



Synthesis of evaluation reports from Member States regarding their national strategies for sustainable 2013-2018 operational programmes in the fruit and vegetables sector

**12 April 2023
Agri Unit B.1**



Characteristics of fruit and vegetables sector

EU F&V production is worth 57 Bio EUROS (compared to cereals: 42 and Dairy 52) and counts for 14 % of the total value of the EU's agricultural production

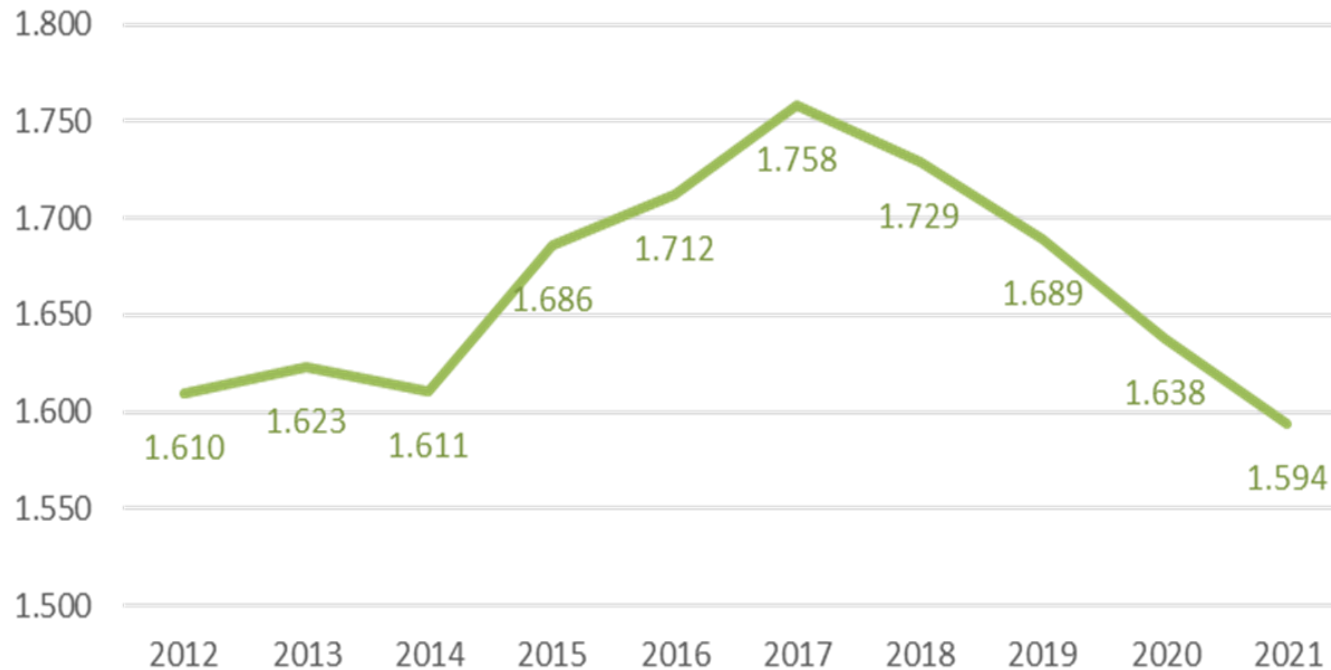
More than half (52%) of all agricultural Producer Organisations (POs) in the EU are established in the fruit and vegetables sector

POs: basis for the EU support to F&V sector 800/900 Mio EUR /year (3.5% of CAP budget)

*In **2021**, 1 594 POs and 33 transnational POs (ES – 521 PO, IT – 297, FR – 206, PL – 175 and GR – 127)*

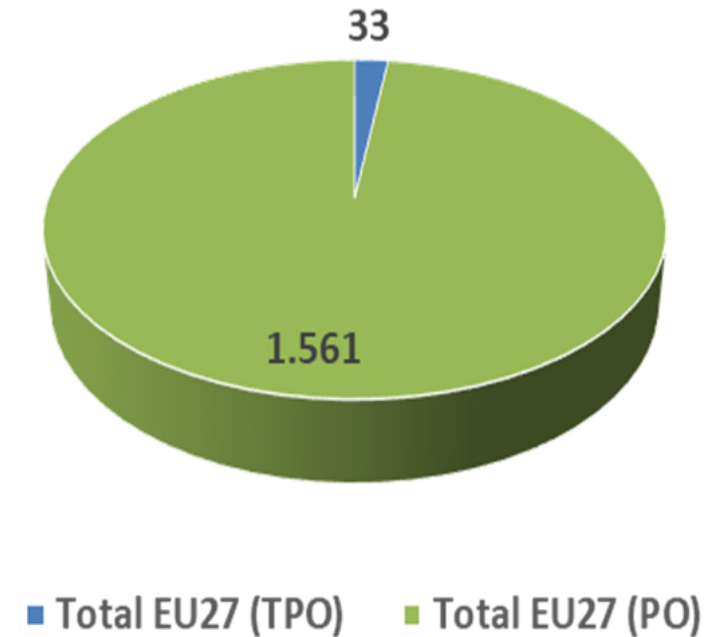
Producer Organisations National and Transnational (2021)

Number of POs (incl TPOs) in the EU



— Total EU27 (PO and TPO)

