

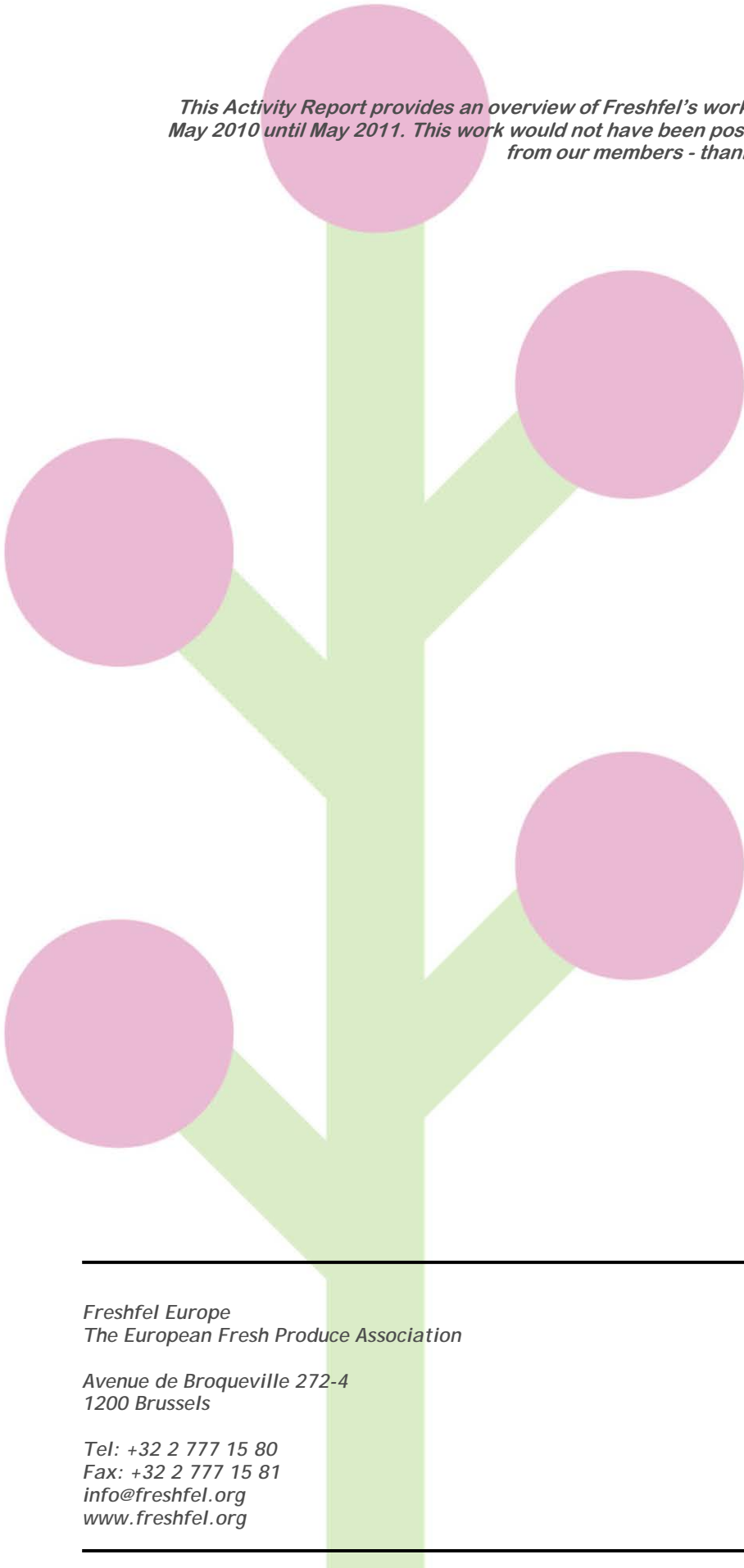
# ACTIVITY REPORT



**freshfel**  
**EUROPE** www.freshfel.org  
THE FORUM FOR THE FRESH PRODUCE INDUSTRY

*Activity Report*  
*May 2010 - May 2011*

*This Activity Report provides an overview of Freshfel's work over the past 12 months, covering from May 2010 until May 2011. This work would not have been possible without the active support and input from our members - thank you!*



[www.freshfel.org](http://www.freshfel.org)

[www.enjoyfresh.eu](http://www.enjoyfresh.eu)

[www.freshquality.org](http://www.freshquality.org)

[www.freshcongress.com](http://www.freshcongress.com)

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**freshfel**  
**EUROPE**  
THE FORUM FOR THE FRESH PRODUCE INDUSTRY

# Table of Contents

Foreword by the President ..... 2



1. Governance ..... 4  
 1.1. *Freshfel Europe* ..... 4  
 1.2. *Mission, Vision and Core Values* ..... 4  
 1.3. *Freshfel Structure and Board* ..... 5  
 1.4. *Freshfel Secretariat* ..... 7  
 1.5. *Freshfel Membership and Benefits* ..... 8

2. Transparency ..... 9  
 2.1. *Publications* ..... 9  
 2.2. *Website and Social Media* ..... 10



3. Networking ..... 11  
 3.1. *Representing the sector* ..... 11  
 3.2. *Connecting the sector* ..... 12



4. Sector developments ..... 13  
 4.1. *Production trends* ..... 13  
 4.2. *Import and Export trends* ..... 14  
 4.3. *Intra-European trade trends* ..... 15  
 4.4. *Consumption trends* ..... 16



5. Freshfel activities 2010-2011: Positioning fresh products to meet consumers evolving demands ..... 18  
 5.1. *Moving towards sustainable production* ..... 18  
 5.2. *Enhancing cooperation with the supply chain* .. 19  
 5.3. *Developing a favourable international trading environment for fresh produce* ..... 20  
 5.4. *Enhancing promotion and communication of fresh produce* ..... 22  
 5.5. *Stimulating consumption of fresh produce* ..... 23



6. Conclusion ..... 25

7. Lists of Members and Associated Members ..... 26



# Foreword by the President



As Freshfel Europe is moving towards its tenth year of operation, the activities of the Association continue to intensify and issues placed on the table of Freshfel are increasingly challenging and complex. In my capacity as President already for the third consecutive year, I have continued to conduct the Association towards clear priorities for the benefit of all. A good spirit of cooperation among the various segments of the sector represented in Freshfel from production down to retailers is for me of paramount importance.

I have also led the association towards an adequate structure and tools to cope with these increased tasks. A dedicated staff and the support of the members are critical to make the difference in our lobbying activities. Additionally, I am also convinced that we could still achieve much more by raising the profile of the Association as well as the image of our products. Several significant steps were taken in that direction in the last 12 months.

This activity report will guide you through the structure of the association, highlighting the long-term mission and vision of the Association, while evaluating our activities during the last 12 months based on our strategic agenda. By reading this report, you will no doubt draw the conclusion that we have at the European level a strong and professional association to represent and voice the interests of our sector with a view of supplying tasty and quality products to consumers.

