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THE FORUM FOR THE FRESH PRODUCE INDUSTRY

Activity Report
May 2009 - April 2010

This Activity Report provides an overview of Freshfel's work over the past 12 months, covering the period from May 2009 until April 2010.

This work would not have been possible without the active support and input from our members - Thank you!



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THE FORUM FOR THE FRESH PRODUCE INDUSTRY

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FOREWORD BY THE PRESIDENT

I welcome you to this annual review of the activities of Freshfel Europe!

As you will see from this Report, the role of the association has never been as important as in the past months during which our sector has been operating in troubled water. Our industry has indeed unfortunately not been excluded from the severe consequences of the global economic, financial and employment crises, which have been seriously affecting the EU-27 member States.

The “laissez faire” policy of the past has suddenly shown its weaknesses. Authorities are now taking corrective actions to safeguard the functioning of the banking system, to regulate financial markets and exchange rates, and to introduce new budgetary discipline which might impact on the public support currently granted to agriculture, health or research. Closer to us, authorities are also looking at actions that could be taken to move towards a better functioning of the food supply chain.

As the Euro is coming under pressure, adjustment measures are being planned across Europe to control Member State deficits and to restore confidence in the European currency. While a weaker Euro temporarily improves the competitiveness of our exports on the world market, the plan to remedy the national deficits will probably come with painful measures which might further impact on the purchasing power of consumers.

This complex social and economic environment is coming upon the confirmation from the latest edition of Freshfel's Consumption Monitor that fresh produce consumption across Europe continues to be at best stagnating and in many cases shows dangerous declining trends. Today, regrettably, we must note that citizens of 15 Member States out of the 27 are not eating on average the minimum 400 grams per day recommended by the World Health Organisation.



The above situation is reinforcing my belief that our association needs to be increasingly proactive in communication and enhancing the image of fresh fruit and vegetables. In the past years, fresh fruit and vegetables have often been depicted as being expensive, as being unsafe given the presence of pesticide residues or as having lost nutritional value. Not only are these

statements incorrect and need to be rectified, but they should also be counteracted by an increased support from public authorities to better communicate on the health assets of fresh produce. Besides this, in a time when the climate change debate is at the top of the European and international agenda, the positive contribution of our products compared to other food items should also be highlighted. Indeed, fresh produce is comparatively a low water user and low CO2 contributor. One should also demystify the perception that fruit and vegetables are “travelling” too much as indeed the bulk of consumption across Europe is local. Looking internally within the EU, 62% of fruit production is consumed or processed in the Member State where it was grown, while 78% of vegetable production is consumed or processed locally. The intra-community trade and imports complement this local sourcing. In regard to third country imports, fresh fruit imports into the EU represent up to 12% of consumption, but over half of these imports refer to exotic produce not grown in any great quantity in the EU. In regard to vegetables, only 2% of the EU consumer assortment is imported.

The association, together with the national associations, has a responsibility to provide the most favourable environment for its operators and to secure a regulatory framework that reflects the need and expectation of the sector. In the past 12 months, Freshfel has been looking at a wide range of issues ranging from quality, to sustainability, nutrition, health claims, trade concerns, methods of production, promotion policy and the School

Fruit Scheme as well as looking at new market segments, such as the foodservices area.

Many dossiers are ongoing and will continue to be on the association's agenda. Most of these topics represent challenges for our companies individually but in many respects these issues can be better tackled collectively by Freshfel. I greatly appreciate in this respect the good triangular cooperation between the individual companies, the national associations and the European umbrella association. I also welcome the spirit of cooperation among the membership regardless of their representation of a particular market segment.

I am standing for a second term as President of Freshfel. Together with my other colleagues on the Board, we will make sure that Freshfel is focusing on the right priorities. In today's difficult economic background, it is important that we identify the tools that can help us to boost fresh produce sales to consumers and to provide in the years to come a positive environment for the companies operating in our sector.

As I already mentioned last year, the success of Freshfel's actions in such a diversified and ever more technical range of topics can only be the result of the work of many members willing to cooperate amongst themselves

and with the secretariat. This cooperation serves for the benefit and wealth of the fruit and vegetables sector. Consequently, Freshfel's achievements do not only reflect the hard work of the Freshfel Board and of Freshfel's dedicated secretariat, but also - and primarily - the positive daily spirit of cooperation among all of Freshfel's members and associated members.

Freshfel constitutes today a very representative and strong platform of more than 200 companies and associations with an interest in the European fruit and vegetables supply chain. Its membership continues to diversify and ranges from producer groups to exporters and importers as well as wholesalers, distributors and retailers. Despite the difficult economic environment, Freshfel membership has remained steady, representing for me a testimony to the valuable work undertaken by our association for the benefit of the fruit and vegetables sector at large.

Many thanks to all of the members and associated members for their support and commitment to the activities of Freshfel Europe!

Ramon Rey
ARC Eurobanan / Total Produce
President Freshfel Europe



GOVERNANCE

FRESHFEL EUROPE

Freshfel Europe, the European Fresh Produce Association, is the forum for the fresh fruit and vegetables supply chain in Europe and beyond. Its members and associated members are associations and companies that have an interest in the European fresh fruit and vegetable sector, including production, trade, logistics and retailing. Freshfel is a non-profit association under the Belgian legislation of 1918. The seat of the association is located in Brussels - the headquarters of the European Union. Freshfel Europe is registered in the EU register of interest representatives, a European Commission initiative to increase transparency within the European environment. The Freshfel register n° is 1637225479-02.

MISSION

Freshfel is a member-driven association, undertaking multiple representation and coordination of tasks for the overall benefit of the fresh produce sector. Freshfel defends the interests of the sector on the European and international scene, and updates members on recent legislative and supply chain developments. Freshfel provides a networking platform for its members and facilitate contacts among representatives of the sector. Within Freshfel, the sector has a forum to meet, to share views and to gear positions towards one another.

Freshfel's mission aims to:

- improve the efficiency and competitiveness of the sector
- facilitate international fresh produce trade
- assist members to comply with the highest safety rules and move the sector towards a sustainable development
- secure a favourable environment to promote the benefits of fresh produce
- position the sector in the new research and innovation policy
- improve the communication of the sector
- stimulate the consumption of fresh fruit and vegetables



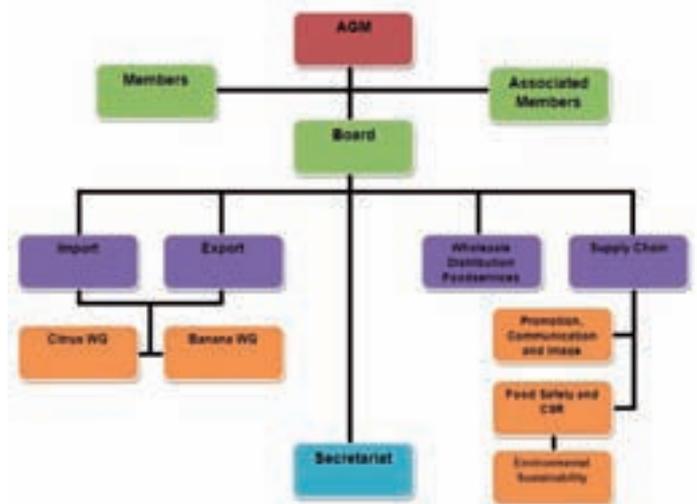
FRESHFEL STRUCTURE AND BOARD



Freshfel Europe is structured around a Board and four main Divisions. Freshfel's work is also further developed through a series of working groups with a dedicated mission such as food safety and sustainability, promotion and communication and product groups such as citrus and bananas. In recent months and given the technicality of many dossiers a more important part of the work was conducted in

dedicated working groups looking at issues of food safety, food quality, sustainability, promotion, claims, etc. The success of the citrus working group and the dismantling of the European Community Banana Trade Association (ECBTA) also let the board to suggest the launch in 2010 of a new working group for bananas.

Freshfel organises its work in a flexible manner according to the evolving needs of its Members and to better respond to these emerging expectations. Given its international operating environment, Freshfel holds physical meetings when appropriate and feasible, and also holds various teleconferences on matters of immediate concern in order to approximate positions amongst the membership. A great deal of the coordination is also structured around the Freshfel weekly Newsletter, the principal liaison tool with the members for building common positions.



The Board consists of the association's President, Vice-President and the Treasurer, as well as the Chairmen and

the two Vice-Chairmen of each of the four Divisions (Import, Export, Wholesale and Distribution and Supply Chain). The Board also includes the Chairmen and Vice-Chairmen of the Working Group on Promotion, Communication

and Image, the Working Group on Food Quality and Sustainability as well as the Citrus Working Group and the newly created Banana Working Group. All Board members are elected for a mandate period of two years.

The Board is due to be renewed at the 2010 AGM which will take place in Brussels on 3 June 2010. The Board elected in 2008 in Antwerp (Belgium) served and steered the activities of the Association throughout the 2008/2010 term. A new Board is being proposed

At the end of the 2008-2010 term, Mr Ronan Raes, Treasurer, Mr Jacques Azoulay, Chairman of the Import Division, Mr Svend Aage Kristensen, President of the Supply Chain Division and Mr Laurence Swan, Chairman of the Working Group on Promotion, Communication and Image are not seeking re-election

to the Board. All of them have widely contributed in their respective responsibilities to the good governance and management of the association. They should be thanked for their leadership, time and dedication for the benefit of the general interest of the association and the sector.

Besides the Board assignments which are ad personam, Freshfel operates in an open manner, inviting all its members and associated members to attend the meetings organised by the association such as the Annual General Meeting, the division meetings, the working groups and teleconferences.

FRESHFEL BOARD 2010-2012 (as proposed to 2010 AGM)

Presidency	President	Ramón Rey	ARC Eurobanan - Total produce
	Vice - President	Philippe Henri	Creno - UNCGFL
	Treasurer	Jérôme Fabre	Compagnie Fruitière
Import Division	Chairman	Marc De Naeyer	Trofi bv
	Vice Chairman	Herbert Scholdei	Kolla Hamburg Overseas Import GmbH
	Vice Chairman	Willem Baljeu	Frugi Venta
Export Division	Chairman	Daniel Corbel	Cardell - Aneefel
	Vice Chairman	Paco Borrás	Anecoop
	Vice Chairman	Michelangelo Rivoira	Rivoira Giovanni E Figli - Fruitimprese
Wholesale, Distribution and Foodservices Division	Chairman	Henri Lambriex	Greencell Ltd
	Vice Chairman	Nigel Jenney	Fresh Produce Consortium
	Vice Chairman	Vincent Holveck	Pomona TerreAzur
Supply Chain Division	Chairman	Francisco Contreras	Edeka Fruchtkontor
	Vice Chairman	Jack Enevoldsen	Coop Trading A/S
	Vice Chairman	Hein Deprez	Univeg Group
Promotion, Image and Communication Committee	Chairman	Luc Clerx	Zespri International (Europe) nv
	Vice Chairman	Vincent Dolan	Total Produce plc
Food Quality and Sustainability Committee	Chairman	Andreas Brügger	Deutscher Fruchthandelsverband
	Vice Chairman	Axel Moerkhe	Dole Europe Import bvba
Citrus Committee	Chairman	Jose Antonio Garcia Fernandez	Ailimpo
	Vice Chairman	Salvo Laudani	Oranfrizer - Fruitimprese
Banana Committee	Chairman	Antonio Orsero	GF Group
	Vice Chairman	Ann Duffy	Fyffes Plc



FRESHFEL SECRETARIAT

The daily work of Freshfel Europe is conducted by the secretariat of the association based in Brussels. The secretariat acts as a team, and the five staff representatives coordinate the activities of the association covering a wide range of skills.

- ✓ **Philippe Binard** is the General Delegate of the association. He coordinates the overall activities of the secretariat and management of the association. He is responsible to the Board for the good functioning of the association. He is also responsible for the representation of the association in different forums such as the European Commission Advisory Groups and in the relationships with other organisations such as COPA COGECA, AREFLH, PROFEL, FRUCOM, CELCAA, GLOBALGAP, etc. He is also involved in the other Associations hosted by Freshfel, namely WAPA, SHAFFE and Europatat.
- ✓ **Raquel Izquierdo de Santiago** is the Food Policy Advisor following among other issues health and nutrition policy, promotion policy and the European School Fruit Scheme. Raquel is also coordinating the Freshfel Consumption Monitor and the other Freshfel commitments in the EU Platform for Diet, Physical Activities and Health. Finally Raquel is also involved at the secretariat level in the activities of WAPA, the World Apple and Pear Association.
- ✓ **Frederic Rosseneu** is the Food Quality and Sustainability Advisor, following in particular the EU legislation on safety and quality as well as environmental and research policy. Frederic is also an expert on the Common Market Organisation and other Common Agricultural Policy developments. Frederic is finally involved at the secretariat level in the activities of Europatat, the European Union of the Potato Trade, which recently signed a cooperation agreement with Freshfel for shared secretariat arrangements.
- ✓ **Simon Pettinger** is the Trade Policy Advisor. Simon follows in particular the bilateral and multilateral trade negotiations of the EU. Simon also monitors statistics on trade development, licences and quotas, and contributes to the coordination of the citrus networking between Freshfel and SHAFFE. Simon also follows customs policy and other market access issues. Within the secretariat, Simon is following the activities of SHAFFE, the Southern Hemisphere Association of Fresh Fruit Exporters.
- ✓ **Sebastian Kruse** is the Communication and Industry Policy Advisor. Sebastian joined Freshfel in July 2009 and has successfully taken up the coordination of Freshfel's communication policy, not only revamping the internal communication policy with the members but also enhancing the external communication with third parties, while launching a new social media policy. Sebastian also coordinates the weekly newsletters and press reviews published by Freshfel Europe as well as the elaboration of communication dossiers on important issues for the sector. Sebastian also takes care of policy dossiers such as organic production and is supporting the work of the wholesale and food services division



FRESHFEL MEMBERSHIP & BENEFITS

With its evolving membership across the supply chain, Freshfel Europe is becoming a vertically integrated association incorporating around 200 companies and national associations of producers, importers, exporters, distributors, wholesalers, retailers and their service providers, both within the EU and in countries with an interest in the European fruit and vegetables market. The complete list of members and associated members is to be found at the end of this report. Freshfel revenue and operational resources are exclusively coming from membership fees.