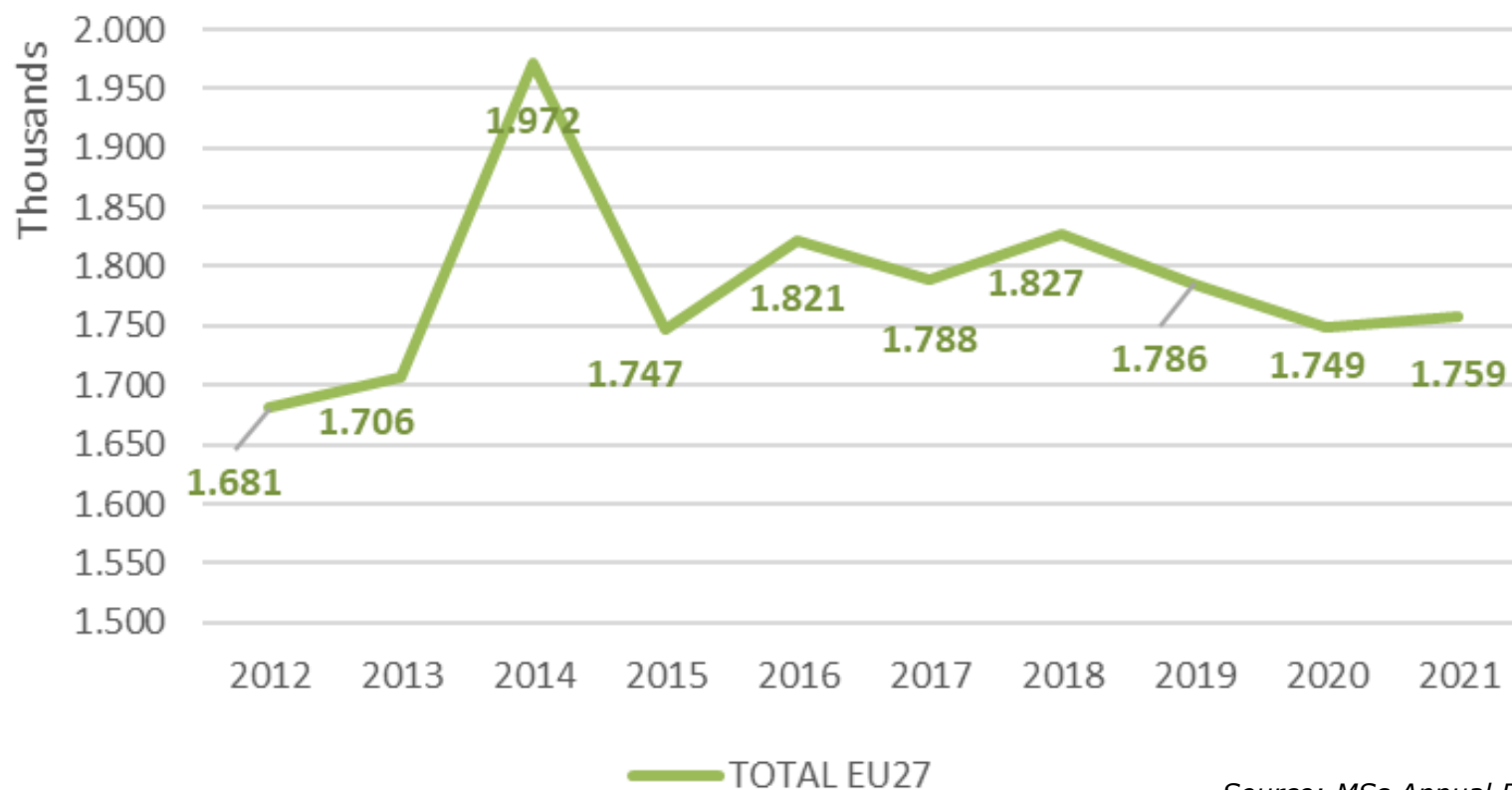
Number of POs and TPOs in the EU(27) in 2021



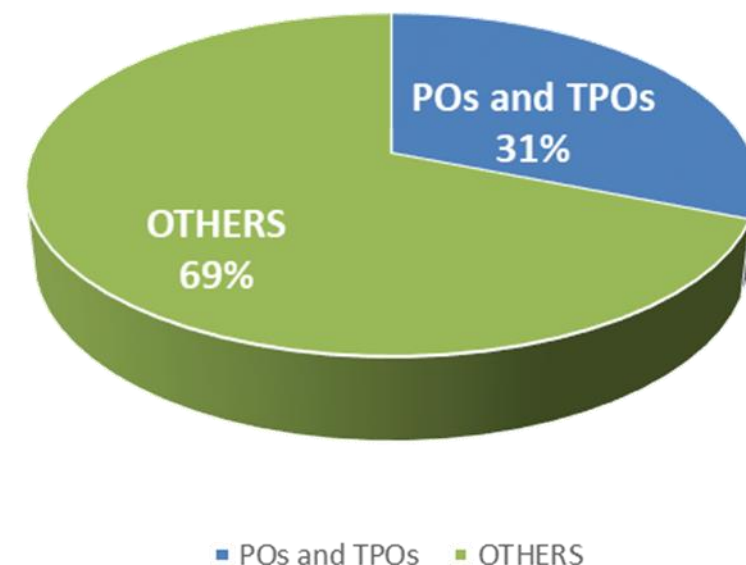
■ Total EU27 (TPO)

■ Total EU27 (PO)

Fruit and vegetables production area [.000 ha]