It remains obvious that the main challenge for our industry today is to stimulate an on-going declining or at best stagnating consumption of fresh produce. The annual Freshfel consumption monitor unfortunately reflects this alarming trend, year after year. The various activities of the Association in the last twelve months have therefore been geared towards that objective by undertaking a press campaign to address our lack of image and address some of consumers' and decision makers' misperceptions about fresh produce. We have launched a dedicated website ([www.enjoyfresh.eu](http://www.enjoyfresh.eu)) and also repositioned the image of our product with a research survey (Where is the fruit?). All these actions gained an overwhelming support by members in recent months. We can be proud of our products. We have a great diversity of produce of high quality and taste available year round in quantity and quality at affordable prices for consumers.

Besides these aspects of communication, Freshfel has continued to be the voice of the sector in a wide range of issues affecting the day to day operations of our companies. Trade negotiations and market access concerns both on export and import, complex food safety legislation developments, the future framework of the agriculture policy, the various soft law initiatives at European level in regard to sustainable production and consumption, the good functioning of the supply chain, and the health and diet initiatives, were some of the headlines of Freshfel's activities, in many cases with achievements reached thanks to the professional support and expertises of the members, being individual companies or national associations.

Many dossiers are ongoing and will continue to be on the association's agenda. I greatly appreciate in this respect the good triangular cooperation between the individual companies, the national associations and the European umbrella association. This network is a good recipe for efficient work in the interest of the sector as a whole.

In my second year of this second term, I will continue, together with my other colleagues at the Board, to move Freshfel forward and to make sure that the Association is focusing on the right priorities that can help us to boost fresh produce sales to consumers, to facilitate the flow of products and to guide our business to the success that it deserves thanks to our great products.

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.

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.

## MISSION, VISION AND CORE VALUES

Freshfel's activities are driven by strong principles and core values, by a clear vision statement and mission.

### The Freshfel vision

The fresh fruit and vegetables sector faces global challenges to move towards sustainable production and consumption. Freshfel Europe cooperates with all its members to stimulate the supply of healthy and tasty products that comply with strict quality, environmental, social and safety requirements, with a view to place the fresh produce sector in a more competitive position, and assist its members satisfying consumer's expectations.

### The Freshfel mission

Freshfel Europe's mission is to be a platform for the European fresh fruit and vegetables sector with a view to enhance the efficiency and competitiveness of its members across the supply chain, from production down to retailing. By facilitating international trade, fostering compliance with the highest safety rules, gearing towards sustainable production and consumption, stimulating research and innovation, and improving the communication and image of the sector and its products, it will create a favourable environment to stimulate long term consumption of fresh fruit and vegetables.

## The Freshfel core values

- Leadership to move the category to success
- Cooperation across the supply chain
- Transparency of lobbying and industry representation
- Responsibility, accountability and ethical conduct
- Professionalism and quality of services towards its members

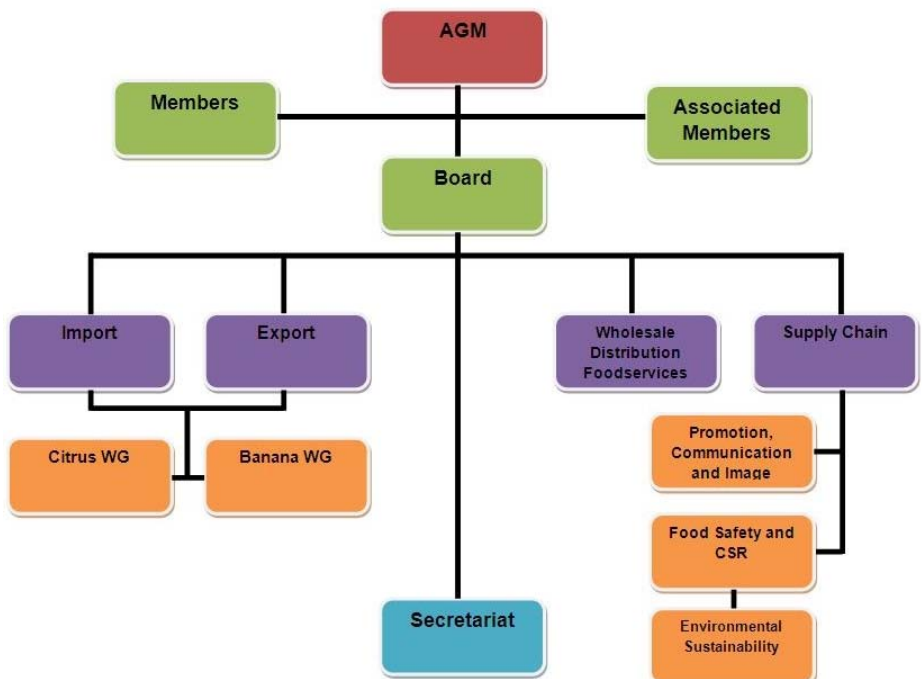
## FRESHFEL STRUCTURE AND BOARD



Freshfel Europe is structured around a Board and four main Divisions. Freshfel's work is also further developed through a series of committees with a dedicated mission such as food safety and sustainability; promotion, communication and image; and product groups such as citrus and bananas. In recent months, and given the technical input required in 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.

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 Committee on Promotion, Communication and Image; the Committee on Food Quality and Sustainability; as well as the Citrus and Banana Working Groups. All Board members are elected for a mandate period of two years, covering 2010-2012.



The current Board took function on the occasion of the Freshfel 2010 AGM on 3 June 2010 held in Brussels.

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 committees, 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 - UNGFL
	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, EUROCOMMERCE, CELCAA, GLOBALGAP, etc. He is also involved in the other Associations hosted by Freshfel, namely WAPA and SHAFFE.
- ✓ **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 supervising the Freshfel Consumption Monitor and coordinating the other Freshfel commitments in the EU Platform for Diet, Physical Activities and Health, including the Progreens project. 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.
- ✓ **Egle Eimontaite** joined the Association in October 2010 and is the Trade Policy Advisor, following in particular the bilateral and multilateral trade negotiations of the EU. Egle also monitors statistics on trade developments, licences and quotas, and contributes to the coordination of the citrus networking between Freshfel and SHAFFE. Egle is also coordinating the yearly Consumption Monitor. Egle also follows customs policy and other market access issues. Within the secretariat, Egle is also following the activities of Europatat.
- ✓ **Sebastian Kruse** is the Communication and Industry Policy Advisor. Sebastian has successfully taken up the coordination of Freshfel's communication policy through revamping the internal communication policy with members and enhancing the external communication with third parties, while launching a social media policy and the "Enjoy Fresh" website. Sebastian 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. Finally, Sebastian is following the activities of SHAFFE, the Southern Hemisphere Association of Fresh Fruit Exporters.