In 2009/2010, Freshfel membership continued to evolve with new members and associated members joining the association. Freshfel was pleased to welcome Agro Alians (Poland), Be Fresh (Belgium), Cooperative Telersvereniging Prominent (The Netherlands), Origin Fruit Direct (The Netherlands), Vegdis (Poland) and Zenalco (Spain). Freshfel also reinforced its cooperation with Interfel and Fytolab (Belgium). A cross membership agreement is also in place with the US organisation PMA.

The membership of Freshfel Europe is today well balanced between its various membership categories and members' focus. This guarantees a good balance of interest and a wide diversity of experience available to the association. In recent times, Freshfel is looking to reinforce its representation and cooperation with companies and associations based in the Eastern part of the European Union in order to better reflect the reality of the fruit and vegetables sector in the EU-27.

Besides granting to the association the strengths of their support and their professional input, Freshfel's members benefit from a wide range of services and advantages. These benefits enable them to get a better grasp on the many challenges that face today's fruit and vegetables sector. Amongst others, members benefit from:

- ✓ the ability to exchange views and develop common positions with colleagues engaged in similar activities
- ✓ the ability to influence the European decision-making process and to attend a number of consultative and advisory meetings, mainly with the European Commission and European Parliament
- ✓ the networking opportunities offered by an association with an international dimension
- ✓ the ability to strengthen the fruit and vegetables sector on the international trade scene and vis-à-vis competing sectors
- ✓ the ability to obtain support in accessing and understanding EU legislation
- ✓ preferential access to a number of meetings, conferences and congresses
- ✓ immediate access to regular information regarding legislative and sector developments
- ✓ the access to key statistical data about production, trade and consumption developments and trends
- ✓ the services of a multilingual Brussels-based secretariat for answers to questions relating to the fruit and vegetables supply chain

Not yet a member of Freshfel Europe?

Please contact Philippe Binard at the Freshfel secretariat: info@freshfel.org

Freshfel resources are exclusively resulting from membership fees. A strong organisation can only be built by gaining the support of all the stakeholders in the fresh produce supply chain. Freshfel Europe thanks its members and associated members for their support!





TRANSPARENCY AND COMMUNICATION

PUBLICATIONS

Information flow is a key for building policy positions, for networking and for accountability. Freshfel Europe has therefore developed several tools to communicate on a regular basis with its members and the outside world in the most efficient manner:

- ✓ The *Freshfel Newsletter*, disseminated to members on a weekly basis each Friday, includes the latest information on crucial legislation and important developments within the fruit and vegetables sector. It also informs members on actions undertaken by the Association. The format of the Newsletter was reviewed in January 2010.
- ✓ The weekly *Freshfel Press Review* published each Monday features summaries of international press articles that are of interest to the fresh produce business. The format of the Press Review was also reviewed in January 2010.
- ✓ Freshfel has also introduced *Thematic Fact Sheets* for its members on a series of topics, which are published given a specific event or development. These are compilations of available information in an FAQ-style on key issues, such as climate change, pesticides, consumer attitudes and obesity, as well as on statistics such as trade trends and production figures. They aim to improve the communication and reasoned information available within short notice and to harmonise the industry message on certain topics.
- ✓ Every two months, Freshfel also issues a *Fresh Times*, summing up latest best practices and other initiatives undertaken to stimulate the consumption of fresh fruit and vegetables. Freshfel is currently actively re-evaluating its communication policy to further improve the quality of the information and to make sure that in an information-saturated environment, the relevant messages are reaching the appropriate people. The Fresh Times publication is disseminated to around 1.000 contacts within Europe and beyond.
- ✓ In 2009, Freshfel also resumed the publication of *Freshfel Headlines* on a bi-monthly basis to outline key activities and positions to the public and private sector. The Headlines are disseminated to around 1.000 contacts within Europe and beyond.
- ✓ Throughout the year, Freshfel also issues a large number of *Press Releases* to communicate its positions. They include for example the communication on policy issues (trade, promotion, climate change, etc.), Freshfel's activities (Working Groups, conferences, presentations, etc.) and statistics (trade and production). They also aim to create more visibility and acceptance for the association and the whole fresh produce business as well as their respective viewpoints. So far, Freshfel's statements have received a very good coverage by the specialised press and also some coverage by the national press in various countries.



WEBSITE AND SOCIAL MEDIA

Internet, media and social networking are also on the Freshfel agenda to facilitate communication and increase the transparency of activities. The main developments during the last year in this respect have been as follows:

- ✓ The association's official website is accessible at www.freshfel.org. In 2010, the Freshfel website was completely revamped. It is linked to an Extranet for improved communication with the members. While in July 2009 Freshfel's website was visited by around 5.000 people, now (April 2010) the Freshfel website is visited by around 8.000 people per month. This revamping process also included a repositioning of Freshfel in web search engines, which has led to more visitors to the website through search engines such as Google or Yahoo.
- ✓ Members have now also access to a newly *created Freshfel Extranet*, which contains all Freshfel publications. The extranet is a unique archive of documents, including meeting reports, newsletters, position papers, presentations, etc.
- ✓ Freshfel also runs the on-line Fresh Quality Guide accessible at www.freshquality.org. Launched in February 2004, this website constitutes a unique compendium of all EU food quality and safety legislation applicable to fruits and vegetables, and interpretative guides thereof. In May 2010 the website reached the threshold of 200,000 visits since it was launched. It also has more than 14.000 returning visitors.
- ✓ To adapt to social media developments, Freshfel now has its own *Facebook*-page. This will be used as a tool to stay in touch with stakeholders, policy and decision makers and, more generally, to connect Freshfel with people interested in the sector and the work Freshfel is doing. The facebook page is accessible at www.facebook.com/pages/Freshfel-Europe/113012748281
- ✓ The Secretariat has also created a *Wikipedia*-page for Freshfel, which gives the most important information about the association at a glance.
- ✓ Finally, a *RSS-feed* on the Freshfel website keeps subscribers updated on all public communications published by Freshfel.



VISIBILITY

To increase Freshfel's visibility, Freshfel once again had a booth at this year's Fruit Logistica fresh produce trade show to present the work of the association and multiply contacts with the sector. The stand was well visited over the three days of the exhibition, and the experience will be repeated in February 2011.



NETWORKING

REPRESENTING THE SECTOR



on the Food Chain and Animal and Plant Health. In regard to **DG TRADE**, Freshfel regularly attends the Civil Society Dialogue meetings on trade issues and the Market Access Working Group on Sanitary and Phytosanitary Issues. Freshfel is also linked to the **EFSA Stakeholders Platform** in Parma. In so far as the **European Parliament** is concerned, Freshfel regularly attends Committee meetings of the European Parliament (Committee on Agriculture, Committee on International Trade, and Committee on Environment, Health and Consumer Protection). Freshfel, along with AREFLH, supports the work of the **European Parliament's Intergroup** on Fruits and Vegetables. Besides this, Freshfel is also accredited with the United Nations organisations such as FAO, WHO, UN/ECE and OECD.

Freshfel Europe regularly cooperates with the European Commission and other EU institutions as the European representative organisation for the fresh produce trade. The Freshfel secretariat and members participate on a regular basis in EU Advisory Groups and EU Expert Committees whose work touches upon the fruit and vegetables sector. Committees of **DG AGRI** include the Advisory Committee on Fruits and Vegetables, the Expert Working Groups on Citrus, Apples and Pears, Tomatoes, and Peaches and Nectarines, the Advisory Groups on Promotion, on Organic Farming and on the Quality of Agricultural Production. Freshfel is also represented in the work of **DG SANCO** in particular in the EU Platform for Action on Diet, Physical Activity and Health, as well as the Advisory Group



In the last twelve months, Freshfel was present at the following official advisory bodies of the EU/ international community:

- DG SANCO – European Platform for Diet, Physical Activity and Health, including a symposium on health at the workplace
- DG SANCO – Advisory Committee of the Food Chain
- DG SANCO WG on Private Standards
- DG SANCO Stakeholders Consultation on Plant Health Reform
- DG SANCO WG on Competitiveness of Supply Chain and Food Standards
- DG SANCO Conference on Data Strategy and Stakeholder Partnership
- DG SANCO Conference on 30 Years of the Rapid Alert System for Food and Feed
- DG TRADE - Market Access Working Group on Sanitary and Phytosanitary Issues
- DG AGRI - Advisory Committee on CAP Simplification
- DG AGRI - Advisory Committee on Fruit and Vegetables
- DG AGRI - Advisory Committee on Organic Farming
- DG AGRI – Advisory Committee on Promotion
- DG AGRI – Advisory Committee on Quality of Agricultural Production
- DG AGRI - Ad Hoc Advisory Committee on the European School Fruit Scheme
- DG AGRI - Experts WG on Tomatoes
- DG AGRI – Experts WG on Apples and Pears
- DG AGRI - Experts WG on Peaches and Nectarines
- DG AGRI - Experts WG on Citrus
- DG ENVI – Consultation on IPM
- DG ENVI – Retailer Forum
- EFSA – Stakeholders Platform
- European Parliament Intergroup on Fruit and Vegetables



Since February 2009, upon proposal of Freshfel, Pino Calcagni was elected chairman of the EU Advisory Committee for Fruit and Vegetables. This committee is a liaison committee between the European Commission and the representative organisations of the sector, namely COPA-COGECA (producers), Freshfel Europe (fresh f&v), Frucom (dried f&v), PROFEL (processed f&v), BEUC (consumers) and EEB (NGO for the environment). Besides reviewing and monitoring policy developments relevant for fruit and vegetables, one of the main issues for discussion in 2010 is the elaboration of a resolution on the state of play of the fruit and vegetable sector for the new European Commissioner in charge of Agriculture and Rural Development, Mr Dacian Ciolos.



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Besides the official representation of the sector in public forums, Freshfel also represented the voice of the sector or reported the activities/position of the association in several meetings, specifically:

- ✓ American Chemical Society (ACS) conference – MRL section (USA)
- ✓ AECOC (ES)
- ✓ ANEEFEL AGM(FR)
- ✓ AREFLH AGM (IT)
- ✓ Catalonia Qualitat meetings on apples and peaches & nectarines(ES)
- ✓ CELCAA meetings (BE)
- ✓ Climate Smart Food conference (SE)
- ✓ DFHV AGM (DE)
- ✓ EGEA Conference (BE)
- ✓ EISA Symposium on Integrated Production (AT)
- ✓ Ethylene Task Force (BE)
- ✓ Eurocommerce committees (BE)
- ✓ FeL Partenariat – Launch Event (FR)
- ✓ Food Chain Round Table on Pesticides (BE)
- ✓ Food Sustainable Consumption and Production Round Table (BE)
- ✓ Forum Vegetable (FR)
- ✓ Fresh 2009 (BE) and Fresh 2010 (RU)
- ✓ Fresh Antalya (TR)
- ✓ Frugi Venta AGM (NL)
- ✓ Fruit Logistica (DE)
- ✓ Fytolab Annual Symposium (BE)
- ✓ GlobalGAP Tour (GR)
- ✓ GlobalGAP Crop Protection Working Groups (BE)
- ✓ International Federation of Produce Standards (ES)
- ✓ Interfel (FR)
- ✓ Interpera (BE)
- ✓ Macfrut (IT)
- ✓ OECD Plenary Meeting on the Fruit and Vegetables Scheme (FR)
- ✓ PAN Europe – Integrated Production (FR)
- ✓ PMA (USA)
- ✓ PROFEL (BE)
- ✓ Prognosfruit (NL)
- ✓ Progreens (SE)
- ✓ Spanish Association of University Agronomists (ES)
- ✓ Specialty Crops and Minor Uses Conference (BE)
- ✓ VCBT Seminar on Tomato Segmentation (BE)
- ✓ UIB Seminar on Pesticide Residue Requirements (TR)
- ✓ UNCGFL AGM (ES)
- ✓ USAID Serbian Fruit Symposium (SR)
- ✓ California Specialty Crops Council – MRL Workshop (USA)
- ✓ World Food Moscow (RU)



CONNECTING THE SECTOR



Freshfel is also a unique place for professional networking. Freshfel meetings are continuously well attended, in particular the Annual General Meeting but also the well established Trade Division meeting in Berlin on the eve of Fruit Logistica. These meetings attract close to 50 delegates each. Besides this, throughout the year Freshfel holds regular meetings for

its members to discuss matters of common concern and to set the Freshfel policies and positions.