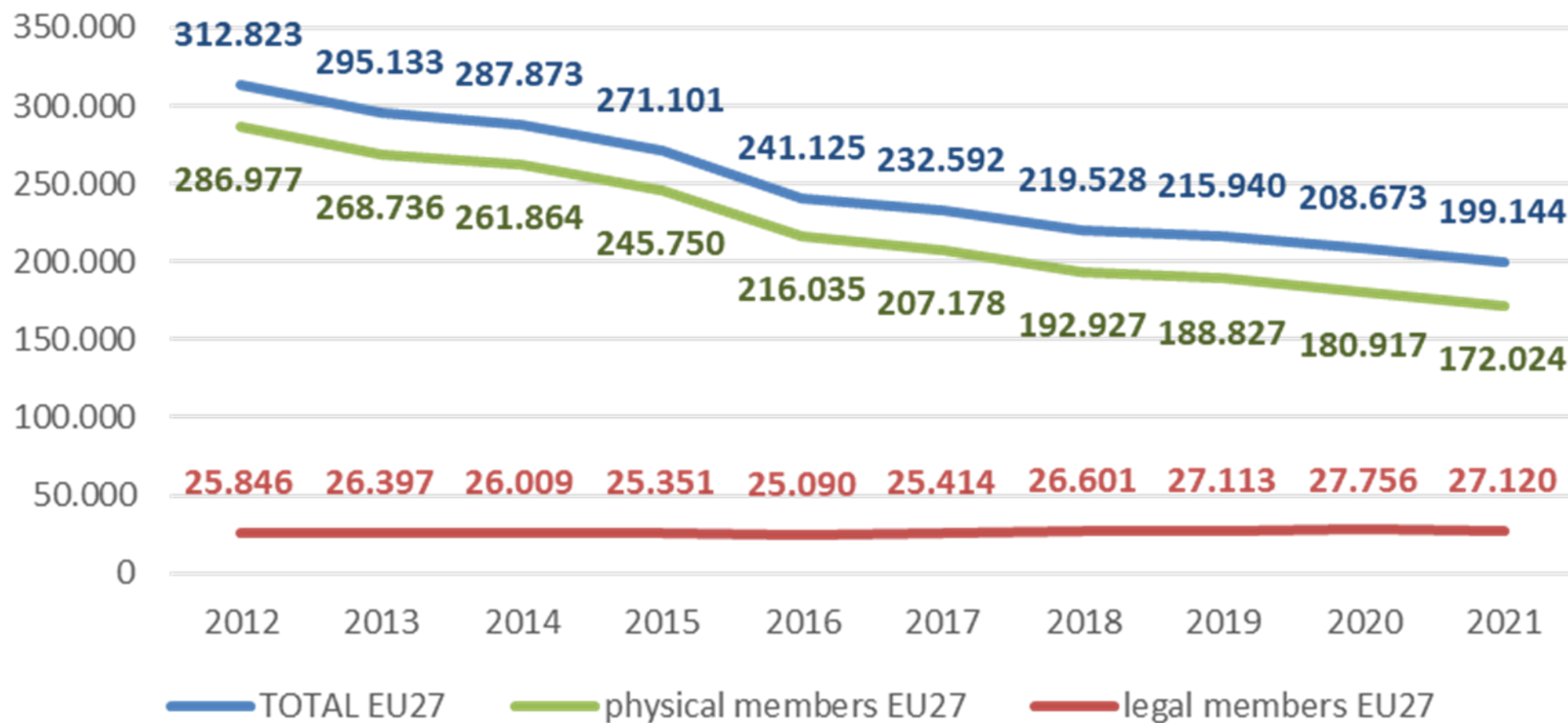
Organisation rate based on area, EU27



Source: MSs Annual reports 2021

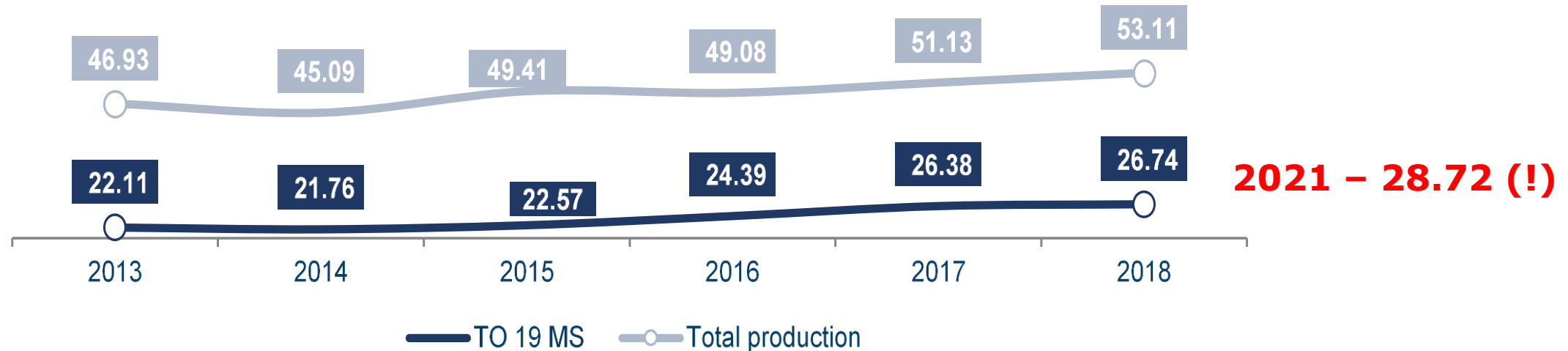
Source: MSs Annual Reports, Tables 2.1 and 2.2 (Total area under fruit and vegetables production (ha)(excluding mushrooms))
Eurostat Agricultural production fresh vegetables incl. melons and strawberries + fruits, berries and nuts (excluding citrus fruits, grapes and strawberries) + citrus fruit + grapes for table use + grapes for raisins.

(T)POs membership evolution (2021)



Total fruit and vegetable production and Value Marketed Production (VMP)

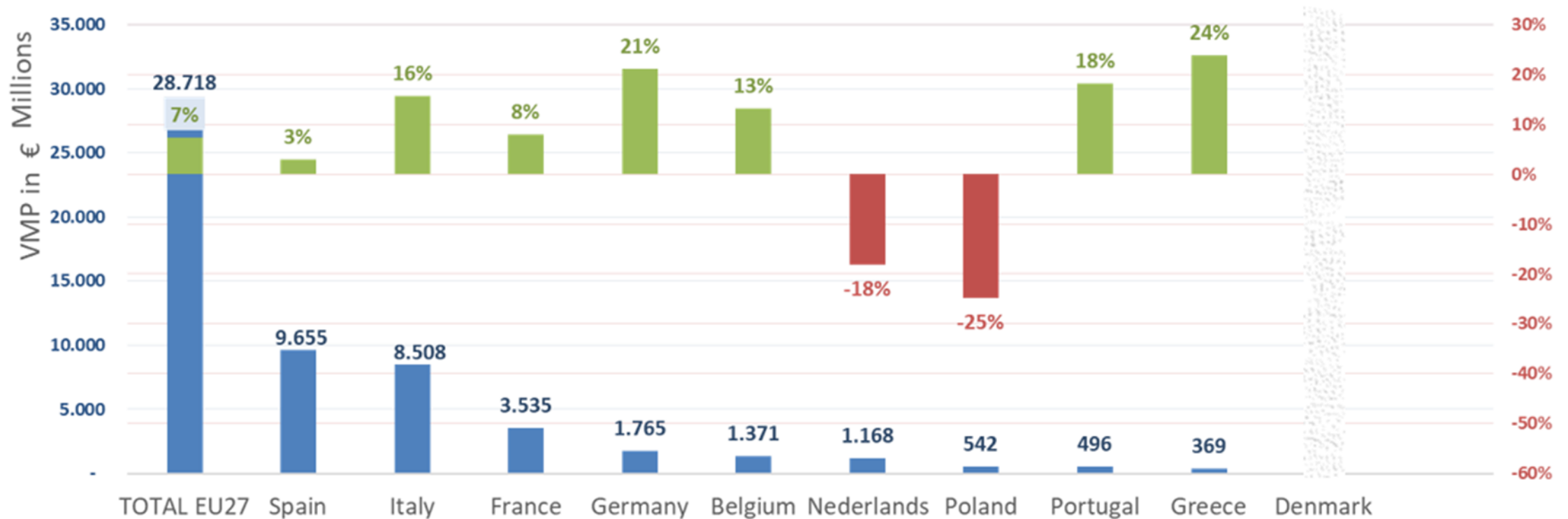
Figure 1 Agricultural production and VMP by POs for the 19 MS, 2013-2018 (EUR billion)



Source: Ecorys based on EC data

Value Marketed Production (2021)

VMP per MS : 2021 and 2021 vs average 2016-20



Source: MSs Annual Reports, Tables 2.1 and 2.2 (value of production marketed for fresh consumption and marketed/used for processing)