# 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.

## Not yet a member of Freshfel Europe?

Please contact Philippe Binard at the Freshfel secretariat: [info@freshfel.org](mailto: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!

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 expertise 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.

### Representing the European fresh produce sector

Freshfel Europe, the European Fresh Produce Association, is the platform for the fresh fruit and vegetables supply chain, representing the interests of the fresh produce sector at European level. In its day-to-day work the association keeps regular contact with all relevant European Institutions, and the secretariat and members participate on a regular basis in EU Advisory Groups and EU expert committees. Freshfel is representing the voice of the sector at European level together with other organisations such as COPA-COGECA, AREFLH, CELCAA, CIAA, EUROCOMMERCE, etc. and is accredited with the United Nations organisations such as FAO, WHO, UN/ECE and OECD.

### Joining a strong community

Freshfel's strength is built on its membership. Freshfel Europe not only incorporates around 200 companies and national associations of producers, importers, shippers and exporters, distributors, wholesalers, retailers and their service providers such as logistics and reefer transportation, but also seed and crop protection companies. Freshfel's core membership is from EU member states, but also counts with many associated members from around the world.

### Supporting common objectives

Freshfel is operating as a forum for the fresh produce sector and represents a platform where matters of common concern are tackled. The broad objective of Freshfel is to increase the consumption of fresh produce, which can be done in many ways. 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, environmental and CSR rules/standards

- Secure a favourable environment to promote the benefits of fresh produce, and increase the efficiency of promotion activities within Europe and beyond and share best practices
- Position the sector in the new research and innovation policy
- Stimulate the consumption of fresh fruit and vegetables by defending the image of the product and emphasising its healthy assets as well as its huge diversity of taste and texture and recommend to enjoy while eating fresh produce

# Transparency

## 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 weekly *Freshfel Press Review* published each Monday features summaries of international press articles that are of interest to the fresh produce business.
- ✓ Freshfel has also introduced *Thematic Fact Sheets* for its members on a series of topics, which are published given a specific event or development and regularly updated. 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. The *Fresh Times* publication is disseminated to around 1.000 contacts within Europe and beyond.



- ✓ Freshfel also publishes its *Freshfel Headlines* on a bi-monthly basis to outline key activities and positions to the public and private sector. The Headlines are also 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 (committees, conferences, presentations, etc.) and statistics (trade and production). They also aim at creating 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 its activities. The main developments during the last year in this respect have been as follows:



- ✓ In 2011, Freshfel launched a new website dedicated to the assets of fresh produce. The new website is accessible at [www.enjoyfresh.eu](http://www.enjoyfresh.eu). On the occasion of the launch of the website, members underlined that this was a much expected tool which provides access to a wealth of positive information about fresh produce with a few clicks.
- ✓ The association's official website is accessible at [www.freshfel.org](http://www.freshfel.org). In 2010, the Freshfel website was completely revamped. It is linked to an Extranet for improved communication with members. While in July 2009 Freshfel's website was visited by around 5.000 people per month, now (April 2011) the Freshfel website is visited by around 10.000 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 also access to the *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](http://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. The website has over 3.500 visitors per month.
- ✓ To adapt to social media developments, Freshfel has its own *Facebook* page. This is being 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](http://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.



To increase Freshfel's visibility, Freshfel once again had a booth at this year's 2011 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 2012.



## Networking

### REPRESENTING THE SECTOR



Freshfel Europe regularly cooperates with the European Commission and other EU institutions as the European representative organisation for the fresh produce sector. 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 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.



Since February 2009, upon proposal of Freshfel, Pino Calcagni (Besana Group/Fruit Imprese) 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 was 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. In April 2011, Pino Calcagni was re-elected as chairman for another mandate of two years.

Freshfel also submitted the candidature of Luciano Trentini (CSO) in February 2011 as forthcoming chairman of the EU Advisory Committee on Promotion of agricultural products. Luciano was elected by the group for a period of two years. Freshfel was already actively involved in this group, holding a position of vice chairman with Laurence Swan.

Finally, Freshfel also successfully appointed a representative in the EFSA working group on emerging risks. Mr Arie Van der Linden (The Greenery) is representing the voice of the sector in this important committee.

Besides the official representation of the sector in public forums, Freshfel (through the secretariat or its experts) has also represented the voice of the sector or reported the activities/position of the association in several official committees of the European Commission, as well as in other business fora.

## CONNECTING THE SECTOR



Freshfel is also a unique place for professional networking. Freshfel meetings are consistently 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 priorities 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 2010, Fresh was organised in St Petersburg. The conference looked more into detail at the rapid developments of the Russian market and at the evolution of requirements for the supply to this increasingly demanding market. Close to 250 delegates participated in this event.



In 2011, Fresh is returning to the Netherlands, to Rotterdam more specifically, one of the key hubs for fresh produce in Europe.

## 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 – at the same time exporting more than 4.4 million T to third countries.

## PRODUCTION TRENDS

Based on 2009 data, European fresh fruit production is slightly below 37.7 million T. The apples and pears category represents 33.8% of the production, citrus almost 20%, stone fruits around 19% and table grapes around 7%. 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 29% and 24% of all EU production respectively. European vegetable production has declined to reach around 41 million T, cabbages and cauliflowers are being the largest product group with 17.2% of the volume followed by onions, shallots, garlic and leeks which represent 12.6%. The main vegetable producing countries include Italy, Spain, France and Poland.

## INTRA-EUROPEAN TRADE TRENDS

While a significant part (61%) 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 26.6 million T of produce being exchanged every year between Member States out of a total production of 78.6 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

	Inta EU F&V Imports - Volume (tonnes)			Inta EU F&V Exports - Volume (tonnes)		
	2008	2009	2010	2008	2009	2010
Austria	797.951	754.622	789.152	357.027	384.672	400.185
Belgium	1.602.508	1.561.553	1.531.143	2.933.130	2.990.999	2.827.024
Bulgaria	78.108	97.456	144.417	34.909	46.674	40.145
Cyprus	25.837	30.498	34.307	48.273	39.761	42.847
Czech Republic	1.002.308	1.042.701	1.090.850	199.014	215.578	250.291
Denmark	647.732	650.925	664.617	40.554	38.661	47.089
Estonia	100.165	105.250	91.064	2.409	2.148	2.011
Finland	316.015	319.688	310.131	1.665	1.278	1.359
France	3.367.183	3.395.118	3.380.710	1.921.733	1.925.181	2.020.356
Germany	6.956.556	6.616.266	6.735.767	1.330.511	1.067.834	1.145.696
Greece	187.875	173.048	134.390	581.261	602.296	766.305
Hungary	317.748	266.510	250.165	234.147	236.399	234.301
Ireland	335.009	338.872	335.368	110.392	82.648	74.133
Italy	1.127.284	1.365.934	1.136.456	2.973.906	2.843.008	3.320.814
Latvia	145.393	138.515	93.607	9.225	16.195	19.145
Lithuania	587.388	410.600	485.548	48.216	57.424	55.407
Luxembourg	55.855	51.217	50.968	3.213	4.021	5.082
Malta	24.309	25.087	15.428	50	0	-
Netherlands	1.771.517	1.863.364	1.741.993	5.495.279	5.593.331	5.220.943
Poland	1.452.313	1.323.902	1.340.964	897.613	692.624	548.532
Portugal	481.573	503.881	440.175	302.214	326.769	272.898
Romania	252.605	210.327	238.448	19.635	44.021	79.176
Slovakia	425.817	816.679	409.638	71.515	52.179	255.843
Slovenia	189.873	186.668	180.803	99.916	119.292	123.753
Spain	917.852	929.946	921.638	8.628.333	8.666.170	9.135.448
Sweden	781.630	743.755	779.154	52.290	69.659	59.157
United Kingdom	2.889.000	2.647.032	2.770.155	192.754	227.888	226.473
<b>Total:</b>	<b>26.837.405</b>	<b>26.569.415</b>	<b>26.097.055</b>	<b>26.589.185</b>	<b>26.346.710</b>	<b>27.174.412</b>