Together with Eurofruit magazine, Freshfel has also been since 2003 the organiser of Fresh, the leading conference for the fresh produce sector. In 2009, Fresh was organised in Valencia. The conference looked more into details of innovations in the sector from a product perspective with research being undertaken by seed companies and other researchers looking at new varieties to give greater consumer satisfaction. The conference looked at innovation tools in terms of communication with customers and consumers as well as information technologies and the opportunities or challenges for the sector to adjust to this technology shift. Close to 250 delegates participated in this event.

In 2010 the "innovation" was on the location of the event as Fresh went for the first time to Russia. The event was a great success, not only given the interesting conference format but also for the large attendance in particular from the leading Russian companies, which included the major Russian supermarkets.



SECTOR DEVELOPMENTS

Fruit and vegetables are high-value crops with a wide diversity in species grown in relatively small production areas. Fruit and vegetables represent 3% of the EU's cultivated area but account for 17% of the value of the EU's agricultural production. The total production value is estimated to be more than 50 billion €. The fruit and vegetables supply chain has an estimated turnover of more than 120 billion € with approximately 550.000 employees and 1,4 million farm holdings. A large part of the production is consumed locally in the Member State where it has been grown, while consumer choice is being further complemented by fruit and vegetables coming from the other Member States. Around 26 million T are traded among Member States on a yearly basis while the EU also imports more than 12 million T of fresh produce from third countries, making the EU the world's largest importing region - while exporting more than 4.4 million T to third countries.

PRODUCTION TRENDS

Based on 2008 data, European fresh fruit production is slightly below 40 million T. The apples and pears category represents 34% of the production, citrus almost 20%, stonefruits around 18% and table grapes around 6%. Fruit production has been stable over the last few years but remains variable given climatic conditions. Italy and Spain are the leading producing

countries, each representing close to 25% of the production. European vegetable production has declined to reach around 51 million T, tomatoes being the largest product with 27% of the volume followed by cabbages and cauliflowers which both represent 14%. The main vegetable producing countries include Italy, Spain, France and Poland.

A BETTER FUNCTIONING OF THE SUPPLY CHAIN

Freshfel Europe is closely monitoring the discussions at European level on the better functioning of the supply chain. Several initiatives are being undertaken at EU level, including:

- ✓ The recommendations of the High level Group on the Competitiveness of the Agro Food Industry
- ✓ The Commission Communication for a better functioning of the food supply chain in Europe
- ✓ The European Parliament report on fair revenues for farmers for a better functioning of the food supply chain
- ✓ The Commission working document on comparing production costs structures in the EU and third countries
- ✓ The Commission consultation on the impact of safety standards and the certification on competitiveness
- ✓ The Commission consultation on a horizontal co-operation agreement

Given these developments and the complex sector situation, Freshfel has coordinated an evaluation of the sector with other associations from the fruit and vegetable sector in the framework of the Advisory Committee for Fruit and Vegetables. A joint stakeholder resolution is being prepared to raise the attention of the EU Agriculture Commissioner Dacian Cioloș. Furthermore, the Freshfel AGM 2010 will focus its discussion on this particular

matter. Finally, Freshfel, together with AREFLH, is advocating for increased transparency in the market through the setting up of an observatory. In the meantime, Freshfel is continuing its efforts for increased transparency of sector trends by providing aggregate information of production and trade trends.



INTRA-EUROPEAN TRADE TRENDS

While a significant part (71,5%) of production is marketed or processed on the local market of the Member State where the product has been grown, consumer choice is complemented by fresh fruit and vegetables originating from the other Member States. The intra-EU trade of fruit and vegetables

represents around 26 million T of produce being exchanged every year between Member States out of a total production of 91 million T. Germany is the single largest receiver of intra-EU produce with 6,6 million T, despite imported volumes declining over the last 5 years.

Source: Eurostat	Intra EU F&V Trade - Volume (tonnes)			Intra EU F&V Trade - Value (Euros)		
	2007	2008	2009	2007	2008	2009
Austria	731.644	797.839	754.619	676.350.620	765.393.305	749.785.663
Belgium	1.523.932	1.602.508	1.561.553	1.114.335.675	1.179.796.734	1.115.339.696
Bulgaria	92.466	78.104	97.456	32.470.891	35.212.361	38.581.702
Cyprus	21.223	25.837	30.498	24.951.098	31.181.660	33.529.287
Czech Rep	985.767	1.002.308	1.019.956	601.597.758	674.955.616	619.502.277
Germany	6.913.756	6.956.556	6.616.266	6.551.383.980	6.803.867.877	6.147.928.185
Denmark	636.439	647.707	670.514	637.740.385	673.169.278	671.551.258
Estonia	97.598	100.165	105.230	77.168.660	82.027.600	72.142.204
Spain	921.692	917.188	929.946	564.155.163	635.308.767	565.645.892
Finland	330.398	315.767	319.252	356.686.622	369.621.093	359.192.802
France	3.285.290	3.367.183	3.394.889	2.793.665.222	3.000.456.492	2.810.976.235
United Kingdom	2.966.548	2.889.000	2.643.062	3.366.020.391	3.194.693.668	2.712.295.759
Greece	163.455	187.875	173.048	149.286.824	185.416.036	161.771.008
Hungary	287.332	313.996	256.704	184.128.756	213.204.306	163.613.849
Ireland	326.595	335.009	336.051	352.531.868	362.364.151	359.981.883
Italy	1.030.805	1.127.279	1.359.188	971.770.621	1.047.605.243	1.164.263.358
Lithuania	416.457	587.388	407.515	250.236.871	445.098.323	317.654.429
Luxembourg	53.797	55.855	51.037	95.673.228	99.794.137	95.633.689
Latvia	145.738	145.393	127.951	110.689.805	118.034.784	88.269.667
Malta	23.509	24.093	17.748	20.628.400	23.547.176	18.677.211
Netherlands	1.885.868	1.771.517	1.748.353	1.537.427.014	1.506.410.201	1.389.271.150
Poland	1.400.226	1.452.280	1.282.144	919.730.354	1.078.411.097	857.714.767
Portugal	535.455	481.573	503.566	347.248.670	347.959.127	314.704.071
Romania	236.459	252.605	210.327	144.602.403	165.303.507	125.429.691
Sweden	785.368	781.630	743.680	832.693.937	808.013.488	701.728.983
Slovenia	164.833	189.666	186.302	133.973.103	161.203.254	146.377.005
Slovakia	404.913	425.817	814.565	250.771.504	286.618.388	287.656.819
Total	26.367.560	26.832.137	26.361.420	23.097.919.823	24.294.667.669	22.089.218.540



IMPORT & EXPORT TRENDS

For the first time in the decade, the import from third countries into the EU declined in 2009. Total fruit imports in 2009 represented 11,1 million T worth 8,8 billion €, while vegetable imports represented 1,8 million T worth 1,7 billion €. Bananas are the largest fruit category imported

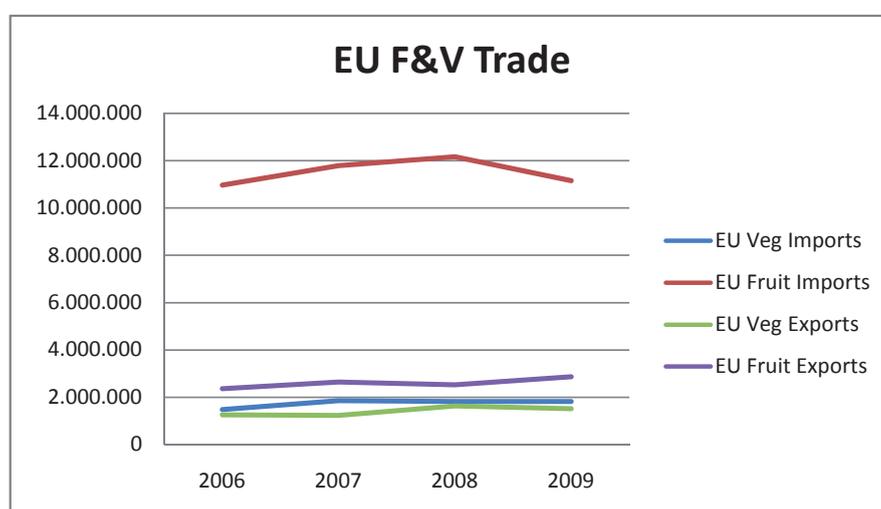
into the EU with 4,5 million T, followed by pineapples (880.000 T), oranges (840.000 T) and apples (700.000 T).

Exports remained steady in 2009 mainly due to the strong demand from the Russian market. Apples originating in Poland were

the main factor influencing this trend, while other products and Member States were facing difficulties due to the strength of the Euro. Exports amounted in 2009 to 4,4 million T worth 3 billion €. The main exported categories included apples (1,4 million T) and citrus (600.000 T).

Source: Eurostat	EU-27 Imports by Volume (tonnes)				EU-27 Exports by Volume (tonnes)			
	2006	2007	2008	2009	2006	2007	2008	2009
Tomatoes	355.130	471.232	473.248	524.276	148.400	177.103	222.099	167.267
Onions & Garlic	388.924	546.869	478.444	367.112	567.180	440.864	616.629	716.988
Cabbages & Cauliflowers	22.204	46.164	31.633	38.285	105.704	151.306	221.094	143.842
Lettuce & Chicory	13.572	15.961	18.185	13.931	61.801	63.481	68.587	67.593
Carrots & Turnips	49.045	58.269	64.853	114.862	94.496	102.807	170.845	89.186
Cucumbers & Gherkins	32.494	34.268	36.171	44.268	44.386	43.047	48.152	38.476
Legumes	210.208	221.269	227.646	211.847	15.657	23.522	21.663	7.678
Other Vegetables	408.090	458.074	485.518	504.978	218.440	232.790	265.022	284.527
Total	1.479.669	1.852.107	1.815.698	1.819.559	1.256.064	1.234.919	1.634.091	1.515.556

Source: Eurostat	EU-27 Imports by Volume (tonnes)				EU-27 Exports by Volume (tonnes)			
	2006	2007	2008	2009	2006	2007	2008	2009
Bananas	4.450.458	4.762.166	4.958.858	4.592.299	9.497	10.304	11.191	9.005
Exotics	1.270.010	1.339.575	1.441.809	1.379.922	63.849	76.750	91.642	80.616
Citrus	2.044.874	2.198.495	2.345.589	2.040.259	551.356	676.758	580.608	609.404
Grapes	943.196	958.290	990.253	938.522	142.152	145.876	164.598	131.997
Melons & Papayas	540.699	585.981	612.022	534.854	67.076	66.833	71.428	77.788
Apples & Pears	1.157.314	1.319.131	1.174.605	1.077.941	1.109.023	1.204.525	1.121.018	1.407.528
Stone Fruit	170.398	197.778	180.247	172.946	238.232	258.137	282.129	306.179
Berries	384.015	422.261	460.400	416.263	179.115	198.722	199.148	239.012
Total	10.960.962	11.783.676	12.163.783	11.153.007	2.360.299	2.637.904	2.521.762	2.861.529



CONSUMPTION TRENDS

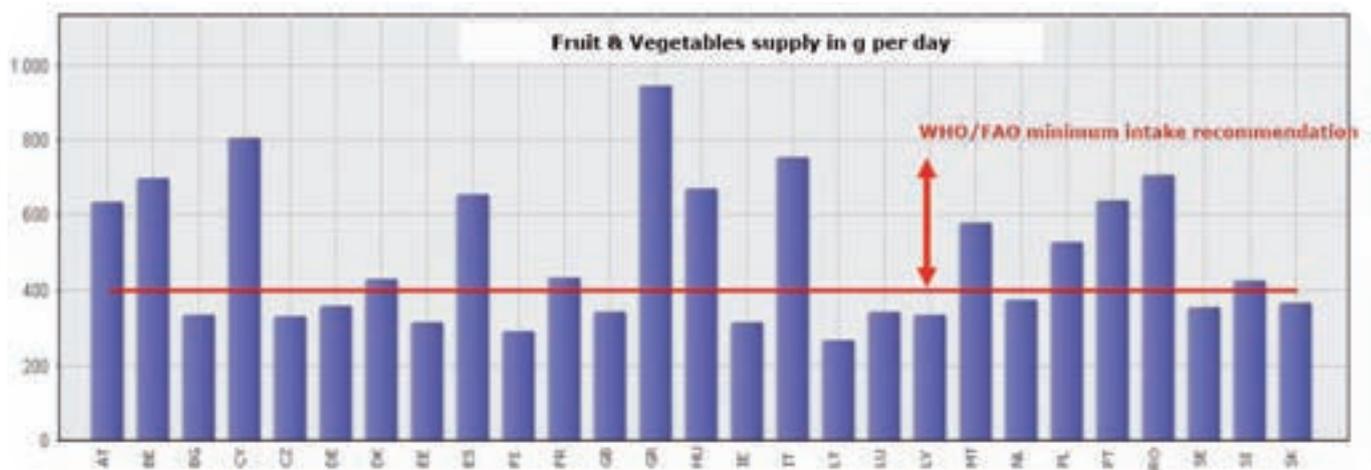
This year Freshfel Europe released a PDF and a CD-version of its 'Consumption Monitor'. The Monitor is now a well-established tool for the industry, analysing the latest trends in the production, trade and supply of fresh fruit and vegetables across the EU-27. Findings from the Consumption Monitor show that in 2008, total gross supply of fruit per capita stands on a yearly basis at 95,5 kg (compared to an average of 96,2 kg over the previous five years), while the total yearly gross supply of vegetables per capita stands at 103,5 kg (compared to an average of 120,7 kg over the previous five years). This represents a decrease of gross supply in 2008 of 1% for fruits and a decrease of 13% for vegetables when compared to the average

of the previous five years. Considering the evolution of the EU population from 486,6 million in 2003 to 497,6 million in 2008, the per capita consumption of fresh produce also decreased by 0,67% for fresh fruit and by 14,2% for fresh vegetables.