Fruit and vegetables: national strategies and evaluation

Legal basis: Article 36(2) of Regulation (EU) No 1308/2013 (national strategies)

Member States are required to establish a national strategy for sustainable operational programmes (OPs) (analysis of situation, justification of priorities chosen, the objectives, assessment of OPs and reporting obligations)

Legal basis: Article 27 of Regulation (EU) 2017/891 (evaluation)

In 2020, Member States were required to evaluate the implementation of their national strategy through operational programmes based on 17 evaluation questions

Evaluation reports

The evaluation reports focused on 1) identifying the contribution and efficiency of operational programmes in achieving national strategy objectives 2) coherence with other CAP interventions and policies implemented at the national and regional levels

The synthesis covers 19 evaluation reports (1.574 EUR million in 2018): Austria, Belgium, Bulgaria, Cyprus, Czechia, Denmark, Finland, France, Germany, Hungary, Ireland, Italy (489.3 EUR million), Latvia, Netherlands, Poland, Portugal, Romania, Spain (EUR 489.4 EUR million), and Sweden

The assessment is entirely based on the information and data collected from the evaluation reports from the MSs (!)

Country fiches will be made available on the Europa [website](#) (!)

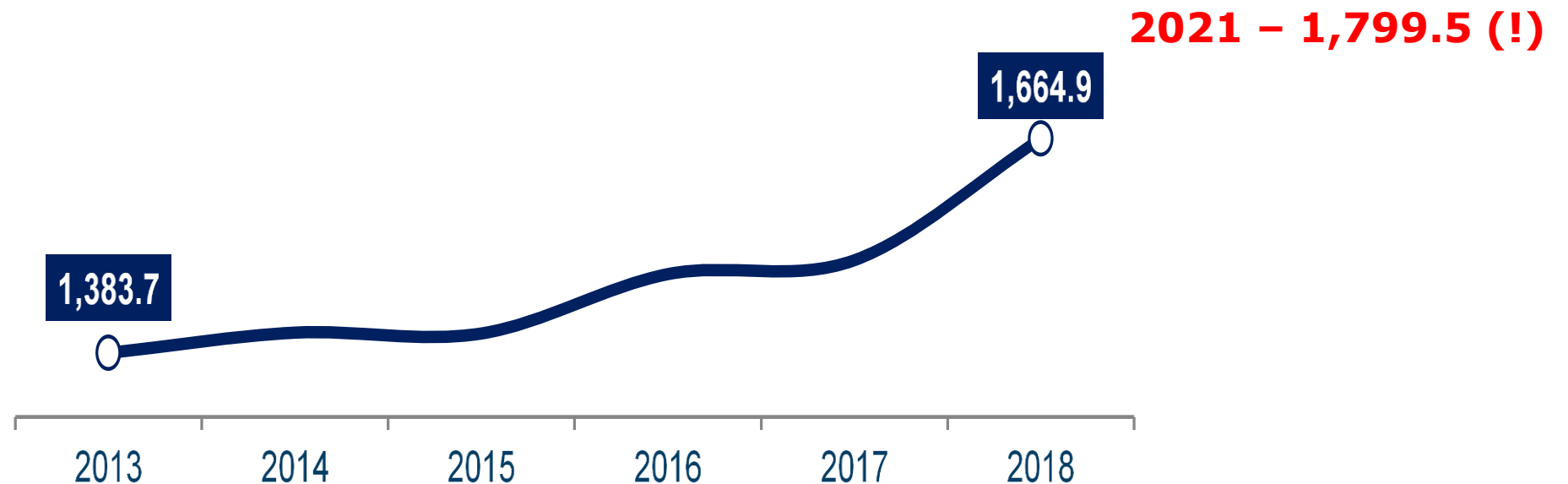
Operational programmes and CAP objectives

Producer Organisations through their Operational Programmes positively addressed the several layers of objectives outlined for support for fruit and vegetables such as

- 1) overall CAP objectives (Article 39 of the Treaty on the Functioning of the European Union)*
- 2) the objectives POs have to respect in order to be recognised by Member States (Art 152(c) of CMO Regulation)*
- 3) the objectives of the operational programmes designed by POs (Art 33 of CMO Regulation)*
- 4) the objectives of the national strategies to be designed by the MS to guide the content of the operational programmes (Article 36 of CMO Regulation)*
- 5) specific objectives for particular measures defined under the national strategies*

Overall expenditure 2013-2018 (million)

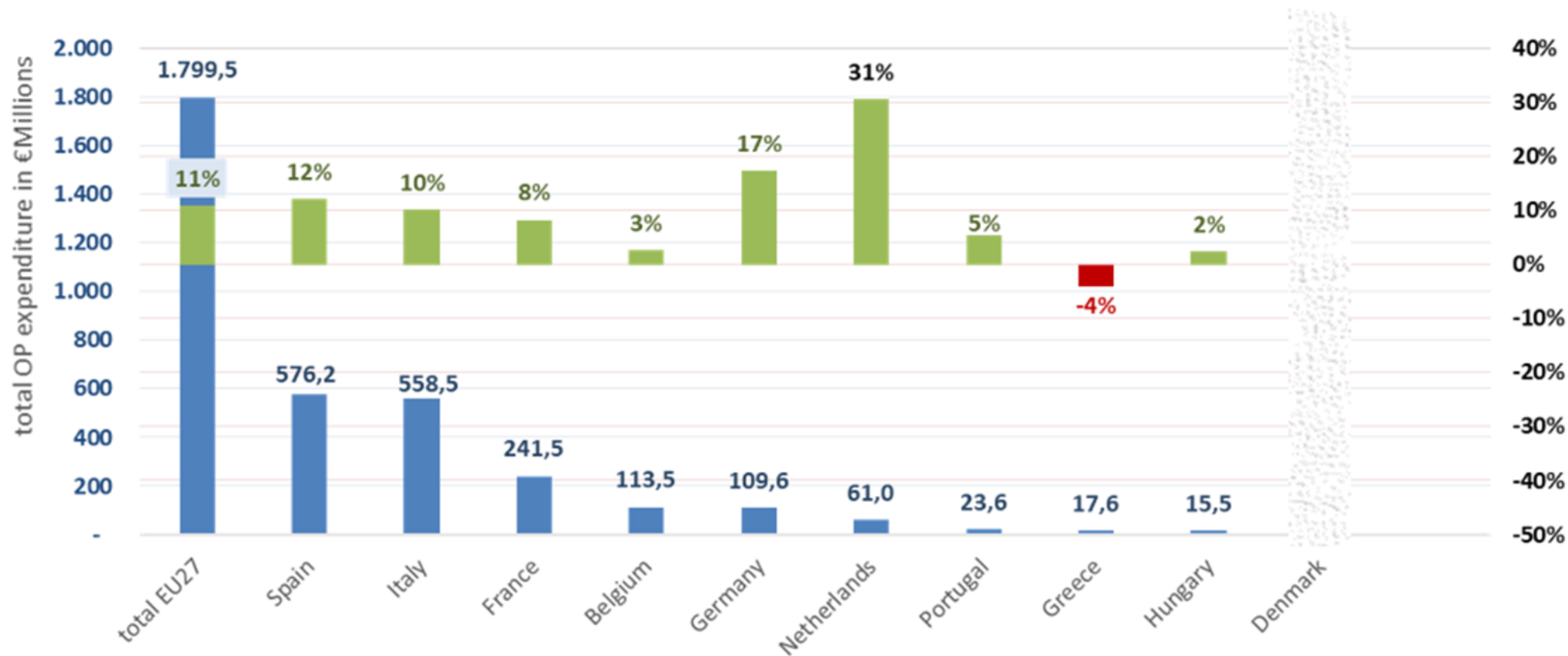
Figure 1 National Strategies overall expenditure (2013-2018) in the analysed Member States, EUR million