## IMPORT & EXPORT TRENDS

The import from third countries into the EU declined in 2010. Total fruit imports in 2010 represented 10.6 million T worth 8,6 billion €, while vegetable imports represented 1,7 million T worth 1,8 billion €. Bananas are the largest fruit category imported into the EU with 4,5 million T, followed by oranges (922.000 T), pineapples (898.000 T) and apples (595.000 T).

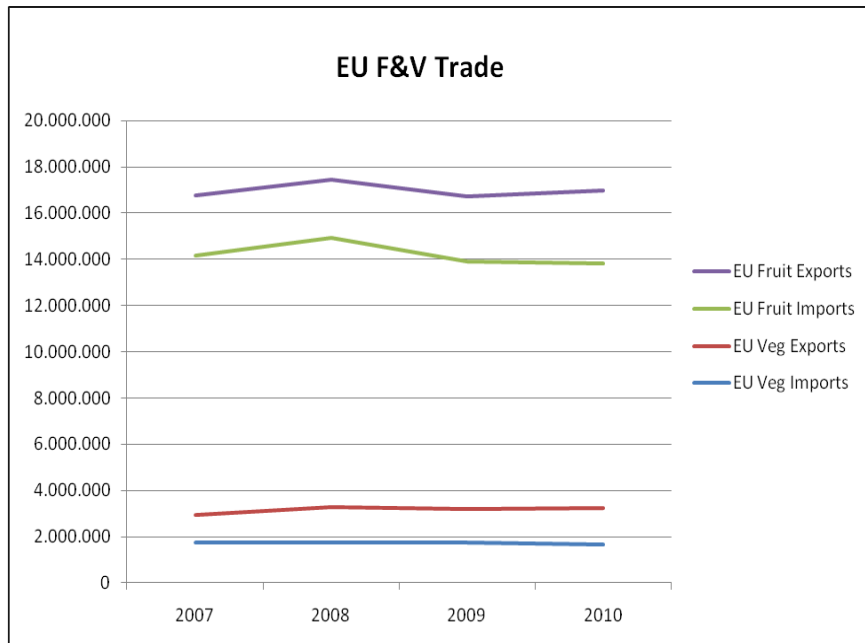
Exports increased in 2010 mainly due to the strong demand from the Russian market. The exports to Russia of fresh fruit increased by 17.9% and of fresh vegetables by 37.6% compared to the previous year. Exports amounted in 2010 to 4,7 million T worth 3.9 billion €. The main exported categories included apples (1,2 million T) and onions and shallots (701.000 T).

Source: Eurostat

	EU-27 Imports by Volume (tonnes)				EU-27 Exports by Volume (tonnes)			
	2007	2008	2009	2010	2007	2008	2009	2010
Bananas	4.706.956	4.920.126	4.560.050	4.544.911	14.205	15.853	14.196	13.532
Exotics	1.676.950	1.816.840	1.714.457	1.749.763	240.044	247.222	270.137	323.407
Citrus	2.157.775	2.311.635	2.015.818	2.126.665	658.145	561.878	590.526	637.719
Grapes	611.042	649.214	616.067	558.939	136.709	155.902	121.784	130.934
Melons & Papayas	552.010	581.385	520.405	518.914	64.483	70.532	77.013	88.149
Apples & pears	1.275.852	1.144.139	1.070.061	870.238	1.193.295	1.109.174	1.390.912	1.570.802
Stone Fruit	196.687	179.219	172.964	138.656	256.709	280.108	305.466	368.981
Berries	67.539	69.493	69.591	64.045	27.748	36.598	43.895	47.819
<b>Total:</b>	<b>11.244.811</b>	<b>11.672.050</b>	<b>10.739.413</b>	<b>10.572.131</b>	<b>2.591.338</b>	<b>2.477.266</b>	<b>2.813.928</b>	<b>3.181.343</b>

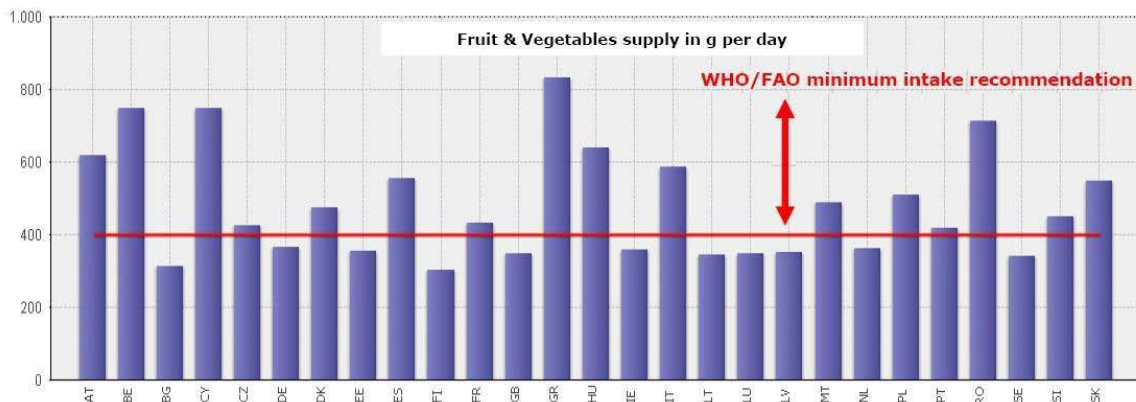
Source: Eurostat

	EU-27 Imports by Volume (tonnes)				EU-27 Exports by Volume (tonnes)			
	2007	2008	2009	2010	2007	2008	2009	2010
Totatoes	450.783	448.425	510.121	477.148	176.306	220.614	167.554	158.957
Onions & Garlic	530.952	467.180	349.642	378.191	410.216	581.422	681.362	714.158
Cabbages & Cauliflowers & broccoli	21.360	11.670	9.462	13.069	148.791	218.276	142.156	170.247
Lettuce & Chicory	7.115	5.809	7.032	9.031	47.104	50.754	48.877	51.470
Carrots & Turnips	53.526	58.526	108.729	82.362	85.757	138.202	69.086	126.278
Cucumbers & Gherkins	29.464	32.399	41.256	32.922	41.958	47.127	37.949	38.156
Legumes	194.202	200.526	188.933	190.203	19.948	18.715	4.642	7.215
Other Vegetables	478.805	506.345	534.278	489.845	232.488	274.385	279.285	292.108
<b>Total:</b>	<b>1.766.208</b>	<b>1.730.879</b>	<b>1.749.453</b>	<b>1.672.770</b>	<b>1.162.568</b>	<b>1.549.494</b>	<b>1.430.911</b>	<b>1.558.589</b>