The data confirms the alarming trends of a stagnating or even declining consumption trend. The Consumption Monitor also shows that the situation varies significantly from one Member State to another. On average, the trend indicators in the monitor signal as in the previous years that around half of the EU Member States are below or just above the 400 grams a day, a minimum recommended by the World Health Organisation. The situation

is not any better in the countries analysed outside the EU. This shows that important efforts remain to be made in order to bring consumption up to satisfactory levels across all EU Member States and around the world.

This year the electronic edition of the "Fresh Fruit and Vegetable Production, Trade, Supply and Consumption Monitor in the EU-27" is the seventh edition of the report, covering the period 2003 to 2008. The publication of the CD version of the Monitor would not have been possible without the support of a number of partners that Freshfel is pleased to recognise and thank, namely Anecoop, Ailimpo, Fresh Produce Consortium and GF Group.



The Freshfel Consumption Monitor is one of the services granted by Freshfel to its members and is therefore made available free of charge for the membership. Non-members of Freshfel can order the document from the Freshfel Secretariat at a cost of €400.

QUALITY AND SAFETY

MARKETING STANDARDS

On 1 July 2009 Regulation (EC) No 1221/2008 entered into force, introducing a revamped framework of marketing standards for fruit and vegetables. The new rules keep detailed marketing standards only for the 10 leading products in terms of volume, while introducing basic conformity checks to secure that all other fruit and vegetables are safe, sound and of marketable quality.

Freshfel regrets the Commission decision to drastically cut the number of marketing standards for fruit and vegetables, an initiative taken without the support of the sector at large. The move of the Commission was also taken despite broad opposition from Member States. Today it is obvious that the new rules have not simplified operations nor reduced the administrative or financial burden for the sector. New controls and paperwork have even been introduced in some of the Member States for up to 400 fruit and vegetables to verify that all products are sound, safe and of marketable quality. Freshfel estimates that an additional import volume of 1.8 Million T of often small consignments needs to be checked according to these basic criteria, confronting the sector not only with additional checks and paperwork for issuing conformity certificates but also with unnecessary costs.

In late 2009 the Commission provided an overview of all simplification efforts undertaken in the different policy areas, thereby claiming savings worth 970 million Euro for the fruit and vegetable sector. The idea that fruit and vegetable producers would no longer have to grade their products because of the abolition of EU marketing standards is telling for the ill-preparedness with which the decision was taken. The lack of legislation has been filled with contractual clauses referring to the very same provisions of the legislation and some operators now even have to apply standards they never before had to under EU legislation.

At the end of 2009, the EU Commission eventually commissioned an impact assessment. The exercise will be carried out during the first half of 2010 and will in particular look at the situation in France, Germany, Italy, Poland and the United Kingdom. The main objectives will be to determine to what extent specific standards for fruit and vegetables in the EU are useful and to assess the validity of the arguments against or in favour of repealing specific standards. Follow-up decisions are expected in the framework of the overall revision of the EU Quality Policy by the end of 2010.



EU AGRICULTURAL QUALITY POLICY



Following a stakeholder consultation regarding the revision of its agricultural quality policy last year, the European Commission is preparing legislative proposals which will be presented by the end of the year. Given the recent overhaul of the fruit and vegetables quality policy and the impact assessment currently undertaken, Freshfel has focused its efforts on integrated production and certification schemes.

While the vast majority of fresh fruit and vegetables are grown under schemes of integrated farming, the market for products originating from integrated farming in the EU continues to be fragmented along national and regional lines. While this is partially caused by the multitude of schemes which are developed at a region level, the lack of a common baseline represents a major hurdle for a functioning internal market. Freshfel along with other associations (AREFLH, EISA, PAN Europe) has urged MEPs to reinforce the reputation and credibility of integrated production schemes throughout the EU. The call was echoed in the European Parliament resolution of 25 March 2010 entitled "Agricultural product quality policy: what strategy to follow?"

Parallel to the discussions in the Parliament, Freshfel closely followed up the Commission's efforts to establish best practice guidelines for the operation of certification schemes. The lack of real harmonisation of private standards has not been adequately addressed to date. The industry needs wider participation in forums to set standards to address the whole range of retailer demands which must be complied with. While the guidelines are voluntary, it should certainly serve as a model for new standards (e.g. carbon footprinting). Furthermore, more specific guidelines might be developed for certain policy areas (e.g. integrated production).

The guidelines for certification schemes are aiming to improve the credibility and effectiveness of such schemes. Rather than setting minimum criteria, they will highlight best practice in the operation of these schemes, thereby offering guidance on how to:

- avoid consumer confusion and increase transparency and clarity of scheme requirements
- reduce the burden on farmers and producers, including those in developing countries
- ensure compliance with internal market rules and principles.

FRESH QUALITY GUIDE

Freshfel plays an important role in disseminating timely and professional information to members in the domain of food safety and quality. To simplify and streamline the availability of information, Freshfel introduced in 2004 an online interpretative guide to operators' responsibilities to adhere to EU food safety and quality legislation. The Fresh Quality Guide is a well recognised and credible source of information for the fresh produce sectors. The Fresh Quality Guide's reputation continues to grow as a result of the dedication by Freshfel's staff to maintain the content relevant, through regular updates with the latest legislative developments (e.g. Russian MRL legislation) and the inclusion of succinct summaries and original documents.



The Fresh Quality Guide is accessible at www.freshquality.org.

FOOD LABELLING – INFORMATION TO CONSUMERS

The European Commission adopted a proposal on the provision of food information to consumers (food labelling) at the beginning of 2008. This proposal combines Directive 2000/13/EC of the European Parliament and of the Council on the labelling, presentation and advertising of foodstuffs and Council Directive 90/496/EEC on nutrition labelling for foodstuffs into one instrument. Following initial delays in the debates as well as the procedural interruption resulting from the European Parliament elections, the real discussions on the dossier only started late 2009.



post-harvest applications also have several pre-harvest applications. Explicit labelling of post-harvest treatments could potentially lead to increased use of pre-harvest in far less controllable conditions.

In this light, a low-profile lobby campaign was organised in collaboration with Freshfel members and other associations in order to get the amendment rejected. Eventually the

European Parliament's lead committee on Environment, Public health and Food safety opposed the amendment. Similar efforts are undertaken at Council level.

The proposal introduces principles to draw a clearer borderline between mandatory and voluntary information. It makes nutrition labelling mandatory in the principal field of vision of a food label. It allows for the development of best practice in the presentation of nutrition information, including alternative forms of expression of the nutrition information in relation to overall daily nutrient requirements or graphical forms of presentation.

While the Commission proposal would only have had minor implications for the fresh produce sector, Freshfel was particularly concerned with amendments proposed by MEPs regarding the mandatory labelling of post-harvest treatments on fruit and vegetables. All the substances used as such have undergone rigorous testing and have been approved under the plant protection legislation, with maximum residue levels being set and adhered to. Unlike additives and other food improvement agents, plant protection products are not a component of a product's formulation. Besides this, most substances used for

Other issues requiring close follow-up concern:

- Scope of mandatory nutrition declaration (exemption for fresh convenience)
- Definition of non-prepacked products (possible implications for open boxes)
- National provisions for non-prepacked products (single market issues)
- Obligation to label the importer within the EU (limit to producer/packer in country of origin)
- Obligation to label the country of origin (practical implications for mixed products)
- Transition periods

Both the European Parliament and the Council should finish their first reading before summer. Given the many political issues that remain, a second reading will be necessary before a compromise can be reached. The finalisation of the legislation is therefore not expected before the end of 2011.

TRACEABILITY

Recent developments regarding traceability requirements in the supply chain will lead to significant changes for the fresh produce industry. In order to make sure that future requirements will take into account the specificities of the fruit and vegetables sector, common positions will need to be identified. In this light Freshfel organised a dedicated session on traceability in the framework of its Working Group on Food Quality & Safety. Besides company perspectives, the latest developments regarding GlobalGAP and GS1 were reviewed, as well as the ongoing initiatives in the USA. The subject will be regularly tabled on the agenda of the Working Group on Food Quality & Safety, while a dedicated subgroup will be dealing with the more technical issue.



PLANT PROTECTION PRODUCTS

Following the EU MRL-harmonisation on the 1st of September 2008, the full implementation of Regulation (EC) No 396/2005 is gaining pace. Since the start, a myriad of MRL-changes have already been submitted, the majority for fruit and vegetables. The European Food Safety Authority (EFSA) is also reviewing all MRLs of active substances authorised in the EU. Meanwhile efforts are continuing to develop methods for cumulative assessment (multiple residues), with the results of a pilot project on triazoles finalised in 2009 and the research project Acropolis starting in 2010.

The European Food Safety Authority (EFSA) published its first Annual Report on Pesticide Residues in 2009, which provided an overview on the pesticide residues in food observed throughout the European Union (EU) during 2007 and assesses the exposure of consumers through their diets. The report showed that the majority of the samples complied with the legal Maximum Residue Levels (MRLs). 96 % of the samples analysed were compliant with the legal MRLs and 4 % exceeded them, compared to 5% in 2006. The incidence of multiple residues was also slightly lower than last year.

As downstream users of plant protection products, the fresh produce industry needs a successful and innovative agro-science industry to ensure that a wide range of plant protection solutions are available to address pest control. Following the adoption of the EU pesticide package (authorisation and use) in January 2009, the legislative documents were eventually published in December.

Freshfel further collaborates with other industry associations to advocate practical solutions for minor uses (i.e. most fruit and vegetables). At EU-level Freshfel will actively pursue the establishment of an EU promotion fund for minor uses as the EU Commission will need to report to the European Parliament on the need and feasibility of such a fund. Separately the EU Commission will also need to report on the need and feasibility of the traceability of information from users to retailers concerning the applications of plant protection products on agricultural products.

Freshfel will continue to highlight the efforts undertaken by the sector, specifically to minimise residues on foods in line with consumer expectations. The association will also ensure that strong dialogue exists between all partners to highlight emerging trends within the commercial and legislative environments to provide sound facts for industry decision-making. The secretariat presented these trends in specialised conferences notably in Turkey and the USA.



PLANT HEALTH REGIME

The existing Community Plant Health Regime (CPHR) aims to protect the EU territory against the introduction and spread of regulated organisms which are harmful to plants and is the result of decades of legislation. However, since its inception various major changes and developments have taken place in relation to the CPHR which justify a comprehensive evaluation of the regime. Therefore, the European Commission is currently developing a new Community plant health strategy. The revision process started in 2009 with an evaluation of the existing CPHR.

Freshfel contributed to this evaluation by consulting members on their experiences with the current CPHR, coordinating this information gathering and elaborating a detailed position paper with suggestions for a way forward. This document was sent to the consultants carrying out the evaluation and to the European Commission, which has published it on the corresponding Commission website as a stakeholder contribution to the debate. At a major conference in February 2010 which aimed to explore ways to modernise the EU's plant health legislation, these findings and proposals were presented among others to the audience through the agri-trade umbrella organisation CELCAA.

According to the feedback Freshfel received from its membership, the current CPHR is all-in-all partly still appropriate. However, possibilities exist to improve the CPHR: There is a need for more

information and communication as well as more transparency and harmonisation. Furthermore, increased focus should be given to prevention and early action and a new regime should optimise the requirements for trade, providing more reciprocity and recognition on the world market.

With the reform of the CPHR just started, Freshfel is therefore already actively involved in the ongoing discussions and welcomes at any stage of the process the active involvement and input of members to build up a convincing and strong argumentation for the viewpoints of the fruit and vegetables sector. The next steps will be a second major conference in October 2010, which will be the starting point for the Commission to draft the legislation framework and to carry out the impact assessment. By the end of 2011 the legislation proposal will then be presented by the Commission.



ORGANIC PRODUCTION



With the task to create a new organic logo for the EU, the European Commission involved design and art students from all over Europe by launching the EU organic logo competition. The winning design is the "Euro-leaf" logo which gained 63% of the overall vote. The design shows the EU stars in the shape of a leaf against a green

background, and is intended to imply two clear messages: Nature and Europe.

From 1st July 2010, the new organic logo of the EU will be obligatory on all pre-packaged organic products that have been produced in any of the EU Member States and meet the necessary standards. It will appear on the market over a transition period of two years and will be optional for imported products. Other private, regional or national logos will be allowed to appear alongside the EU label. The new logo aims to enhance consumer protection and promote organic farming.