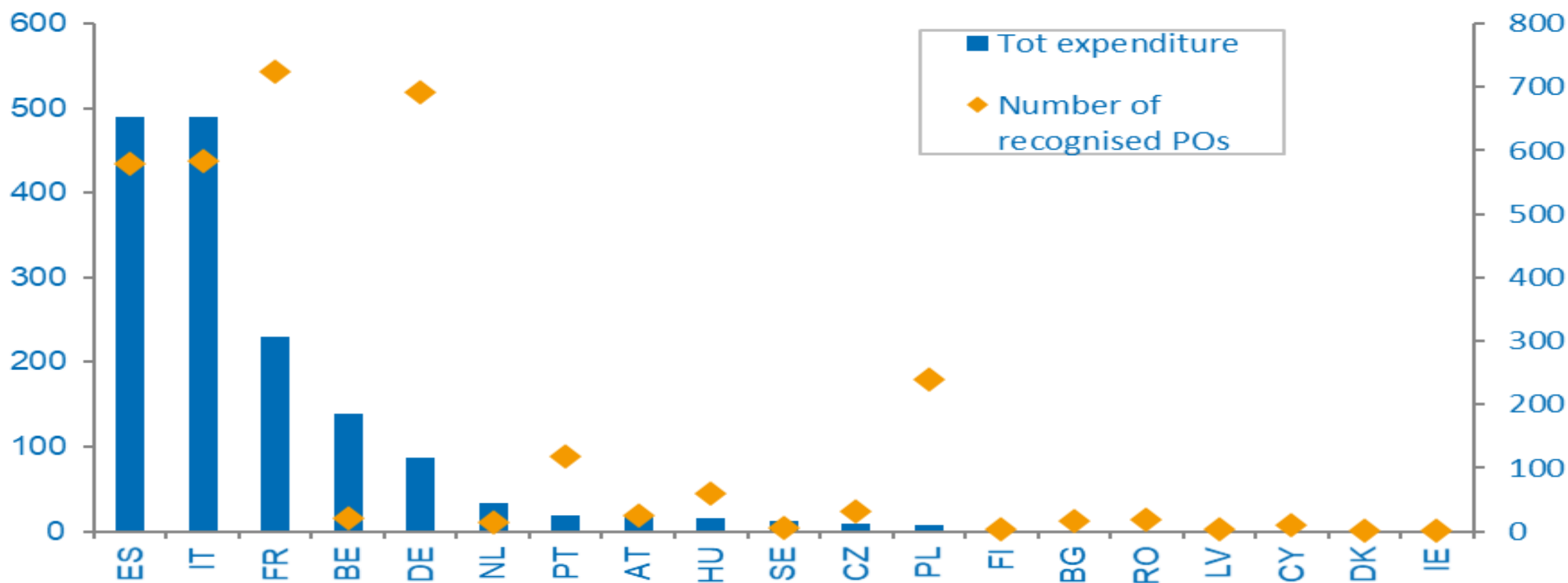
Note: * data for Finland for 2017 is missing
Source: Ifls based on EC data

Operational programmes (1) (2021)

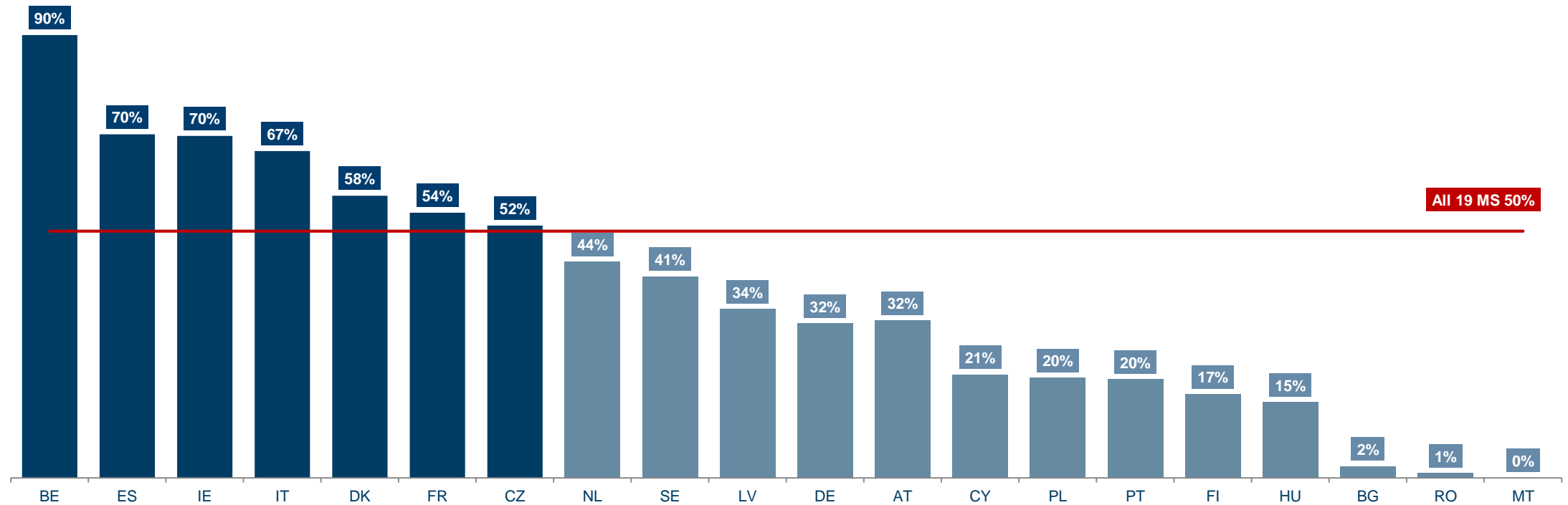
Total OP expenditure per MS: 2021 and 2021 vs average 2016-20