## CONSUMPTION TRENDS

This year Freshfel Europe released a PDF 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 2009, total net supply of fruit per capita stands on a yearly basis at 91.3 kg (compared to an average of 96,4 kg over the previous five years), while the total yearly net supply of vegetables per capita stands at 83.8 kg (compared to an average of 94.9 kg over the previous five years). This represents a decrease of net supply in 2009 of 3.2% for fruits and a decrease of 11.3% for vegetables when compared to the average of the previous five years. Considering the evolution of the EU population from 488.8 million in 2004 to 499.7 million in 2009, the per capita consumption of fresh produce also decreased by 5.2% for fresh fruit and by 11.7% for fresh vegetables.

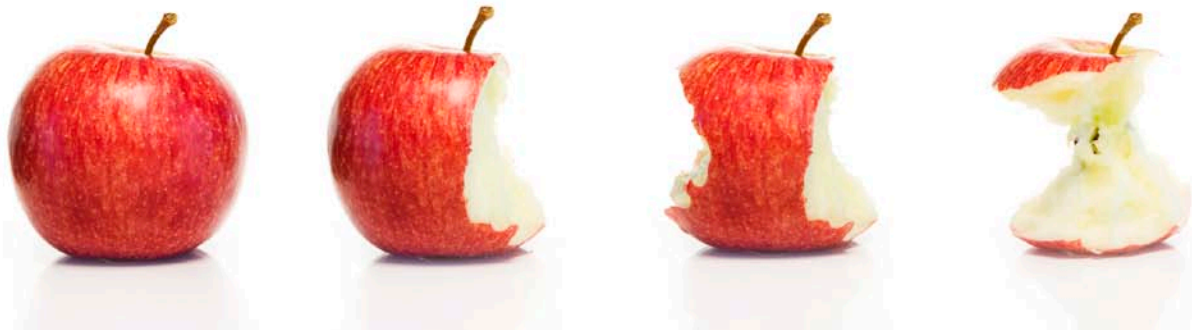


The data confirms the alarming trends of a stagnating or even declining consumption of fresh produce. The Consumption Monitor also shows that the situation varies significantly from one Member State to another. On average, the trend indicators in the monitor signal as in the previous years that a bit less than half of the EU Member States are below or just above the 400 grams a day, the minimum intake recommended by the World Health Organisation. The situation is not any better in the countries analysed outside the EU, except for Switzerland. 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 eight edition of the report, covering the period 2004 to 2009.



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 €500.



# Freshfel Activities 2010-2011

## Positioning fresh produce to meet consumers evolving demands

The Freshfel activities in 2010/2011 are driven by an ambition to position fresh produce to meet consumers evolving demand. Freshfel is therefore orienting its activities towards actions that can reach this objective. The main driver of our activities is therefore gearing fresh produce towards

- Sustainable production
- Enhancing cooperation in the supply chain
- Develop a favourable international trading environment
- Enhancing communication and image
- Stimulate consumption

### MOVING TOWARDS SUSTAINABLE PRODUCTION



In today's environment, the production of fruit and vegetables should permanently adjust to cope with the rapidly evolving demands of the market, and to match the highest quality and taste requirements expected by customers and consumers. Growers should cope with the new legislation of sustainable use of pesticides and comply with the new limits of the legislation on active substances. The use of plant protection products should be appropriate and following the principle of "as little as possible but as much as necessary", but it remains crucial that a large variety of tools should be available to cope with sustainable production principles. Besides, safety, environmental, or social aspects are increasingly complex and require consistent and proactive response

from the sector while seeking harmonisation and avoiding proliferation of private standards. Clear rules and requirements are of paramount importance to gain consumers confidence and limit exposure to emotional NGO campaigns. Finally climate change is exposing production to more extreme and unexpected climate conditions. This phenomenon is likely to continue and might have an impact on the future availability of products. Changing patterns and security of supply is therefore an issue that needs to be anticipated for its possible far reaching implications.

Against this background, Freshfel is gearing to get authorities to be proactive in supporting its legislation, namely in the area of food safety, which is in Europe one of the strictest and most advanced at international level. This must be reflected in consumers' perception about the safety of products. Freshfel coordinates sector positions and assists its membership to cope with a demand driven production by addressing areas such as:

- i. food safety requirements: assist membership to cope with clear tools and criteria, and avoid proliferation of schemes which could confuse consumers and secure that food safety is not becoming subject of competition between operators. Particular dossiers included to keep pace of the revision of active substance registrations and find solutions for minor uses as well as the ongoing revision process of EU harmonised MRLs. Freshfel also embarked in the ACROPOLIS project under the 7<sup>th</sup> EU research programme focusing on cumulative effects of pesticides residues. In the last year several dossiers linked to the EU food additives legislation were also swiftly addressed by Freshfel.
- ii. environment and climate change requirements: raise awareness among the industry about sustainable practices (water, energy, soil, waste, etc). Dedicated workshops were hold while providing a wealth of information to members. The climate change debate and ecological footprint might represent a significant asset for fresh produce compared to other food categories.
- iii. social requirements: provide a clear approach for compliance is one of the priorities. Information and exchange on best practice were provided. It is important for the sector that these requirements are clarified into a clear concept and that the sector will not be confronted with a proliferation of schemes.
- iv. quality requirements: provide clear components of quality for external appearance to organoleptic criteria and request from the chain to focus even more on taste.
- v. varietal innovation: keep pace of new techniques which could lead to new varieties that meet consumers expectations, while securing confidence of consumers.
- vi. risk management: this last exercise year was important to demonstrate the good functioning of the Freshfel network in case of crisis, including both risk management and risk communication aspects. Preventing crisis requires a good network within the industry, be in a position to provide timely factual information and work constructively and in a transparent format with the sector as well as public authorities. As EFSA is calling for a more proactive sector, these tools will be an asset and have been reported in the EFSA working group on emerging risks. Freshfel should also be a platform of coordination among members operating monitoring tools.

