits, and seasonal shortages remain key challenges. Still, SMEs that deliver consistent quality and traceability can build strong partnerships.

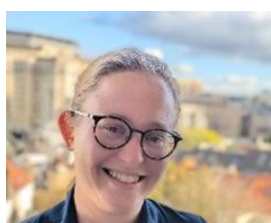
Pathways toward more inclusive and resilient market systems

A fairer system requires more cooperation along the supply chain. Clearer pricing, common standards, and long-term partnerships can reduce pressure on suppliers. Joint investments in logistics, sustainability, and digital tools also help. Governments and development partners must support SMEs to upgrade equipment, improve compliance, and access retail markets.

Meet our speakers



Celine Giner
Policy Analyst, OECD



Sarah Breitburd
Trade Policy Adviser,
Freshfel Europe



Linette Wawira
Founder Jiwa Farm,
Kenya



Eugenia Boafo
New Product
Development Lead,
HPW, Ghana

Celine Giner, Policy Analyst, OECD

Céline Giner is a Policy Analyst at the OECD, where she leads work on global food systems, including healthy diets, livelihoods, environmental sustainability, food loss and waste, and consumer behaviour. She supports governments through evidence-based analysis and international standards, and coordinates expert networks to improve the performance and resilience of food systems.

In her contribution, Céline highlighted how retail consolidation interacts with broader food-system challenges. She explained that supermarkets increasingly influence what consumers eat and how products are produced, through labelling, traceability, and sustainability requirements. She stressed that food systems face a “triple challenge”, feeding people, supporting livelihoods, and reducing environmental impacts and that retailers often act as powerful levers for change. Her key message was that well-designed policies are needed to

support healthier choices, reduce food waste, and ensure that retail-driven transformations remain fair and inclusive for all actors in the fruit and vegetable value chain.

Sarah Breitburd, Trade Policy Adviser, Freshfel Europe

Sarah Breitburd represents Freshfel Europe, the association that brings together companies and national associations across the entire European fresh produce supply chain. She monitors market access, import requirements, trade policies, and regulatory developments affecting fruit and vegetable operators, with a strong focus on competitiveness, sustainability, and consumer trends.

Sarah highlighted how market dynamics in Europe are being reshaped simultaneously by regulations and retailer-driven expectations, creating a demanding environment for suppliers. She explained that the EU, the world's largest importer of F&V relies heavily on strict plant health, food safety, and sustainability requirements. Retailers add an additional layer of private standards on pesticides, wages, seasonality, packaging, and environmental practices. This dual pressure generates high compliance costs, administrative burdens, and price sensitivity that particularly affect suppliers from ACP countries. She emphasised that operators are "pulled between two forces": regulatory obligations on one side and supermarket requirements on the other. Sarah noted that stronger information sharing and cooperation along the chain are essential to balance these demands, avoid duplication of audits, and maintain competitiveness in a context of climate change, logistics disruptions, and evolving consumer expectations.

Linette Wawira, Founder Jiwa Farm, Kenya

Linette Wawira is the founder of Jiwa Farm Export Ltd, a Kenyan agribusiness exporting fresh vegetables, beans, herbs, and specialty produce to the UK and parts of Europe. Starting as a small local grocery during the pandemic, she has grown Jiwa Farm into a GlobalG.A.P.-certified exporter with in-house farms, trained staff, and its own logistics company to support international shipments.

Linette's presentation offered a grounded view of what supermarket integration means for African SMEs. Retailers' high expectations regarding quality, consistency, traceability, and specialised packaging shape every operational decision from farm management to logistics. Meeting supermarket standards requires significant investments in certification, hygiene systems, staff training, and packaging innovation, which raise costs but remain essential for market entry. Airfreight prices are one of the strongest barriers for African exporters, forcing producers to reduce margins or risk losing buyers to cheaper origins. To stay competitive, Jiwa Farm built its own logistics service to negotiate better freight rates and ensure reliability. Linette highlighted that despite these pressures, strong compliance, attractive packaging, and trust-based relationships with buyers allow SMEs to secure long-term contracts.

Eugenia Bofo, New Product Development (NPD) Lead, HPW Ghana

Eugenia Bofo leads product development at HPW Fresh & Dry Ltd, the largest dried fruit producer in West Africa. HPW exports certified natural fruit snacks to supermarkets in Europe, the US, Australia, and the Middle East, processing 45,000 tons of fresh fruit annually and supporting more than 5,000 workers and thousands of farmers. The company is known for its strong food safety systems, full traceability, and community-oriented impact model.