Freshfel is active in providing information and assistance to members to cope with this and other respective legislative developments and participates regularly in the 'EU Advisory Committee on Organic Farming'. Furthermore, Freshfel aims to closely follow developments with regard to organic farming and is also attending conferences such as the 2nd European Organic Congress, in order to network with European and national authorities, civil society and sector representatives.

INCREASED IMPORT CONTROLS FOR EMERGING RISKS

On 25 January 2010 Regulation (EC) No 669/2009 entered into force, entailing increased levels of controls (i.e. 100% documentary checks and a certain % of physical checks) for imports into the EU of selected fresh produce from the Dominican Republic, Thailand and Turkey. The consignments will have to be pre-notified and will only be able to enter through designated points of entry in each Member State. At present physical checks only involve pesticide residue monitoring.

With a view to the entry into force of the new regime, certain practical concerns regarding the contact details of designated points of entry as well as the establishment of common entry documents by operators remained. Freshfel along with Frucom (association for dried fruits and nuts) called on the European Commission to alleviate these concerns with the greatest priority and provided practical guidance documents for the ease of use of operators.

Control delays and costs related to additional transport and lab tests remain critical and are sometimes prohibitive, particularly for air freighted produce. Freshfel, in close collaboration with its members, supplied detailed information on first hand experiences in different Member States to the Commission services. During the summer, the list of product/country combinations will be reviewed. In this light, Freshfel will carefully analyse any changes and will advocate smoother implementation rules by Member States.



ASSISTING THE INDUSTRY IN PRACTICAL CASES



One of the key aspects of Freshfel's day to day work is assisting members when dealing with regulatory issues. Given the wide scope and complexity of food quality and safety legislation, a lot of member requests are related to this policy area. When emerging issues are relevant to operators across the board, the Freshfel secretariat provides explanatory statements and when needed regular updates of the situation.

In the past year, the secretariat issued among others guidance on the labelling requirements of SO₂-pads and the information duties required by the REACH-legislation.

Freshfel also assisted operators and national organisations during April 2010 when routine checks in Sweden, table grapes originating from India were reported with Chloromequat

residues above the detection level. Given the limited use of the plant growth regulator in fresh fruit and vegetables, no technical dossier was specifically submitted for table grapes. As a consequence, the MRL was administratively set at the level of detection (0.05 ppm). A number of retailers subsequently questioned their on-going programmes for seedless table grapes originating in India. Consequently, table grape operators were suddenly confronted with a major and unexpected commercial disruption.

In response, operators embarked on intensive monitoring of Indian table grapes. Since the alert occurred, the industry undertook more than 600 analyses within the chain. In total, close to 40% of the samples analysed appear not to be complying with the default level of detection. Given the EU scope and potential implications Freshfel kept in touch with the EU Commission, which in turn sought an urgent opinion from EFSA. EFSA confirmed that the levels detected did not pose health risks to consumers. Freshfel urged the EU Commission to inform Member States of the legal options in order to avoid the disposal of perfectly safe food. Consequently Ireland and the United Kingdom provided clear guidance to operators triggering a procedure at EU-level. While no agreement on a temporary MRL could be reached to alleviate concerns in the current season, a solution should be in place for the next season given the support from the manufacturer. The case will be discussed in depth in future Freshfel working groups to improve overall risk management in the sector.



INDUSTRY COOPERATION

The horizontal nature of food safety legislation and its increasingly complex nature has given rise to numerous initiatives in which industry can exchange views and raise awareness on emerging issues. Since its creation in 2003, Freshfel continues to be active in the **Food Chain Roundtable on Pesticides**. This forum proved to be useful for the discussion on common issues regarding plant protection products and their residues. Initially the brainchild of Freshfel and the European Crop Protection Association (ECPA), the group includes today representatives from the main food chain partners including farmers (COPA-COGECA), agri-food traders (CELCAA), food manufacturers (CIAA) and associated industries. Freshfel is co-chairing this group with ECPA.

Given its proactive stance on plant protection products Freshfel was invited by GLOBALG.A.P. to be part of its **Crop Protection Working Group** (CPWG). The

Freshfel secretariat and an expert of the association (Jean-François Proust –Forum Phyto, France) regularly participate in the meetings of the CPWG. The group is dealing with a number of important matters, such as non-compliance, confidence and other legislative/non legislative developments. In the last year of activity, the CPWG dedicated work on the matter of unprovided use/speciality crops, criteria for laboratories, residue monitoring systems and also look at the setting up of IPM guidelines. GlobalGAP is moving towards a revision of its protocols in October 2010 and the CPWG has been monitoring the changes that are being planned.



Given similar interests in a wide range of issues concerning plant protection products and their residues, Freshfel is cooperating intensively with AREFLH (association of European F&V producing regions) and PROFEL (association of the processing F&V industry) through participating at food safety working groups of one another.

In the framework of the future authorisation rules for pesticides, Freshfel joined forces with AREFLH and PROFEL to defend the interests of the fruit and vegetables sector. Whereas the legislation has been adopted, the associations remain committed

to improve the situation of minor uses and will seek to obtain an EU Promotion fund for Minor uses. In this light they co-organised the Specialty crops & Minor uses conference on 4 November 2010. In line with practices in the processed fruit and vegetables, a working group of officials and

sector experts from several Member States has been set up to identify priorities and strategies to advance the situation for minor uses in the fresh fruit and vegetables segment.

More general and since 2004, European federations representing all stages of the food chain established a forum to discuss issues relating to food safety. The **Food Safety Platform** allows all stakeholders federations to share information and provide an early-warning system to ensure that all sectoral representative organisations are aware of each others' actions and foreseen changes in the legislative environment. Freshfel regularly participates in the meetings of this Platform.





SUSTAINABILITY

ENVIRONMENTAL SUSTAINABILITY



increased requirements from consumers, and it is continuously looking for improvements in the supply chain. The sector has seen the highest uptake of organic and integrated farming systems and is addressing its GHG emissions through the establishment of a carbon footprint methodology and carbon offsetting schemes. Freshfel is taking a key role by assisting its members to understand the various implications of this dossier and coordinating research efforts.

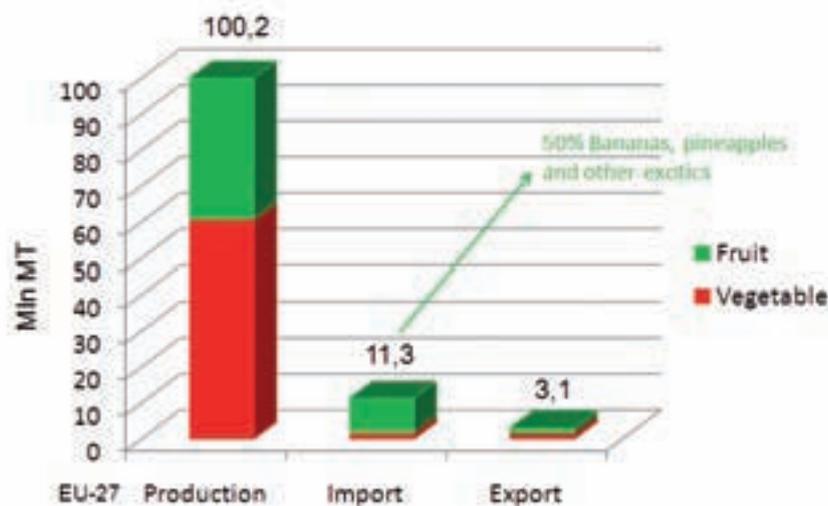
The association thereby stresses the need for an integrated policy approach to food supply, based on life-cycle assessments and the consideration of wider social and economic implications. Freshfel remains wary of a dogmatic debate resulting from simplistic messages such as buying local, seasonal and organic. Indeed today's supply is already largely local and/or seasonal, making it more a perception issue that diverts the attention away from real solutions. The climate change debate should not be taken as a tool for protectionism or favour a particular growing method which will always be detrimental to the category as a whole and will unnecessarily reduce the choice of consumers.

Sustainable development has rapidly shifted upwards in the political agenda, and public authorities are now actively promoting the consumption of 'green products'. The EU Action Plan on Sustainable Consumption and Production, launched mid-2008, already provides a clear example of this through its guidelines for the green public procurement of foodstuffs, focusing particularly on fresh fruit and vegetables and fish.

As the debate on climate change gained

political momentum with a view to the Copenhagen summit, Freshfel held a dedicated working group to review the various aspects of this complex dossier and its implications for the fresh produce sector. The reduction target of greenhouse gas emissions (GHG) of 80% by 2050 will imply a change in the behaviour which will touch upon the whole sector and all of its stakeholders.

The fruit and vegetable sector has been proactive in developing sustainable agricultural practices to cope with



Source: Eurostat/Faostat figures based on the average of the last 5 years

Acknowledging the complexity of the debate, EU food chain partners, including Freshfel, have set up a joint initiative, the Food Sustainable Consumption & Production Roundtable, in order to collectively address the challenges regarding assessment methodologies and communication tools, while also exchanging best practices. A European or even an international approach is a must to avoid the proliferation of solutions and schemes which will ultimately add confusion and cost to the chain. Public authorities should show leadership for a common solution with an integrated policy approach rather than focusing on simplistic messages and certain food segments.

The European Food Sustainable Consumption and Production (SCP) Roundtable launched in 2009, constitutes a major contribution from the food sector to the EU's ambitions in the field of Sustainable Consumption and Production, bringing together farmers and their suppliers, agricultural traders, food and drink producers, retailers and civil society representatives.

The Roundtable will add significant value to initiatives outlined in the European Commission's 2008 Action Plan. It is currently finalising principles to facilitate uniform and scientifically reliable environmental assessment methodologies for food products. Parallel to environmental assessment methods, the Roundtable is examining key sustainability challenges along the food value chain (e.g. climate change, water conservation, waste reduction) and is developing adequate strategies to address them.

Environmental labels are not the best way forward for the fruit and vegetable category given the complexity of the supply chain and associated costs. The carbon and environmental footprinting tools will rather help the sector to identify problem areas and solutions and to assist clients and retailers to meet consumer demands and Corporate Social Responsibility goals.

While the complexity of the debate still represents a major hurdle towards communication to the public, consumers are looking for concrete information and advice on how they can make a difference in addressing climate change and wider sustainability issues. As the record of fresh produce on carbon footprint is excellent compared to other food categories, public authorities should join forces with stakeholders to stimulate a change of attitudes and motivate consumers to move their habits towards fresh fruit and vegetables. Several consumer and environmental groups have already called for increased fruit and vegetables consumption as an undisputed, easy and healthy way for consumers to address climate change. Hence fruit and vegetables are not only an essential contribution for improving the health of consumers but also moving towards a better environment.



SOCIAL RESPONSIBILITY

While social standards have become common within the exotics segment of our industry, recent NGO campaigns on other commodities and European produce have caused retailers to evaluate their sourcing strategies and to generalise the concept of social standards to other product categories and origins. In this light Freshfel closely follows developments in this area, collecting information and best practices. This subject is regularly tabled on the agenda of the Food Quality & Safety Working Group, such as through presentations by standard owners, which allows debate and the exchange of views.

TRADE POLICY

Over the past year, Freshfel has continued to closely monitor and actively participate in the debate on trade issues that have an impact on the fruit and vegetable sector. The continued expansion of trade through the network of regional and bilateral trade agreements negotiated by the EU is of major importance to the sector. Freshfel is eager to keep members updated of progress in these trade agreements to allow them to take advantage of the growing number of opportunities for European fresh produce.

The annual meeting of the import and export divisions at Fruit Logistica remains one of Freshfel's cornerstone activities, where important topics in this area are reviewed. This year the meeting was

attended by close to 50 delegates. Chaired by Jacques Azoulay (CSIF/FFIFL – Katopé International, Univeg Group, Import division) and Willem Baljeu (Frugi Venta, Export division), the meeting presented an excellent opportunity for members to highlight issues of importance and exchange views on the latest developments.

Freshfel has overseen the expansion of the EU's "Global Europe" trade strategy, furthering market access and trade through the development of free trade agreements. Later this year, this strategy will be replaced by a new, more expansive and comprehensive trade strategy which will build on the evolution made through Global Europe, whilst combining this

with the ambitious EU 2020 strategy. Freshfel will keep members informed of the development of this strategy and will prepare its submission to the consultation process in due course. Freshfel's policy is one of free trade, always insisting that reciprocity in trade should be one of the key elements of sustainable trade growth.

Freshfel Europe closely cooperates with the European Commission to promote a positive agenda for the EU in its international trade negotiations. Freshfel participates regularly in the Civil Society Dialogue meetings held by DG Trade, as well as the Sanitary and Phytosanitary Market Access Working Group on plants and plant products.

MARKET ACCESS STRATEGY

Market access is a key part of Freshfel's trade strategy, and Freshfel participates regularly in the Market Access Working Group on SPS issues organised by DG Trade. This meeting gives Freshfel the opportunity to provide updates on important market access issues for fresh produce, and to highlight some of the difficulties faced by exporters to third countries.