## ENHANCING COOPERATION WITHIN THE SUPPLY CHAIN



The supply chain is facing a period of dramatic change with concentration and evolving business patterns. The sector remains confronted with significant discrepancies between a heavily fragmented supply base versus a heavily concentrated demand side. Rising costs and severe competition are affecting return across the chain and even putting at stake the viability of the production and hence, in a more global environment, also the security of supply, one of the basic pillars of the CAP. Increasing the value of fresh produce should assist in moving to sustainability and profitability across the chain. The fresh produce supply chain is structured according to different segments which all play an essential role in the business for enhancing or preserving the quality and to guarantee to consumers a wide diversity of fresh products all year round. These functions are essential and their benefit is often

overlooked by those considering short networks or direct sourcing as the only way forward. The fresh produce sector more than any other is heavily relying on the quality of its personnel. Several initiatives are taken across Europe to value the sector towards young talents and develop an efficient recruitment policy. National initiatives and best practices should be shared at European level.

Under this background, Freshfel represents for its membership a unique platform for the fresh produce sector, and a forum to enhance cooperation across the chain. Several initiatives are underway and should be highlighted by:

- i. contribute to the debate at European level on the good functioning of the supply chain and consider existing tools that are available within the CMO to facilitate the efficiency of the chain (concentration of production, crisis prevention, inter-branch, etc). In the last months, a European debate was launched on the “good functioning of the supply chain”. This debate has also a prolongation at national level.
- ii. seek initiatives that can enhance the added value of the product and increase the efficiency of the chain in areas such as logistics, packaging, etc. Freshfel is a platform where technical aspects can be addressed among operators in the chain, looking for improved efficiency, best practices, while keeping pace of innovation. Freshfel joined in 2010 the IFPS (International Federation for Produce Standards) with a view of seeking greater coordination internationally on standards issues.
- iii. provide analysis of market development and consumption trends with the support of the membership, but always undertaking these initiatives by strictly adhering to the full compliance of competition and antitrust law. Freshfel released in 2011 its annual consumption monitor with a wealth of information about production, trade and consumption in the EU-27 as a whole and the 27 Member States individually. Freshfel also seeks evaluating the state of the sector and conducted for the Fruitlogistica meeting a survey on import and export trends at a time that security of supply is an issue gaining momentum.
- iv. more generally, the aspect relating to a sustainable production and consumption needs to be addressed from a supply chain perspective to consider efficient solutions on a wide range of issues (GAP, GDP, environmental practice, waste management, etc). Freshfel also collaborates closely with GlobalGAP and in particular the Crop Protection Working Group.
- v. Freshfel is still holding the Presidency of the European Commission Advisory Committee on fruit and vegetables as Pino Calcagni was re-elected in April 2011 for a new term of two years as Chairman of this Committee. The Advisory Committee Fruit and Vegetables is a platform for growers, processors, traders and consumers’ representatives to meet and discuss with the Commission policy matters of concern for the sector.

## **DEVELOPING A FAVOURABLE INTERNATIONAL TRADING ENVIRONMENT FOR FRESH PRODUCE**

Globalisation is having year after year a more important impact on trade, and the European fresh produce sector should position itself to keep pace of worldwide evolving consumer demands and to open up to new markets. A favourable trade environment should be built on the basis of fair and reciprocal trade opportunities both for import and export. On the one hand, Europe should remain an attractive market for third countries to secure European consumers with a wide

choice of quality products and with a high diversity. As emerging markets are becoming increasingly attractive for third country suppliers, the European market should not be impaired by unnecessary market access conditions or unharmonised controls which affect the trade flow. On the other hand, some emerging markets are rapidly growing and increasing their demand for fresh produce. The European exporters should be placed in a favourable condition to take their share on this development outside the EU market. Moreover, being importers or exporters and/or working outside the Euro Zone, means for the fresh produce sector with its limited margins to be more and more exposed to the erratic currency fluctuation, which affects reliability and profitability of operations. An appropriate toolbox to stimulate exports should be available to conquer new markets as European exporters remain affected on the one hand by the strength of the Euro and on the other by complex and unnecessary barriers.



On this background, Freshfel closely monitored the multilateral and bilateral trading environment, securing a favourable place for fresh produce in these international negotiations. Tariff and non tariff barriers should be dismantled in a spirit of reciprocity and to facilitate the trade of products that have particular features of freshness, perishability, and provide a healthy option to consumers worldwide. A stable environment (based on sound science and a stable currency environment) should be sought for business development in regard to international trade. Among the key developments of the last 12 months one could highlight:

- On-going monitoring of the WTO development namely the discussion on the DOHA round but also the accession process to the WTO of the Russian Federation.
- Voice the benefit of reciprocity and a greater consideration of fresh produce in EU priorities for fresh produce to be exported to third countries in bilateral agreements. The last twelve months witnessed a multiplicity of progresses for several key partners of the EU such as most of the countries in the Mediterranean basin, South Korea, Andean and Central American countries, etc. Other negotiations remain open namely with India, Ukraine, Mercosur, South Africa and some EPA countries. In all of these agreements, Freshfel aimed at securing a good favourable environment for fresh fruit and vegetables while fostering place for reciprocity.
- Freshfel coped successfully within reasonable time limit to address complex cases such as those of morpholine or CCC. While these cases had a significant impact on trade, Freshfel's role has been to liaise with authorities and the sector to learn the lessons of these cases and look for solutions both on the short and on the long term.
- The central attention of the association remained on Russia, cooperating closely with the European Commission on this dossier. Harmonization of MRLs, monitoring safety certificates and seeking their removal when justified by records, assisting members with laboratory registrations, etc. Freshfel was present in Russia with its annual conference Fresh organised in April 2010 in St Petersburg in partnership with Eurofruit Magazine. Together with the European Commission, Freshfel was also present at the World Food Moscow and participated to a workshop of DG AGRI highlighting the assets of European products on the Russian market.
- The issue of official controls remains a point of concern and embraces several aspects including namely the need for a greater homogeneity of controls upon import, the collection of fee for controls in a manner that does not lead to distortion of trade flows, as well as the managing of the new rules regarding emerging risks countries.

- Freshfel also pioneered in 2010 the coordination of a first ever joint protocol for exporting apples and pears to the USA. The protocol is aiming at setting the practical rules to cope with current requirements of the USA for exporting apples and pears originating from 6 Member States of the EU including the Netherlands, Belgium, France, Italy, Spain and Portugal. Separately, Freshfel also assisted members in their market access dossiers to third countries.
- Freshfel has also dedicated focus groups on citrus and bananas, which are a place for exchange and networking about trends and topics of common concern.