Eugenia underscored the gatekeeping role of supermarkets, explaining that retail acceptance and shelf placement determine whether a product succeeds or disappears. Retailers expect year-round availability despite seasonality forcing suppliers to invest heavily in planning, cold-chain management, and traceability. She highlighted that suppliers delivering the highest social and economic impact often face the highest compliance pressure, due to costly

certifications, audits, and sustainability requirements. HPW therefore invests continuously in food safety, logistics, and ethical practices to maintain trust and avoid stock disruptions. Fair and transparent partnerships aligned standards across retailers, and joint investment in sustainability technologies are essential to ensure that African SMEs remain competitive.

Resources

1. Report and studies

EUR-Lex, 2019, Unfair trading practices in business-to-business relationships in the agricultural and food supply chain, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32019L0633>

European Parliament, 2018, The Impact of the Common Agricultural Policy on Developing Countries, [https://www.europarl.europa.eu/RegData/etudes/STUD/2018/603862/EXPO_STU\(2018\)603862_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/STUD/2018/603862/EXPO_STU(2018)603862_EN.pdf)

FAO 2022, *Retail Food Environment and Consumer Behaviour in Low- and Middle-Income Countries*, <https://www.fao.org/documents/card/en/c/cb8822en>

FAO, 2020, 7, Price Transmission and Market Power in the Agri-Food Sector. FAO Policy Brief, <https://openknowledge.fao.org/items/f7ffc439-8045-478c-983f-041bec365b97>

Food Marketing Institute (FMI), 2023, Power of Produce 2023, https://www.fmi.org/forms/uploadFiles/74DA9F0000000A.toc.Top_10.pdf

Gravert, C. et al., 2025. In-store food promotions increase sales as well as waste: evidence from vegetable purchases, <https://www.nature.com/articles/s41598-025-01800-x>

IFPRI, 2022, *Africa Agriculture Trade Monitor (AATM): Standards, Supermarkets & Cross-Border Trade*, <https://ebrary.ifpri.org/digital/collection/p15738coll2/id/135996>

Kidane, D. G. et al. (2024). Price transmission and asymmetry in a changing seafood supply chain, <https://www.tandfonline.com/doi/full/10.1080/13657305.2024.2447443>

Liu, X. et al. (2025). [Integrating Attention-Enhanced LSTM and Particle Swarm Optimization for Dynamic Pricing and Replenishment in Fresh Food Supermarkets](#)

OECD, 2021, *Concentration and Market Power in the Food Chain*, https://www.oecd.org/content/dam/oecd/en/publications/reports/2021/02/concentration-and-market-power-in-the-food-chain_aa5064d9/3151e4ca-en.pdf?utm_

OECD, 2024, *Agricultural Trade and Markets: OECD Agriculture Trade Policy Brief*, <https://www.oecd.org/content/dam/oecd/en/topics/policy-issues/agricultural-trade-and-markets/oecd-agriculture-trade-policy-brief-21022024.pdf>

Vavra, P. & Goodwin, B., 2005. *Analysis of Price Transmission Along the Food Chain*. OECD Food, Agriculture and Fisheries Papers No. 3., https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/11/analysis-of-price-transmission-along-the-food-chain_g17a173e/752335872456.pdf

World Bank, 2023, *Digital Transformation of Food Retail Systems*,
<https://documents.worldbank.org/en/publication/documents-reports/documentdetail/099350204102332863/p1800220e70df402e0a7bb05f9ceb181d05>

World Bank, 2024. [Food Systems and Climate Change: Managing Price Volatility and Supply Chain Risk](#)

2. Trainings and other opportunities

Freshfel Europe, Retail Trends & Sustainability Requirements in Fresh Produce,
<https://freshfel.org/events/>

IFPA, Fresh Produce Safety & Retail Buyer Expectations
<https://www.freshproduce.com/events/>

ITC, How to Meet Supermarket Standards, (SME Trade Academy Course),
<https://smetraininghub.intracen.org/>

COLEAD, Market Access, Certification & Retail Requirements (Training Platform),
<https://training.colead.link/>

GSI, Webinars on Traceability, QR Codes & Digital Supply Chains,
<https://www.gsl.org/events>

Coordination team for these series:

OECD: Jose Brambila-Macias, Programme Manager, Trade and Agriculture Directorate, Agricultural Codes and Schemes.

COLEAD: Ahoefa Soklou, Project Officer and Nina Desanlis-Perrin, Project Officer, Networks and Alliances Department.

<https://www.oecd.org/> | <https://colead.link/>



This event was organised 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 (EU).

This publication has been produced with the financial support of the EU and the OACPS. Its contents are the sole responsibility of COLEAD and can under no circumstances be regarded as reflecting the position of the EU or the OACPS.