Total expenditure (million) and number of recognised producer organisations 2018



Organisation rate (%) of 19 MS 2018



Expenditure by measure (objective) 2013 and 2018

Figure 1 Share of expenditure by measure in the analysed Member States in 2013

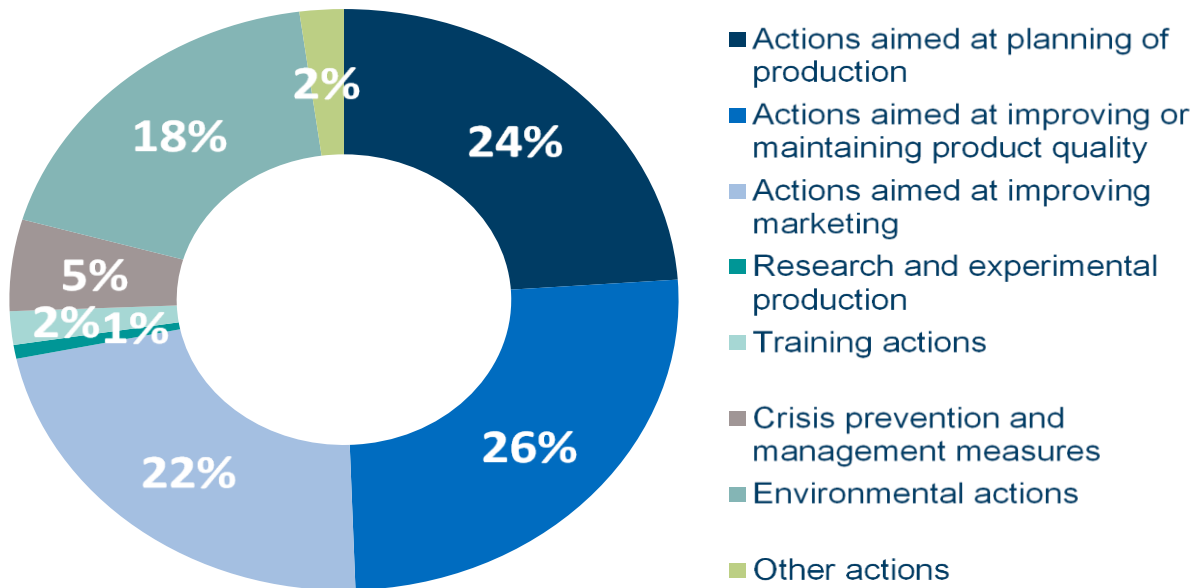
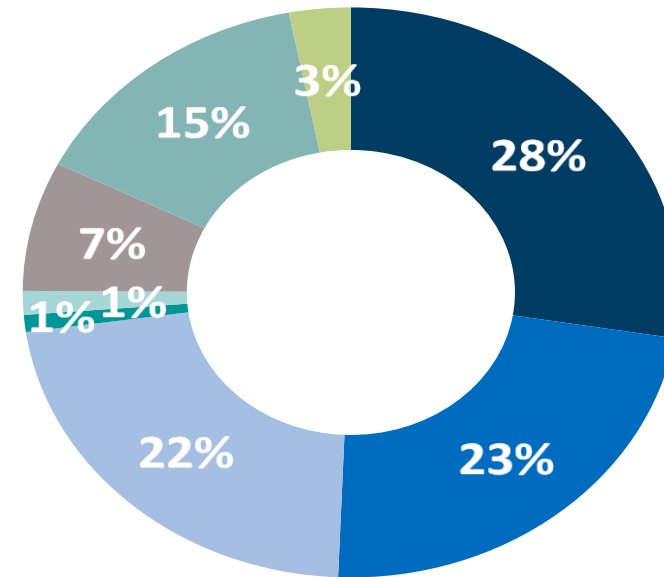


Figure 2 Share of expenditure by measure in the analysed Member States in 2018

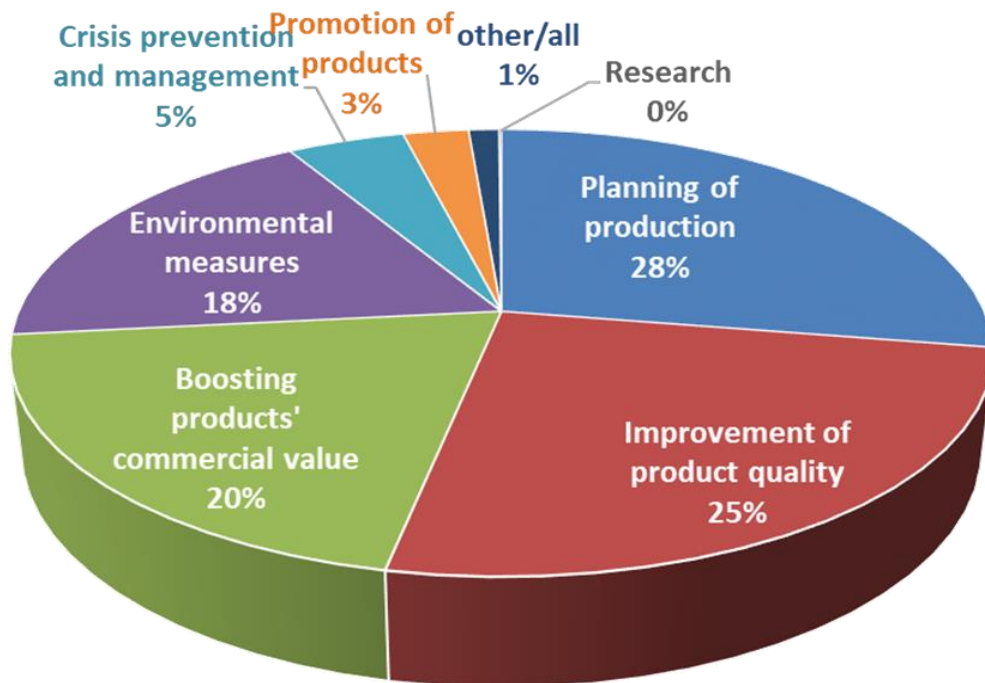


Note: Other actions refer to a) purchase of fixed assets, other for of acquisition of fixed assets (i.e. renting, hiring and leasing), c) other actions.