## ENHANCING PROMOTION AND COMMUNICATION OF FRESH PRODUCE

Fresh produce has a number of assets that are difficult for consumers to recognise and to be translated in concrete buying attitudes. Fresh produce is often competing with other sectors which sometimes take benefit of the positive image of fresh produce while enjoying more significant marketing budgets. A bulk of scientific studies demonstrates the healthy benefits of consuming fresh produce, but the sector and public authorities hardly take advantage of the findings of these studies to communicate. Reinforced public private partnerships should be set up to remedy this situation. While some tools are available at European level to promote fresh produce, those should be further developed and adjusted in close cooperation with the sector to meet expectations and react rapidly to market needs. Within the sector, more cooperation is also needed to further streamline actions of the existing “5 a day”-alike initiatives, which remain fragmented and are lacking a pan-European perspective. Consumers remain confronted with a large number of questions in regard to growing conditions, safety, global warming impact, social aspects, seasonality and local sourcing. On most of these parameters, fresh produce has positive records which need to be communicated adequately and appropriate on the various EU-27 markets.



Against this background, Freshfel aimed at enhancing the fresh produce category to take full benefits within the sector of the health, the nutritional or other “immaterial” values of fresh produce. A close public private partnership is desirable and fostered by Freshfel as well as a reinforced alliance between the sector, the scientific community and health organisations to compensate the limited financial resources available in the sector compared to other competing agrifood sectors. Freshfel advocated in all fora for a stronger promotion budget at EU level, that both on the internal market as well as on third country markets should be required to position fresh produce but also to address some of the major health challenges such as the alarming increase of obesity or the development of chronic diseases. Communication campaigns with a particular focus on price and value, protecting the image and highlighting assets were core drivers of Freshfel actions and activities in developing a centralised source of information to be available to inform consumers and decision makers about the benefits of consuming fresh fruit and vegetables. Freshfel therefore took a number of concrete steps in the last year including:

- A comprehensive press campaign running from February 2011 to May 2011 with 8 communications on key



topics and features for the sector, reinforcing to the general audience the image of the sector, highlighting the assets of fresh produce and profiling the association.

- The launch of a unique website “Enjoy Fresh” ([www.enjoyfresh.eu](http://www.enjoyfresh.eu)) encompassing all the key data to better profile fresh produce. Freshfel will continue to profile its ‘Enjoy Fresh’ concept to move it to a recognised platform of networking and communication for the sector at European level. The Fresh Times and the Freshfel Headlines remain also well appreciated instruments of communication both for fresh products and best practices in promotion initiatives, as well as for the image of the organisation.
- Freshfel conducted a survey named “Where is the fruit”, investigating the actual fruit content of fruit in a series of competing agrofood products which depicted the image of fresh produce on their packaging or on the use of words. This first kind of survey was very popular, gained success among the press and is also a solid report for the on-going debate on nutrition profiles and on the protection of the image of fresh produce. More is expected in the coming months on the nutrition and health claims policy as well as on the nutrition labelling dossier.
- Initiatives to liaise the scientific community with the fresh produce sector. Freshfel is part of research projects such as Acropolis (on multi-residues) but also Progreens (on nutrition in school children) and supported also the EGEA conference in Brussels.
- EU Platform for Diet, Physical Activity and Health: Freshfel remains active in this forum, profiling fresh produce as one of the solutions to address the alarming growing rate of obesity and related illnesses.

WHERE  
IS THE  
FRUIT?



## STIMULATING CONSUMPTION OF FRESH PRODUCE

Consumption levels are not matching the WHO minimum consumption recommendation of 400 g/day in most of the Member States. At the same time, consumers have rapidly evolving expectations given changing lifestyles, aspiration for convenience, stable quality and tasteful products at the “best price”. A close monitoring of consumption trends to allow benchmarking and analysis of the state of play is needed. The Freshfel consumption monitor is in this respect a useful tool for the membership as well as an element for lobbying public authorities on the need towards a more proactive role to stimulate consumption.

On this background, Freshfel is permanently considering undertaking all the necessary initiatives to stimulate the consumption above the minimum recommended level of the WHO. There are significant margins of actions to better position fresh fruit to consumers (in new segments through food services at large, more convenience at retail level, secure the supply of tasty and stable quality product, etc). Existing tools directly influencing consumption (school fruit scheme, most deprived person’s scheme, generic promotion scheme, etc.) should be reinforced in close cooperation with the sector. The upcoming CAP reform provides a favourable momentum. In the meantime Freshfel has continued to

take steps to assist the sector in operating in the most favourable environment to allow the stimulation of a at best stagnating consumption. Actions included:

- The release of the annual Consumption Monitor.
- The steps to protect the image of fresh produce and the campaign as described above to profile the manifold assets of fresh produce.
- The on-going support to the School Fruit Scheme and other similar initiatives (e.g. focusing on the most deprived persons).
- The support to a healthy lifestyle at the workplace, namely by stimulating members to have the Freshfel Charter in place in their company aiming at providing fresh fruit and vegetables at the reception or during meetings.
- The follow up of the European promotion policy, calling for an even more ambitious promotion instrument at EU level. This would lead the EU to launch a Green Paper in July 2011 with a view of reforming the scheme. At this particular crucial moment, Freshfel took the lead of the EU promotion Advisory Committee with the appointment of Luciano Trentini as President of the group.

# 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 the 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.



## LIST OF FRESHFEL MEMBERS AND ASSOCIATED MEMBERS

*AEL, Great-Britain\**  
*AFRIKANISCHE FRUCHT-COMPAGNIE GmbH, Germany*  
*AGRO ALIANS, Poland*  
*AGROFRESH, a division of ROHM and HAAS FRANCE SAS, France\**  
*AILIMPO, Spain*  
*ALARA, Turkey*  
*ANDRETTA FRUCHTIMPORT GMBH, Germany*  
*ANECOOP, Spain*  
*ANECOOP FRANCE, France*  
*ANECOOP POLSKA, Poland*  
*ANECOOP PRAHA, Czech Republic*  
*ANEEFEL, France*  
*ANTON DÜRBECK, Germany*  
*ANTONIO MUÑOZ & CIA, Spain*  
*ANTWERP PORT AUTHORITY, Belgium*  
*APEFEL, Morocco \**  
*ARC EUROBANAN, Spain*  
*ASERCA, Mexico\**  
*ASOEX, Chile\**  
*ASSOCIATION NATIONALE POMMES ET POIRES, France*  
*ABPM (ASSOCIAÇÃO BRASILEIRA DE PRODUTORES DE MACA), Brazil \**  
*ASSOMELA, Italy*  
*AZ FRANCE, France*  
*BAMA GRUPPEN, Norway*  
*BANANA KOMPANIET, Sweden*  
*BATTAGLIO SRL, Italy*  
*BE FRESH, Belgium\**  
*BELFRUCO, Belgium\**  
*BELGIAN NEW FRUIT WHARF, Belgium\**  
*BESANA SPA, Italy*  
*BEST FRESH GROUP, The Netherlands*  
*BLUE WHALE S. A., France*  
*BORD BIA - THE IRISH FOOD BOARD, Ireland\**  
*CAESPAN INTERNATIONAL, United Kingdom*  
*CAESPAN PTY. LTD., South Africa\**  
*CEROZFRUCHT s. r. o., Czech Republic*  
*CHIQUITA INTERNATIONAL SERVICES GROUP NV, Belgium*  
*CITRONAS, The Netherlands*  
*CITROSOL PRODUCTOS SA, Spain\**  
*COFRES SRL, Italy*  
*COMISION HONORARIA NACIONAL DEL PLAN CITRICOLA, Uruguay \**  
*COMPAGNIE FRUITIERE (UK), LTD., Great-Britain*

