

THE FRUITS AND VEGETABLES INDUSTRY SERIES

17 March 2026

**Navigating EU policies, regulations
and standards impacting fruit and
vegetable value chains**



Packaging & Environmental Sustainability Reforms: Implications for Fresh Fruit & Vegetable Trade

1

What Has Changed

Plastics · Recyclability · Labels

2

Trade Impact

By commodity, supply chain & operational

3

For Exporters

practical actions

4

For Buyers

Requirements & responsibilities

5

Key Actions

For the sector

What Has Changed – and What It Means for Fresh F&V



Plastic Reduction Measures

- Phasing out of certain single-use plastic formats for fresh produce sold in units under 1.5 kg
- Affects punnets, trays, nets, small bags, lightweight films
- A defined EU-wide exceptions list



Recyclability Requirements

- Packaging must meet minimum recyclability performance grade
- Pressure on multi-layer films and MAP structure
- Shift toward mono-material packaging



Labelling & Chemical Safety

- PFAS limits for food-contact packaging
- Compostable PLU stickers
- Harmonised EU sorting label
- Digital marking for substances of concern (methodology due by 2030)

Impact by Commodity

COMMODITY	TYPICAL PACKAGING	REFORM IMPACT
Tomatoes, Stone Fruit, Avocados	Protective plastic trays, nets, shrink-wrap	PLASTIC RESTRICTIONS
Grapes, Berries, Cherries	MAP multi-layer films, clamshells	RECYCLABILITY REQUIREMENT
Leafy Greens, Herbs, Salads	Multi-layer bags, MAP pouches	RECYCLABILITY REQUIREMENT
Citrus, Onions, Garlic	Plastic nets & mesh bags < 1.5 kg	PLASTIC RESTRICTIONS
Cut & Ready-to-Eat Produce	MAP trays, sealed punnets	BOTH APPLY
All Fresh Produce	PLU stickers · food-contact coatings	PFAS LIMITS & COMPOSTABLE PLU STICKERS



Impact by Supplier Chain Distance

Exporters rely more heavily on protective packaging to maintain quality over long shipping times.



Cost & Operational Impacts

Packaging redesign · Testing and certification · New supplier-buyer agreements



Impact on Market Access

Buyers will require recyclability docs, PFAS tests & traceability. Non-compliance risks delisting.

What Exporters Must Do

1



Understand Your Packaging Footprint

- Map all formats across every product exported to EU
- Identify plastics, multi-layer films, coatings & adhesives
- Flag formats likely to fall short under PPWR rules

2



Strengthen Compliance Documentation

- Maintain PFAS test reports and certificates
- Keep updated packaging specs and technical files
- Ensure full traceability of materials and supplier

3



Redesign High-Risk Formats Early

- Prioritise lightweight plastics & multi-layer films
- Shift toward recyclable mono-material structures
- Replace non-compostable PLU stickers

4



Engage with EU Buyers Early

- Share packaging specifications and audit results proactively
- Align on acceptable formats and transition timelines
- Discuss cost-sharing for redesign, testing & certification

What Buyers Must Do



Update Supplier Requirements

Integrate recyclability criteria

into sourcing standards & codes of conduct

Include PFAS limits & Compostable PLU sticker rules

as contractual clauses

Request full packaging documentation from suppliers

specifications, test reports, Declaration of Conformity



Support Suppliers Through Transition

Provide clear specifications & technical guidance

on acceptable formats and material alternatives

Run joint trials

for new materials or formats together



Manage Compliance Risk

Verify packaging

meets EU recyclability and labelling rules

Embed packaging compliance in contracts and onboarding

make PPWR conformity a condition

Three Key Actions

for the sector

Regulation (EU) 2025/40
PPWR ·

1



Make Packaging Visible

Full transparency on materials, structures & compliance

2



Redesign High-Risk Formats First

Lightweight plastics, multi-layer films, PLU stickers

3



Strengthen Buyer–Supplier Collaboration

Shared data, shared timelines, shared investment



THE FRUITS AND VEGETABLES INDUSTRY SERIES

Thank you



FRUIT AND VEGETABLES SCHEME



Funded by
the European Union