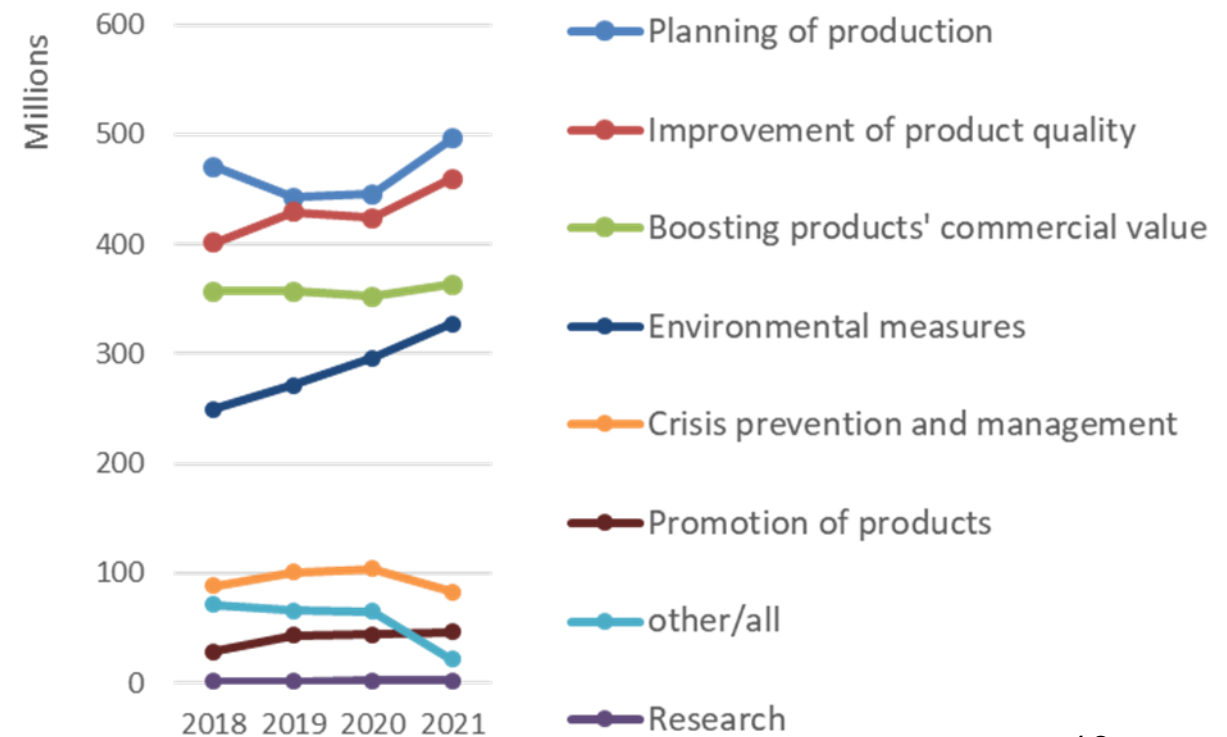
Source: Ifls based on EC data

Operational programme expenditure (2021)

Operational programmes per objective, EU27, 2021 (total € Mio 1.780)



OP expenditure per objective, EU27



Main findings of the synthesis

*Contribution and efficiency of operational programmes toward the objectives of producer organisations under the CAP **are positive!***

Due to a lack of evidence, contribution is considered uncertain in very limited cases

Overall operational programmes clearly contribute to:

- improving the attractiveness of POs*
- promoting the concentration of supply*
- promoting the placing on the market of the products of the members of POs*
- ensuring that the production of POs is adjusted to demand and*
- boosting the commercial value of POs products*

Attractiveness of producer organisations - positive impact

The attractiveness of membership mainly stems from the resulting economic advantages compared to non-members:

- overall better market position or improved competitiveness*
- improved access to harvesting and processing machinery*
- financial advantages and co-investments*
- knowledge exchange and technical assistance (e.g. regarding other production forms)*
- better access to crop insurance*
- access to measures that ensure product quality or certification*
- increased resilience to shocks (including price stability) and, to some extent, general structural trends, due to the community approach*

Product quality and marketing – concentration of supply (1)

MSs have reported a positive impact of operational programmes in concentration of supply

Actions implemented through OPs as contributing are linked to production planning, improvement and promotion of marketing, improving quality and training measures, and actions to promote access to advisory services

Due to external factors and the lack of data, it was difficult to evaluate the extent to which OPs contributed to the objective

Similarly, the efficiency of OPs in promoting the concentration of supply was overall positive but assessed only by a limited number of MSs

Product quality and marketing – concentration of supply (2)

While the size of POs is observed to be a factor influencing the contribution of OPs to the concentration of supply, different dynamics were observed

FR - the largest PO plays a key role in contributing to concentration

IT - contribution of smaller POs continues to grow

No clear trend observed in DE (achieved indirectly)

SE - no measures were taken to concentrate supply

Product quality and marketing – promoting the placing on the market (1)

MSs almost unanimously reported a positive impact of operational programmes in supporting the placing on the market of PO members products, showing a positive trend in the value of marketed production

Operational programmes with actions aimed at production planning, (28% of total expenditure in 2018) maintaining and improving product quality together with, for example, training activities focusing on quality assurance (also environmental) and quality enhancing, such as certification and audit) also have a significant role in the achievement of this objective

Product quality and marketing – promoting the placing on the market (2)

In relation to the efficiency of the operational programmes in this regard, MSs provided contrasting results

On the one hand the OPs were observed to be particularly efficient by five MSs regarding administrative costs and helping them in generating additional profits and increasing the value of production

On the other hand, some MSs reported low efficiency, in particular due to actions aimed at marketing of production

Product quality and marketing – adjustment to demand (1)

*Operational programmes are considered as having a positive contribution and being efficient in ensuring that the **production** of the producer organisations is **adjusted to demand**, in terms of quality and quantity*

15 MSs claimed that the operational programme can be considered a very effective instrument in concentrating the supply, controlling the production volume of POs and aligning quantity and quality of production with demand and maximising sales

Only three MSs claimed that OPs had a limited contribution in achieving the objective

Product quality and marketing – adjustment to demand (2)

In relation to efficiency, OPs seem to be efficient in achieving the objective, as reported by nine MSs

However, it is not possible to quantify the efficiency of OPs to ensuring that the production of the producer organisations is adjusted to demand since the planning of production and the quality of products depend on several external factors and there is lack of data for key indicators

Product quality and marketing – boosting the commercial value of products (3)