Freshfel also maintains a close working relationship with the unit of DG Trade responsible for SPS issues, and has provided input on a number of dossiers on non-tariff barriers in third countries and improving market access possibilities for EU fresh produce. Freshfel regularly consults with its members on these issues, and actively encourages them to provide input on difficulties faced with exports of fruit and vegetables to countries outside of the EU.

MULTILATERAL TRADE & WTO



Freshfel is closely following the progress of the ongoing negotiations for a multilateral trade deal through the World Trade Organization. The Doha Development Agenda of the WTO has been ongoing since 2001, however progress has been limited since the talks broke down at the July 2008 ministerial after failing to reach a compromise on agricultural import rules. Many countries still have reservations over the package

discussed at the 2008 ministerial, and finding a compromise which satisfies all participants is likely to take some time. Further adjustments from the United States are also scheduled to take some time to be agreed upon, and are unlikely to be brought to Congress before the mid-term elections to be held this November. Discussion groups are continuing in order to ensure that what has already been agreed upon is kept, and that progress up to now is not lost, however further political will is required to see significant movement in the negotiations. Movement in 2010 is thus unlikely, with advancement in 2011 being a more realistic target. Freshfel will continue to closely monitor this situation, and will inform members of progress in the talks as and when it occurs.

In further developments, Freshfel welcomes the recent notification by Russia that it will seek to join the WTO as an independent country and no longer as a joint customs union with Belarus and Kazakhstan. As the only major economy outside the 153-member WTO, it is hoped that Russian accession to the WTO will lead to a more stable and cooperative trade in fresh produce with Russia in the future.

REGIONAL & BILATERAL TRADE AGREEMENTS

Freshfel welcomes the European Commission's initiative to promote free trade through the establishment of a network of bilateral and regional free trade agreements. Regular participation in DG Trade's Civil Society Dialogue allows Freshfel to put forward the views of the fruit and vegetable sector in ongoing trade negotiations, whilst being kept up-to-date with progress and new developments. In the last few months several important negotiations were finalised namely with Morocco and Egypt but also important for bananas the various agreements with Andean and Central American countries as well as the implementation of EPA with ACP countries. The following table summarises the current regional and bilateral negotiations underway:

Type of negotiation	Negotiating Partner & Progress	
Regional	Central American countries	Negotiations for an association agreement were finalised and formally concluded in May. Will still take time for the agreement to be agreed upon by the Council and Parliament.
Regional	Andean Community of nations	Bilateral agreements have been signed with Peru & Colombia. Ecuador may now choose to negotiate a bilateral agreement having seen the successful conclusion with the other two countries.
Regional	MERCOSUR (South America)	Having been stalled since 2004, talks for an FTA were formally re-launched in May, with the first round in July. Objections from several member states over the possible effects on EU agriculture.
Regional	ASEAN (South-East Asia)	Since the possibility for a regional agreement was deferred, progress has been made on several bilateral FTAs, namely with Singapore, Vietnam & Malaysia, with other countries to follow.
Regional	African, Caribbean and Pacific	Interim EPAs were initialled by most regions, with negotiations for full EPAs to continue. Progress is foreseen in the coming months with East & West African regions.
Bilateral	India	This negotiation is the "flagship project" of the EU, and is by far the biggest and most important bilateral deal currently in negotiation. 9 th Round of negotiation took place in April, with the aim being to conclude negotiations by the end of the year.
Bilateral	Ukraine	10 th Round of negotiations took place in March, although there still remains a lot of progress to be made. Full engagement from Ukraine on tariffs is expected as of July.
Bilateral	South Korea	FTA negotiations concluded, and Council approval should be received after the summer which should see provisional application of 95% of the agreement before the end of 2010.
Bilateral	Israel	The new Free Trade Agreement was completed last year and entered into force in January 2010.
Bilateral	Egypt	The new FTA recently agreed upon is likely to enter into force on 1 June 2010.
Bilateral	Morocco	The text of the recent agreement is currently under discussion at the Parliament, and will come into force at the earliest on 1 January 2011, but may take longer depending on the ratification process.
Bilateral	Canada	Negotiations are advancing quickly, and are expected to conclude in 2011.
Bilateral	Norway	A draft agreement on trade in agricultural products was initialled in February. This accord will provide full liberalisation to the Norwegian market for an additional 20% of EU agricultural exports.

SPECIFIC TRADE DOSSIERS

Freshfel is involved on a day-to-day basis in a large number of dossiers. More concretely, last year has been marked by a series of important dossiers such as:

- ✓ Implementation of the “Geneva Agreement” on bananas for the reduction of tariffs and requests from Freshfel in the framework of the CAP simplification to simplify the import procedure by repealing the monitoring licences.
- ✓ Revision of the import provisions for garlic by amending the rules managing the tariff rate quota.
- ✓ Coordination of positions on the negotiation of protocols and work plans to access third country markets. Freshfel in

particular closely monitored the entry into force of kiwifruit protocols in China and the elaboration of a work plan for the export of apples and pears to the USA.

- ✓ Representation of the specificity of the fruit and vegetable sector in the revision and modernisation of the Customs Code.
- ✓ Ongoing monitoring of the entry price regime and unit prices, although there has been little progress on this dossier pending possible reform to follow conclusion of the Doha Development Agenda of the WTO. This system has also been maintained in the Free Trade Agreements recently signed with Korea, Peru & Colombia.

EXPERTS GROUPS & FRESHFEL/SHAFFE CITRUS WORKING GROUP

Freshfel is proactively involved in the various expert groups of the Commission, namely on tomatoes, apples and pears, peaches and nectarines and citrus. Freshfel is attending these meetings with its own experts from the sector and also contributes with presentations and perspectives.

In regard to citrus, a great part of the input is generated by the outcome and expertise resulting from the Freshfel-SHAFFE Citrus Working Group. This joint initiative which was already launched 3 years ago provides specific analysis on the citrus sector for the benefit of the members and the citrus community at large. Since its inception, the group has grown to incorporate many interested parties keen to input and participate in the analysis and discussion within this forum. This Working Group has had

a very successful year, with excellent cooperation between members helping to consolidate the structure and reinforce its place as a key platform for discussion in the global citrus community.

The Citrus Working Group was created to provide a reliable and accurate information network for the increasingly globalised citrus industry. The citrus WG ensures that information is exchanged in a mutually beneficial environment, helping to promote accuracy and transparency, as well as helping in the resolution of specific sector difficulties.

The citrus working group is chaired by José Antonio Garcia of Ailimpo, Spain, and counts on the support of citrus producers, exporters and importers from key regions. The Citrus WG includes northern hemisphere producers from

the Mediterranean basin region and the USA, as well as southern hemisphere producers and exporters, namely South Africa, Australia and South American countries. Furthermore, the inclusion of market analysis from the principle markets within the European Union such as the UK, Germany, Spain, France and the Benelux, as well as the USA and Russia, enables thorough supply and demand analysis to give a comprehensive overview of the sector.

The Citrus Working Group has now an agenda set throughout the year mainly structured around teleconferences and a joint physical meeting in Berlin. Information shared among members is made public through press releases and/or on the website.



Date	Specific Topic	Type
September	Preliminary NH forecast / SH Ending Season	Teleconference
October	NH Forecast / SH Balance	Teleconference
December	NH ongoing season	Teleconference
February	Preliminary SH Forecast – Development NH	Berlin Meeting
April	SH Forecast / NH Ending Situation	Teleconference
June/July	SH ongoing season	Teleconference



As of 2010, Freshfel is also setting up an ad hoc committee with Board representation to follow as appropriate the matter of concerns for bananas.



HEALTH AND NUTRITION

EUROPEAN PLATFORM ON DIET, PHYSICAL ACTIVITY AND HEALTH

With the aim of exploring best practices and encouraging voluntary actions in the fight against obesity, the European Platform for Action on Diet, Physical Activity and Health was launched in March 2005 by the EU Health Commissioner at the time, Markos Kyprianou. Freshfel has been a full member since the summer of 2005. The main purpose of the Platform is to conduct open and informal discussions to examine ways of achieving binding commitments aimed at tackling the obesity epidemic and at addressing diet-related chronic diseases such as cardiovascular disease.

To date the Platform involves 33 member EU organisations including food manufacturers, retailers, the catering industry, advertisers, consumer and health NGOs, and health professionals. The World Health Organisation (WHO), EU Presidencies, some Member States, EFSA as well as the European Parliament are represented at the Platform as observers. Together with AREFLH, Freshfel represents the fruit and vegetable sector in the Platform.

The Platform meets at regular intervals for plenary meetings to monitor overall progress and discuss relevant issues. The latest plenary meetings took place in July, September and December in 2009, and February and May in 2010, addressing subjects such as food labelling, public private partnerships, lifestyles and education, and most recently in May focusing on commitments in the field of reformulation. The “energy out” side of the

obesity equation also received attention with increased collaboration between Platform members working in the area of physical activity.

The EU Platform is now in its sixth year of operation. 2010 will be an important year for the Platform since the European Commission will report to the Council and

Parliament on progress on the EU Strategy on Nutrition, Overweight and Obesity. As part of this reporting, the Platform will be subject to an external evaluation, exploring the Platform’s work during the first four years of its existence. The evaluation will assess in particular the Platform’s effectiveness in achieving its objectives, whether the commitments made by its members are in

line with the original ambitions, the impact generated in policy at national and European levels, and the role of the Platform as a place for dialogue. Results from this evaluation are expected to be available in the summer of 2010.

Over the six years of the Platform, more than 200 commitments have been submitted by members, covering a very wide range of activities, including actions in key fields such as consumer information, including labelling, education, physical activity promotion, marketing, advertising targeting children and product reformulation. Platform members have agreed to monitor and evaluate the performance of commitments in a transparent, participative and accountable way.



“Fresh Times” – At the time when this commitment was undertaken, there was no real pan-European centralised exchange of information on promotional campaigns among different actors due to the diversity of actions, the fragmentation of the sector and the lack of organisation and reporting. Freshfel engaged to publish this bi-monthly newsletter which aims at raising awareness and exchanging information from members and non-members on promotional activities to increase fresh fruit and vegetable consumption in Europe and beyond. Best practices can in this way be broadly known and reproduced, which in turn benefits the consumer.



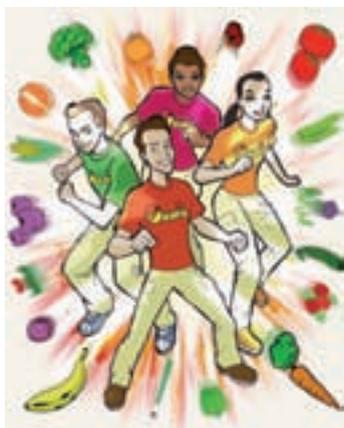
“Fresh Charter” – Work places are important settings to promote healthy lifestyles. By endorsing the “Fresh Produce Charter” Freshfel invites companies and associations to provide fruit and vegetables for employees and visitors at meetings and in reception areas, which helps them to make better, healthier snack choices.



“Consumption Monitor” – Although a significant number of national reports and studies on the consumption of fruits and vegetables are available in the various EU Member States (often in different formats), consolidated information on fresh produce consumption at the European level remains scarce. Freshfel Europe is committed to fill this gap with its annual ‘Consumption Monitor’. In a single document Freshfel sets out consolidated information on fruit and vegetable consumption across Europe per year. The document includes a general section on the EU’s total gross supply of fresh fruit and vegetables and specific sections by country.



COMMITMENTS ARE:



“Fit Dudes” – The ‘Fit Food Dudes’ Healthy Eating and Physical Activity Programme will extend the work of the original ‘Food Dudes’ programme by using the principals of role-modelling, rewards and repeated exposure to encourage primary school children to be more active (as well as encouraging them to eat more fruit and vegetables).

“Pro Greens” – Recent research has demonstrated the health benefits of eating a diet rich in vegetables and fruit. In Europe, children’s consumption of fruit and vegetables is far below the current recommendations. The main objective of this project is to assess the current intake and to develop effective strategies to promote consumption of fruit and vegetables of school children across Europe.



“School Fruit Scheme” – Through this commitment, a unique collaboration between the public health sector (EPHA – European Public Health Alliance, and EHN – European Heart Network) and the fresh fruit and vegetables sector (Freshfel) has been established to provide Platform members and the Directorate-General for Health of the European Commission with information on their work in relation to implementing the EU School Fruit Scheme (EU SFS).



It is important to note that following the recommendation of Freshfel, the meeting of the Platform enjoys a large basket of fresh fruit for delegates to enjoy during the meeting. Baskets are empty when the morning and afternoon session are over! This example demonstrates that actions can be taken to improve behaviour and eating habits at the work place and to change lifestyles!

NUTRITION & HEALTH CLAIMS

Regulation 1924/2006 on nutrition and health claims made on foods (published in Official Journal L 12 of 18 January 2007, and in force since 1 July 2007) sets up the conditions for the use of nutrition claims (such as "low fat") and health claims (such as "helps lower cholesterol") based on nutrient profiles. This Regulation will become increasingly important for the sector. It provides:

CLAIM DEFINITION

The Regulation (Article 2§2.1) defines claims as *"any message or representation (...) including pictorial, graphic or symbolic representation, in any form, which states, suggests or implies that a food has particular characteristics."*

This definition could help defend fresh fruit and vegetables from the use (or rather abuse) of the positive image of these products by other processed foods.