**COMPAGNIE FRUITIERE PARIS**, France  
**COMPAGNIE FRUITIERE**, France  
**COOPERATIVE TELERSVERENIGING PROMINENT** , The Netherlands  
**COOP TRADING A/S**, Denmark  
**CSIF**, France  
**CSO - CENTRO SERVIZI ORTOFRUTTICOLI**, Italy  
**CULTIVAR BARCELONA**, Spain  
**CULTIVAR MADRID S.L.** , Spain  
**CULTIVAR PALMA, S.L.** , Spain  
**CYPROFRESH CITRUS SEDIGEP**, Cyprus  
**CYPRUS EMPLOYERS' ASSOCIATION OF PACKERS AND EXPORTERS OF CITRUS AND GRAPES**, Cyprus  
**DEL MONTE HOLLAND BV**, The Netherlands  
**DECCO IBERICA POST COSECHA**, Spain  
**DEL MONTE FRESH PRODUCE**, Poland Sp. Zo.o.  
**DEPARTMENT OF MARKET RESEARCH - AGRICULTURE**, Israel \*  
**DFHV - DEUTSCHER FRUCHTHANDELSVERBAND**, Germany  
**DOLE EAST EUROPE**, Czech Republic  
**DOLE EUROPE IMPORT**, Belgium  
**DOLE EUROPE SA**, France  
**DOLE FOOD ESPAÑA**, Spain  
**DOLE FRANCE**, Rungis, France  
**DOLE FRESH FRUIT EUROPE**, Germany  
**DOLE ITALIA**, Italy  
**DOW AGRO SCIENCES LTD.**, Great-Britain\*  
**DUTCH PRODUCE ASSOCIATION (DPA)**, Barendrecht  
**EDEKA AG Fruchtkontor**, Germany  
**ENZAFOODS**, Hastings, New Zealand\*\*  
**ENZAFRUIT (CONTINENT)**, Belgium  
**ENZAFRUIT**, Nelson, New Zealand\*  
**EACCE (ETABLISSEMENT AUTONOME DE CONTRÔLE & DE COORDINATION DES EXPORTATIONS)**, Morocco \*  
**EURO FRUITS PVT. LTD.**, India\*  
**EUROFRUTAS SA**, Portugal  
**EXOFARM**, France  
**EXPOFRUT S. A.** , Argentina\*  
**FEDEFRUTA**, Chile \*  
**FEDERCITRUS**, Argentina \*  
**FLANDERS COLD CENTER**, Belgium\*  
**FORUMPHYTO**, France  
**FRESCA GROUP LTD.**, United Kingdom  
**FRESH PRODUCE CONSORTIUM**, United Kingdom  
**FRESH PRODUCE EXPORTERS FORUM**, South Africa\*  
**FRESH TRADE BELGIUM**, Belgium  
**FRESHTRO FRUITS**, India  
**FRUCHTHANSA**, Germany  
**FRUCHTHOF MEISSEN GMBH & CO.**, Germany  
**FRUCHTUNION WIEN**, Austria

**FRUGI VENTA - GROENTEN EN FRUIT HANDELSPLATFORM NEDERLAND**, The Netherlands  
**FRUITIMPRESE - ASSOCIAZIONE IMPRESE ORTOFRUTTICOLE**, Italy  
**FRUIT SOUTH AFRICA**, South Africa  
**FRUTTITAL DISTRIBUZIONE**, Italy  
**FRUTTITAL ESPAÑA**, Spain  
**FYFFES BV**, The Netherlands  
**FYFFES GROUP LIMITED**, United Kingdom  
**FYFFES INC.**, USA  
**FYFFES PLC**, - Dublin -Ireland  
**FYFFES PLC**, - Dundalk - Ireland  
**GF GROUP SPA**, Italy  
**GRANDS DOMAINES DE MAURITANIE**, Mauritania\*  
**GRANDS DOMAINES DU SENEGAL**, Senegal\*  
**GREENCELL LTD.**, Dartford -United Kingdom  
**GREENCELL LTD.**, Spalding, United Kingdom  
**GREENERY INTERNATIONAL**, The Netherlands  
**GRUPO FERNANDEZ SA**, Spain  
**GRUPO YES**, Spain  
**HAGÉ-INTERNATIONAL**, The Netherlands  
**HAMBURGER HAFEN- UND LAGERHAUS**, Germany \*  
**HART & FRIEDMANN**, United Kingdom  
**HERMANOS FERNANDEZ LOPEZ SA**, Spain  
**HUNGARIAN FRUIT AND VEGETABLE BOARD**, Hungary  
**INDIGO FRUIT SAS**, France  
**INTERNATIONAL DISTRIBUTION PARTNERS NV**, Belgium\*  
**INTERNATIONAL PAPER - EUROPEAN CONTAINER DIVISION**, Belgium\*  
**INTERFEL\*** France\*  
**KOELLA, HAMBURG OVERSEAS IMPORT GMBH & CO. KG**, Germany  
**KONINKLIJKE FRUITMASTERS**, The Netherlands  
**LEMBANA**, Denmark  
**LEON VAN PARYS**, Belgium  
**M. M. D. SHIPPING SERVICES**, United Kingdom \*  
**MACK MULTIPLES DIVISION**,, United Kingdom  
**MACK INTERNATIONAL TRADING**, United Kingdom  
**MARIO ANDRETTA & CO**, Germany  
**MAROC FRUIT BOARD**, Morocco  
**MATTSTEDT GMBH & CO.**, Germany  
**MBM**, Poland  
**MEDITERRANEAN FRESH FRUIT, VEGETABLE EXPORTERS' UNION**, Turkey\*  
**MENEU DISTRIBUCION**, Spain  
**MOUTON CITRUS**, South Africa\*  
**MUENSTER FRUIT LOGISTICS**, Germany  
**NFC- NEW FRUIT COMPANY INTERNATIONAL**, Belgium  
**NORTHWEST HORTICULTURAL COUNCIL**, United States of America \*  
**NORWEGIAN ASSOCIATION OF FRUIT AND VEGETABLE WHOLESALERS**, Norway  
**NUFRI SAT 1596**, Spain

NYKCOOL AB, Sweden \*  
 ORIGIN FRUIT DIRECT, BV, The Netherlands  
 PACIFIC FRUIT COMPANY ITALY SpA, Italy  
 PACIFIC FRUIT LTD, Croatia  
 PAUL KEMPOWSKI, Germany  
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