Positive contribution, however, despite the lack of quantitative evidence, only a limited number of reports were able to clearly define to what extent the OPs contributed to this objective

13 MSs indicated that OPs positively contributed to achieving this objective

In relation to the efficiency of the OPs a lack of evidence does not allow for a straightforward conclusion, most MSs did not assess the efficiency

For those MSs that claimed that the OPs were efficient in regard to the specific objective supported their claims with data on the evolution of value of marketed production/volume of production

Competitiveness of producer organisations – mixed results (1)

*11 Member States claimed that the OPs contributed to improving the **competitiveness** of POs although in some cases it is difficult to quantify due to lack of quantitative evidence*

When mentioned, the positive contribution was mostly reflected through the positive developments of the rate of organisation of the sector, a shortening of the distribution chain by reducing the use of commercial intermediation in favour of direct commercial relations or optimised logistics, and modernised horticultural production

Competitiveness of producer organisations – mixed results (2)

*An aspect linked to competitiveness is the **stabilisation of producer prices**, whose assessment was considered more challenging than for other objectives and where no strong conclusions could be drawn on the contribution of OPs*

There is almost a balance between the MS reporting a positive contribution of OPs (10) and those claiming no contribution

France, Poland and Denmark highlight the positive effect of crop/harvest insurances on stabilising producer prices, despite premium prices having increased in recent years

Belgium underlines the positive role of fixed contracts and labels to enhance farm resilience

Environmental measures – positive contribution

*Environmental measures represent an important share of total expenditure made under operational programmes: **18%-21%** of total expenditure for the 2013-2018 period*

The assessment of the contribution of such measures to maintaining and protecting the environment is made complex by the lack of quantitative data, data reliability, and limited use of common indicators

Environmental measures are considered particularly effective for integrated and organic production, biodiversity-relevant habitats, and soil protection

Crisis prevention and management

*Crisis prevention and management instruments contributed to some extent to crisis prevention and management - **7%** of share of expenditure by measure in 2018 (2021- 3%)*

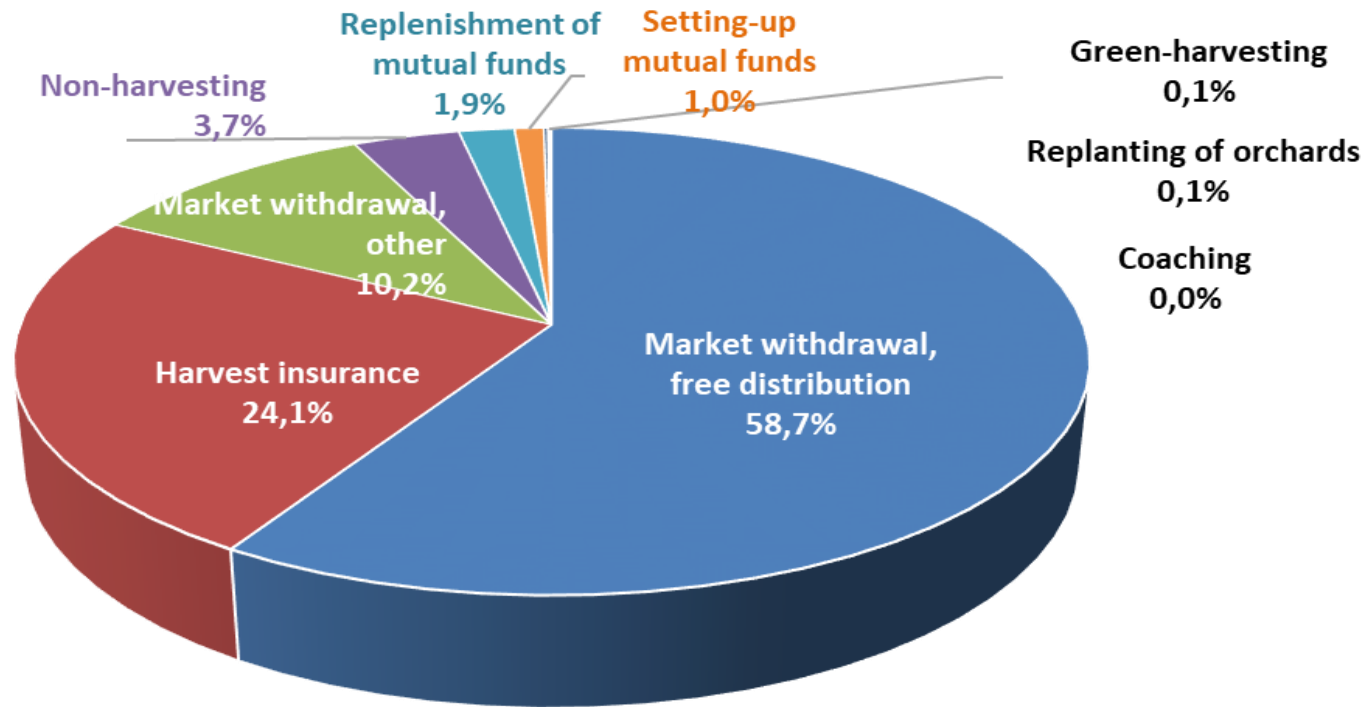
It is not possible to assess which instrument has proven to be the most effective as a certain heterogeneity among producer organisations across MSs was observed

*Measures with the highest uptake - **market withdrawal** and **harvest insurance** - are considered to be the most effective*

The highest levels of expenditure during the evaluation period were registered in Italy, Spain, France and Belgium, while no instruments were used in Latvia

Crisis prevention and management (2021)

Crisis prevention and management, EU27, 2021 (€ Mio 60)



Research and experimental production - limited contribution

Although reports claim the importance of actions related to of research and experimental production, the contribution of research and experimental production to developing new products and/or techniques, developing technical and economic performance and promoting innovation, seems to be limited due to the low uptake of the measure

*In 2018 and **in 2021** the expenditure registered under this measure was **1%** of total expenditure*

Evaluation reports - complementarity and coherence

Clear complementarity was identified with actions aimed at production planning, improving or maintaining product quality improving marketing, crisis prevention and management actions and environmental actions

Actions implemented through OPs are considered coherent with other actions of national strategies and with measures under RDPs with similar objectives (investments, training, innovation)



Useful links

Study:

https://agriculture.ec.europa.eu/common-agricultural-policy/cap-overview/cmef/products-and-markets/synthesis-evaluation-reports-member-states-regarding-their-national-strategies-sustainable-2013-18_en

Fruit and vegetables sector reports:

https://agriculture.ec.europa.eu/farming/crop-productions-and-plant-based-products/fruit-and-vegetables/sector-reports_en

Thank you for your attention!