As general requirements are that the use of nutrition and health claims shall only be

permitted if the average consumer can be expected to understand the beneficial effects as expressed in the claim, and that nutrition and health claims shall be based on and substantiated by generally accepted scientific evidence.

NUTRIENT PROFILING

Claims may only be used if a food product meets a certain profile, i.e. appropriate ratios of salt, fat and sugar. Nutrition claims can fail one criterion, i.e. if only one nutrient (salt, sugar or fat) exceeds the limit of the profile a claim can still be made provided the high level of that particular nutrient is clearly marked on the label. Health claims cannot fail any criteria. National recommendations on food intake (i.e. "5 a day") will be taken into account.

Exemptions from the requirement to respect established nutrient profiles are envisaged for certain food or categories of foods depending on their role and importance in the diet of the population. Exemptions will almost certainly include: *"Fruit, vegetables and their products, presented fresh, frozen, dried, or under any other form in so far as they contain no added sugars, salt or fat"*.

Food categories, specific conditions & thresholds: The European Commission is

proposing a category *"Fruits, vegetables, nuts, and their products"*, with the specific condition that the finishing products contain a minimum of 50g per 100g of fruit, vegetables or nuts. The following thresholds would also apply: maximum of 400mg sodium, 5g saturates and 15g sugars per 100g.

According to the Regulation, nutrient profiles should have been developed by 19 January 2009, based on an opinion of the European Food Safety Authority (EFSA).

NUTRITION CLAIMS

'Nutrition claim' means any claim which states, suggests or implies that a food has particular beneficial nutritional properties due to energy, nutrients or other substances. A list of authorised nutrition claims and the conditions for use is published in the Annex of the Regulation. Comparative claims may only be made between foods of the same category, taking into consideration a range of foods of that category.

http://ec.europa.eu/food/food/labellingnutrition/claims/community_register/index_en.htm



HEALTH CLAIMS

'Health claim' means any claim that states, suggests or implies that a relationship exists between a food category, a food or one of its constituents and health. These are divided in Article 13 and Article 14 claims. Functional claims (Article 13 of the Regulation) (such as "calcium is good for your bones") will be included in a "positive list" that the European Commission was required to draw up by 31 January 2010, based on EFSA's scientific advice.

Due to the difficulty of dealing with all requests, EFSA is now analysing Article 13 claims in bunches. The first series was published in October 2009. A second series was published in February 2010, and additional series will be published throughout 2010 and 2011.

<http://www.efsa.europa.eu/en/ndaclaims/ndaclaims13.htm>

These claims do not include those related to children's development or health or disease risk reduction claims (Article 14 of the Regulation). Disease reduction claims (defined as any health claim that states, suggests or implies that the consumption of a food category, a food or one of its constituents significantly reduces a risk factor in the development of a human disease), and claims referring to the health of children require full authorisation on a case-by-case basis, following the submission of a scientific dossier to EFSA.

http://ec.europa.eu/food/food/labellingnutrition/claims/community_register/index_en.htm

Given the complexity of this dossier and the importance to have the interests of the sector taken into account, Freshfel will intensively be in contact with its interested members to represent as appropriate the interests of the sector.





RESEARCH & INNOVATION

Research and innovation are key to any industry in maintaining competitive advantage, addressing new consumer needs and improving the supply chain.

Whereas research and innovation primarily falls within the remit of individual companies or groups of companies, Freshfel acknowledged the need for collective action in certain areas. In this light, Freshfel has taken a more active role with regard to the EU research funding.

The necessity for research project coordinators to demonstrate the relevance and benefits has increased the importance of sector involvement and improved dissemination. As a result the most recent call for proposals has led Freshfel to be approached on a number of relevant projects for the fresh produce sector. The Freshfel Board considers if projects are relevant for the members of Freshfel and consequently decides whether the association should support the project.

The first project supported by the association and approved by the European Commission will start as of July 2010 for a period

of 3 years. The Acropolis project aims at developing models and strategies for assessing risks arising from cumulative and aggregate exposure to pesticides with a similar mode of action, suspected additive or synergistic effects, or complex mixtures. This research will contribute to improving the European policy and regulatory basis and benefit the international community. The project is coordinated by a consortium led by Wageningen University in the Netherlands. Freshfel involvement is sought as a work package leader with regard to stakeholder involvement, in collaboration with the University of Ghent.

The Seventh Framework Programme (FP7) bundles all research-related EU initiatives together under a common roof playing a crucial role in reaching the goals of growth, competitiveness and employment.

The programme runs for seven years, it became fully operational as of 1 January 2007 and will expire in 2013. The EU Member States have earmarked more than € 1,9 billion for funding in the area of Food, Agriculture and Fisheries, and Biotechnology over the duration of FP7.



STIMULATING CONSUMPTION

COMMUNICATION & IMAGE

Under the auspices of the **Promotion, Communication and Image Committee**, Freshfel started in 2009 a reflection about how to better tackle the communication and image issues surrounding the association. This revamping of the communication strategy would not only benefit the association, but also and importantly lead to a better image for the fresh produce sector. The committee, chaired until its last meeting of 2009 by Laurence Swan, has initiated a review of the communication, image and marketing challenges faced by the association, with challenges of communication being both internal within the association and towards third parties.



Based on this evaluation, there are a number of areas where actions have already been reinforced:

- ✓ Addressing the main deficits of image or misperception in regard to fresh fruit and vegetables: Freshfel is often confronted with statements which need to be addressed referring to price, safety, nutritional value, convenience, organic versus conventional, or “buy local”. Fact sheets on several of these issues have been prepared and have been made available to members.
- ✓ Addressing communication with consumers: Fresh produce has many positive assets, in particular healthy properties widely recognised by the scientific community. There is a wealth of scientific findings which are published every year but regrettably sometimes these findings are difficult to translate into concrete and practical messages. An ad hoc research has been carried out which has concluded in a study on the misuse of the image of fresh produce by other industries. The role of Freshfel and the link with national associations or other bodies at national level in charge of promotion and communication needs to be assessed.
- ✓ Relationship with its Members: Freshfel has already improved the format of its communication to members by revamping its website, launching a new extranet and improving the format of the Newsletter and Press Review.
- ✓ Communicating with media and decision makers: Freshfel has re-launched the Headlines and multiplied the number of press releases as well as starting a media networking through Facebook and being more visible in search engine results. Freshfel has also embarked in a process of preparing a number of statements on key issues in the format of Frequently Asked Questions. This will help members and the association to speak with a common voice and provide access to key data and facts.
- ✓ Support the work of the scientific community: The scientific community could provide useful input on the benefits of consuming fruit and vegetables. Freshfel could play an active role in liaising with the researchers and disseminating results of the findings. The support of the health community is also sought. The success of EGEA in policy setting is a clear example of the win-win situation of such a partnership.
- ✓ Visibility: Evaluate the role and benefits of Fresh and Fruit Logisitica for the networking and visibility of the association.



EU PROMOTION POLICY

Freshfel closely follows the EU promotion policy which has been consolidated in the European Regulation 3/2008 on the Promotion of Agricultural Products. Freshfel's input is mainly voiced through the European Commission Advisory Group on Promotion of Agricultural Products. This Advisory Group guides the European Commission on its promotion policy and in particular regarding the EU Regulation 3/2008, which used a total budget of €39 million in 2009. The scheme remains attractive for fresh produce as applications and projects are above the indicative threshold set for fruit and vegetables. Freshfel continues to seek a better functioning of the scheme allowing more flexibility and also the possibility to use private brands within the scheme.



In the period 2009/2010 the EC Advisory group on promotion has discussed notably the need for changing the current regime. With the renewal of the Commission in 2010, the opportunity has come to voice the proposals of the Advisory Group stakeholders, and bring the fundamental changes needed to EU promotion policy. The Group has worked hard to approximate positions in the last years and to offer concerted and unanimous proposals to the Commission. However, apart from certain technical adjustments, no major improvements have been achieved concerning the revision of the Regulation. Freshfel is also calling for a greater transparency of the accepted programmes and also for having greater insights into the motivation of the Commission for rejecting specific programmes. Based on the outcome of the EGEA conference, Freshfel will also seek to adjust the priorities of the eligible programmes to include the most deprived persons in the priority target groups.

On a collective basis together with the other agri-food organisations, Freshfel is supporting the following requests elaborated by the advisory group to review the current regime:

1. Better balance between generic promotion and trademarks in non-EU countries

Need for clarification of the conditions under which branded products could be exhibited in fairs and exhibitions in non-EU countries, provided that there are several of them, as an illustration of the diversity of what Europe has to offer. This is a key point if we want programmes to be co-financed by the private sector on the one hand, and efficient promotion campaigns on the other.

2. Need for more specific Community guidance in view of organising the management of programmes involving more than one Member State

In multi-country programmes, several of the difficulties encountered by operators are linked to the lack of contacts between stakeholders involved. Article 9(4) of regulation 501/2008 states: "The Member States shall agree on administrative collaboration procedures to facilitate the monitoring, implementation and checking of the programmes". This provision should be clarified by mentioning that a meeting should be organised before the start of the programme between Member States' authorities and proposing organisations to agree on clear procedures (e.g. who has to send the interim report to the paying agencies? Is it the proposing organisation of that Member State or the paying agency of the coordinating Member State?).

3. Need for clarification on the level of details required in the submitted programmes

The Commission should clarify that operators have to provide details for the actions foreseen and the budget linked for the first year, and only outlines of actions and budgets for the following years. In

promotion activities it is very difficult to foresee concrete actions and a budget, as conditions in the market can change and operators have to adapt. Although it is important for a programme not to change its target public (consumers, the press, journalists, etc.), it should be allowed to modify specific activities. The 10% tolerance rule of the model contract provides some flexibility but operators are still concerned by the high level of detail requested.

4. Need to improve the work of the Monitoring Group (Article 12 of Regulation 3/2008)

During Monitoring Group meetings, the European Commission or Member States should clarify any doubts and answer any questions that the proposing organisation may have regarding the practical aspects of running the programme. These clarifications and answers should be recorded in the minutes of the meeting.

This matter will remain on the Freshfel agenda. A meeting with the Cabinet of Commissioner Dacian Ciolos is foreseen for mid-June 2010.

EUROPEAN SCHOOL FRUIT SCHEME

The proposal for a European School Fruit Scheme followed an undertaking made during the negotiations on the reform of the Common Market Organisation for fruit and vegetables in June 2007. Consumption of fruit and vegetables is at best stagnating across Europe. In most cases consumption is at a level well below the WHO/FAO minimum recommendation. This level is today fixed by WHO/FAO at minimum 400 gr/day but many experts underline the need to consume at least 700 gr/day. Among the youngest citizens the level of consumption is even more worrying. Research has also shown that families with a lower level of income tend to consume less fruit and vegetables.

The effect of the under consumption of fresh produce, combined with other factors such as an inadequate diet rich in sugar, salt and fats, as well as a lack of physical activity is leading today's society to face in the future a major health challenge with a growing part of the population being overweight or obese. The rise in childhood obesity

is already reaching epidemic levels all across Europe. Nearly a quarter of overweight children are obese and medically at risk of several diseases. In the EU and according to data of the International Obesity Task Force, approximately 22 million children are overweight and around 5.1 million school children are obese. Every year, this figure increases by 400.000. The cost of obesity to the economies of the EU27 as calculated by the same body can now reach €150 billion plus per year.

The European fruit and vegetables school scheme (SFS) can therefore make a real difference, particularly in underprivileged areas. The scheme began at the start of the 2009/2010 school year, and for the school year 2010/2011 there are 25 out of the 27 Member States (all but Finland and Sweden) that have already presented their strategies. European funds worth €90 million every year will pay for the purchase and distribution of fresh fruit and vegetables to schools, based on the distribution of one piece of fruit per child per week during the school



term. This money will be matched by national and private funds in those Member States which chose to make use of the programme, either on a 50/50 basis, or 75/25 in the so-called 'convergence regions', where GDP/capita is lower. Besides providing fruit and vegetables to a target group of schoolchildren, the scheme will require participating Member States to set up strategies including educational and awareness-raising initiatives and the sharing of best practices.

Freshfel has been very supportive of this pan-European scheme from the beginning of the legislative process.

However, now that the second school year of implementation begins, some concerns regarding certain aspects of the implementation of the programme remain:

1. Integrity of the programme:

- a. Nature of products eligible: Health aspects should remain the core of this scheme as they are particularly relevant regarding the eligible products for the programme.



- b. Diversity: Focus should be given to a diversified range of fresh produce. A careful selection of products is of paramount importance to make sure that the youngest consumers change their eating habits, get used to new tastes and textures, while discovering and enjoying a wide diversity of fresh produce.
- c. Frequency: Freshfel advocates for an increase of the budget to make it possible to increase the frequency of supply in schools. It is through repeated tasting and regularity that children will be more likely to make a change of their eating habits.

2. Transparency: There continues to be a lack not only of clarity and detailed information for some national strategies, but also centralised and consolidated information of programmes at EU-level. The sector is eager to contribute and to provide its expertise on logistics, product handling and sorting for the successful implementation of the scheme. Regrettably, until today there is only a limited involvement of the sector by Member States' authorities. The School Fruit Scheme is a unique opportunity for a public-private partnership where all expertise available should be used. Schools, the fruit and vegetables sector, the scientific and health community, programme managers, as well as the national and European public sector all have input and experience to provide for the success of the programme.

