

2022 EU Agricultural Outlook Conference



Sustainable agri-food system forged in crises Fruit & Vegetables developments

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THE FRUIT AND VEGETABLES SECTOR IN EUROPE



Production: production for fresh market > 70 mio T, worth ca 35 billion €, 60% sold “locally”

Intra-EU Trade: a „safe“ bank to secure diversity of assortment => 30 mio T worth ca 33 billion €

Export: international relevance for market stability and access to world market: 95% of consumers are out of EU => 7 mio T worth 8.5 billion €

Import: complete assortment with off-season and tropical products => 14.5 mio T worth 15.5 billion €

Business turnover: > 250 billion € across supply chain



F&V SECTOR SUSTAINABILITY JOURNEY IN TIME OF CRISES



Russian embargo

- 7,5 billion € for Western goods
- 5 billion € covered EU agricultural products
- 2,5 billion € of fruit and vegetables.
- 1,2 billion € of Polish fresh produce exports



➤ Succession of events and crises requiring sector's repositioning :

- Event and crisis of the last decade
- Moving towards of process of “deglobalization”
- Adapting to EU strategies such as Green deal and Farm to Fork bringing along:
 - **Opportunities:** already engaged in a sustainability journey for > 20 years, plant diet, sector part of the solution due to its assets
 - **Challenges:** reduction target of PPP without alternative solutions, organic markets under pressure, costs of adaptation, competitiveness of the sector in global environment...

➤ Sector at EU level is struggling within a changing environment:

- Food security and food lose are at stake
- Rising costs is questioning profitability (energy, labor, ppp, packaging, certification..)
- Short term issues challenge the success of long-term EU strategies and objectives
- Uncertainties of consumers uptake:

BUILDING OPPORTUNITIES BASED ON STRONG ENVIRONMENTAL & HEALTH ASSETS OF F&V



Positive role of EU F&V sector to sustainable production and sustainable food system =>



- ✓ Engaged for > 20 years in sustainable production: IPM, GAP certification, testing and monitoring, compliance with private standards..
- ✓ Contribution to many UN Sustainable Development Goals
- ✓ Essential role for rural stability
- ✓ Good for the environment
- ✓ Good for health:

The essential role of fruit and veg sector:



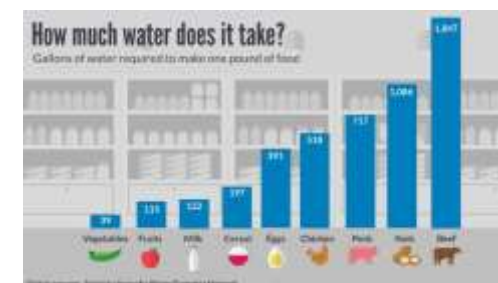
- Part of the solutions for the success of Green Deal and Farm to Fork strategies but also EU beating cancer plan and FIT 55
- A triple «Win»: for the planet, for the citizen's health and for a key agriculture sector

60% of consumers consider that a healthy and sustainable diet is based on f&v and consider eating more is necessary (Euromonitor)

**F&V: only food to be consumed
«without moderation»**



«F&v with the lowest environment impact & highest health benefits»- Barilla Foundation



«F&v with the lowest water footprint»- Water footprint Network

Environmental accountability
European F&V sector setting up its environmental footprint methodology

MOVING TOWARDS A MORE SUSTAINABLE POLISH FRUIT BUSINESS: OUTLOOK & CONSUMPTION





SUSTAINABLE FRUIT AND VEGETABLES SYSTEM WILL ONLY BE ACHIEVED
IF THE ENVIRONMENTAL, SOCIAL AND ECONOMIC PILLARS OF SUSTAINABILITY
ARE IN BALANCE



Thank you for your attention

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