3. Communication and Networking: Many communication and networking issues remain pending.

- a. There is indeed little progress with regard to the launch of an EU website to promote the scheme.

A dedicated F&V website could provide information about health benefits and scientific studies on fruit and vegetables, toolkits for teachers and kids, recipes, best practices on SFS across Europe and beyond, links to national programmes, etc. The communication policy should also be fine-tuned to avoid confusing young consumers about the elements of a balanced diet. Freshfel deems critical that the EU accompanying measures remain specific to the fruit and vegetables sector, and not be done in conjunction with the School Milk Programme. At the moment the Commission is implying by the fact that school schemes are available for milk and fruit and vegetables that a balanced diet can be reached by consuming these two product categories alone. However, the rationale, background and overall health objective of both programmes is different, and joint action could be problematic given the fight against the obesity dimension of the School Fruit Scheme.

- b. The Commission should also be fostering networking and the exchange of best practices. Freshfel urged the Commission to set up an expert scientific group as well as a stakeholders' advisory ad hoc committee for regular information exchanges.

The Commission and the Member States should not rest on their laurels as much remains to be done in this respect. Freshfel will continue to contribute and provide constructive criticisms as the reflection of the eagerness of the sector towards a successful implementation of a much demanded and needed programme!

PROGREENS



For the second consecutive year Freshfel has been involved and supporting the work and research of the Progreens Project aiming at promoting fruit and vegetables consumption among schoolchildren in the EU. High intake of fruit and vegetables (F&V) promotes health and contributes to the prevention of chronic diseases. The level of consumption of F&V in Europe is highly variable and consumption by no means reaches the recommended level. In this context, the Progreens project focuses on F&V intake of children and their parents in ten European countries, what affects the consumption and how to increase consumption. The project especially contributes to exchange of best practice in fruit and vegetable promotion. It will furthermore investigate the determinants of F&V intake from gender, cultural, educational and socio-economical perspectives and investigate effective communication and promotion strategies.

The expected results are:

- Estimates of the fruit and vegetable consumption in different European countries;
- Information concerning important psychosocial and socio-demographic determinants of fruit and vegetable consumption among school children in different European countries;
- A set of intervention strategies tailored to be appropriate and effective in promoting fruit and vegetable consumption among school children;

- An increased consumption of fruit and vegetables among the participating target group; and
- A set of recommendations for national and international authorities, commercial and professional groups on best-practices for assessment and promotion of fruit and vegetable consumption.

The PROGREENS project is funded up to €700.000 by the Health and Consumer Protection Directorate General (DG SANCO) of the European Commission. It involves twelve partners, among which Freshfel, from eleven countries (Sweden, Iceland, Norway, Germany, Greece, Slovenia, Portugal, Bulgaria,

Finland, the Netherlands and Belgium), and will run until July 2011. During 2009/2010 several conference calls have taken place to coordinate the work among partners. A physical meeting took place in September 2009 in Sweden and a new one is now foreseen during the second World Congress of Public Health Nutrition that will be held in Porto, Portugal, September 23-25. Freshfel has been actively contributing to this project notably during the phase of intervention design and in communicating about the project. More will be done during the dissemination phase. The objective is that the results of the project become as widely known and understood as possible, and by this to spread evidence-based best practice in fruit and vegetable promotion.



EGEA

EGEA is a unique gathering of scientists researching on the health benefits of fresh fruit and vegetables. EGEA is organised by APRIFEL. Over the years, EGEA has become a well listened and authorised body. In 2010, and as it was already the case in 2007, EGEA was organised in Brussels. Freshfel widely supported the organisation of the event on behalf of the fresh produce sector.

In 2007, EGEA was an eye opener for many policy makers in Brussels in the effort and urgency to set up a European School Fruit Scheme. The scheme was indeed launched several months later with an initial budget similar to the one claimed by EGEA. The call for action by the sector and health associations was therefore well received and translated into concrete policy.

On this background, Freshfel coordinated again on the eve of EGEA 2010 in Brussels a policy briefing together with MEP Esther Herranz Garcia of the European Parliament. Based on consumption data and on the concerns of the impact of the economic crisis, urgent actions to stimulate consumption among certain at-risk populations should be undertaken. Reaching the WHO goal of at least 400 gr/day of fruit and vegetables will indeed require a joint approach that includes programmes that target lower socio-economic groups while reinforcing current schemes. This was indeed the main focus of EGEA 2010.

In line with the EGEA 2007 conclusions and the White Paper "A strategy for Europe on nutrition, overweight and obesity- related health issues", the call for EU actions focused on the following policy area:

Reducing social inequalities in fruit and vegetable consumption

It is important that European Institutions support the inclusion of measures that increase the consumption of fruit and vegetables in lower socio-economic groups in current legislation and in the post 2013 Common Agricultural Policy. Policies and instruments under consideration or recently implemented should move towards providing more "public good" by providing better public health outcomes. Two actions need to be considered:

Food aid to Most Deprived Persons Scheme: Commission Regulation (EC) No. 1146/2007 should include fruit and



vegetables as an eligible product category and allocate 100 million € out of the current 500 million € budget specifically for the purchase of fruit and vegetables.

- ✓ Encourage specific low-income population groups to increase fruit and vegetable consumption: The EU should introduce new financial instruments to stimulate and reinforce Member States' programmes such as fruit and vegetable vouchers for targeted population groups (pregnant women, infants, children, etc.). An EU budget of 350 million € should be considered for a successful action.

Increasing access to and availability of fruit and vegetables in schools

The EU School Fruit Scheme (SFS) is a step in the right direction. The SFS is being implemented in 25 out of 27 Member States. However, additional funding and actions must be taken to reinforce the scheme, namely by:

- ✓ Increasing funding to allow daily distribution throughout the school year
- ✓ Reinforcing the accompanying measures both at European and local level
- ✓ Developing clear criteria for the evaluation of the scheme

As proposed by the European Parliament's Busk report, a 500 million € EU budget would allow Member States to effectively increase fruit and vegetable consumption and change long term eating habits among the young.

Improving information on the health benefits of fruit and vegetables and increasing advertising

Within the food market, the fruit and vegetable sector has limited investment capacity for research, innovation, advertising and marketing. The EU should act as a catalyst for improved communication to European citizens on the benefits of eating more fruit and vegetables. Most European citizens are aware of the health benefits of fruit and vegetables, so communication

should focus on changing attitudes and perceptions towards fruit and vegetables, ultimately leading to changes in behaviour particularly in the most vulnerable members of society.

✓ The EU and its Member States can play an important role in improving communication on the necessity of increasing fruit and vegetable consumption by building an ambitious strategy incorporating the effective use of media. Daily messages aimed at increasing fresh fruit and vegetable consumption could be used, such as information on School Fruit Schemes in Member States, best practices across Europe, information on the 5-a-day campaign and innovative actions to improve the availability and accessibility of fruit and vegetables. Actions should target children and low socio-economic status groups which are particularly vulnerable to the advertising of high fat and high sugar foods. This strategy would require building

partnerships with public television networks and advertisers. An EU budget of 100 million € should be considered for successful action.

✓ Information provision and promotion measures for agricultural products: Commission Regulation (EC) No. 501/2008 should extend the eligibility of the fruit and vegetable programme towards vulnerable groups (low-income population groups, etc.). An appropriate budget should be raised accordingly (e.g. by doubling existing resources to reach 24 Million €).

Freshfel will continue to further support the implementation of these policy recommendations as they could help stimulating consumption in particular with target groups identified as the lowest consumers of fruit and vegetables.

WHOLESALE AND FOOD SERVICES

Increasing consumption should not only be reached by rectifying consumption habits of the young or low socio-economic population groups. More needs to be done to increase consumption by adapting accessibility and availability to a changing lifestyle.

In this respect, Freshfel initiated already a few years ago a review of opportunities in the foodservices sector. The foodservices business in Europe is indeed rapidly growing and represents today 25 billion € of business, with the market remaining diversified and fragmented. Freshfel continued in 2009 to offer members a forum for brainstorming on emerging opportunities for the fruit and vegetables sector in the foodservices business and responding to the specific demands of that sector through meetings of the Wholesale, Distribution and Foodservices Division.

Members have within Freshfel the possibility to exchange views on non-competitive best practices, such as logistics, packaging, technologies, responding to requirements of seasonality/local sourcing and product information, providing added value, specific quality requirements regarding size, ripeness, shelf life, etc. Freshfel also provides information for members how to address the challenges of European



legislation, for example with regard to the School Fruit Scheme, EC guidelines for 'Green Public Procurement', etc.

In 2009/2010 Freshfel was also active to intensify the relationship with the World Union of Wholesale Markets (WUWM) through attending a WUWM annual symposium at Rungis International Market, informal meetings with the WUWM-Secretariat to discuss possible areas of cooperation etc. Wholesale markets remain an important area for Freshfel, with issues like promotion, new distribution channels, sustainability and the relationship between producers and wholesalers being on the agenda.

As convenience is becoming more and more important, many issues will need to be on the agenda of this division to continue to look at opportunities for growth and developing the consumption in all the various segments represented by the foodservice sector.



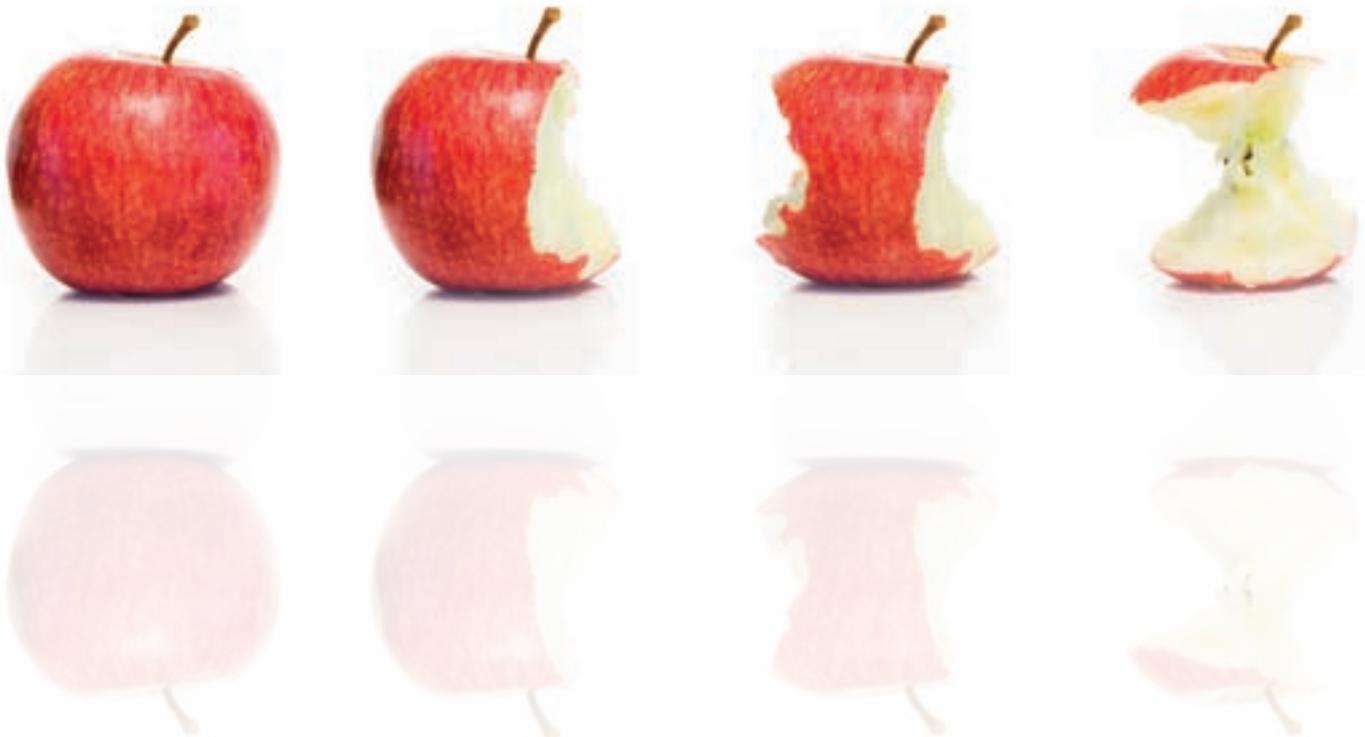
CONCLUSION

This report provides a summary of the main activities conducted by Freshfel during the last twelve months. Most of the issues are evolving and will remain on the agenda in the coming months.

Several issues are becoming increasingly complex and technical. Collectively much progress can be achieved, and with its increased expertise and know-how, Freshfel remains the ideal vehicle for handling the dossiers that can advance the fruit and vegetable sector at European level.

The role of the association will therefore remain of paramount importance in the coming months. Freshfel will more than ever require the full support of all its members, and relies on the unique expertise of the members' representatives in its day-to-day work.

On the basis of this collaboration and despite all the difficulties experienced by the sector in this complex period of financial, economic and employment turmoil, we are convinced that progress can be made to provide the most favourable environment for the sector to take full benefit of all the assets and diversity of fresh fruit and vegetables.



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