



● ASSOCIATION OF BELGIAN HORTICULTURAL COOPERATIVES ●

2022

ANNUAL REPORT

Foreword

THE RESILIENCE OF HORTICULTURE

Let's look back on the end of 2021 for just a second. The coronavirus pandemic finally seemed to be over. With the rapid development of vaccines and high vaccination coverage, 'the old normal' was lurking around the corner. No more social distancing, no more face masks, no more Covid certificates. Life could finally get back to full speed. At least, that's what we were hoping for.

Until that ill-fated Thursday, February 24, 2022. After almost 80 years, another war started in continental Europe. With overwhelming, far-reaching consequences for a lot of Europeans.

While previous crises were still reverberating, horticulture was once again faced with tough challenges in 2022. Only then did we rediscover how resilient our sector is.

The very first noticeable consequence was the levelling off of our members' turnover. After two years of very strong revenue growth (+9% in 2020 and +4% in 2021), our members' revenue fell by approximately 1% to €1.107 billion in 2022. This was caused by decreased product supply, due to increased energy prices and disruption in the European fruit and vegetable markets. The price of means of production also rose dramatically due to political conflicts and the resulting global resource scarcity.

Moreover, the rising costs of energy, packaging, transport, fertilisers, plant protection products and wages posed a serious threat to the profitability of producers in the entire fruit and vegetable sector. Considering the above, we came to the harsh conclusion that fruit and vegetable producers were once again at the brunt of negative effects from all these conflicts.

We strongly believe in a wide-spanning European policy with a common agricultural policy. In 2022, the national strategic plan was approved by the EC, in which Flanders presented its concrete ambitions for the new Common Agricultural Policy (CAP). The Common Market Organisation (CMO) is a crucial theme in the Flemish strategic plan. Our members are keen to participate in further development of the new CMO, even though it may be challenging due to the lofty targets for implementing environmental measures and supporting research & development.

On the one hand, the ambitious political climate and environmental targets are creating opportunities for the fruit and vegetable sector, which is considered a leading sector in the new CAP. On the other hand, the EU is challenging us to become even more sustainable in the future. Examples include reducing the use of plant protection products and plastic packaging. We gladly accept that challenge provided the transition is fair, affordable and realistic.

2022 was another volatile year. There was great uncertainty regarding cost price evolution, availability of raw materials, doubts on the sales of our products due to disrupted global trade and, finally, also due to hesitation in terms of political decision-making.

The discussion around the new manure legislation, the implementation of a new directive on the use of plastic packaging and the imminent disappearance of necessary plant protection products made those involved uncertain and disheartened. As an umbrella organisation, it is and will remain our mission to continue to collectively defend the interests of our members and the horticultural sector.

The main characteristics of our member-producers' organisations are:

They organise growers to do business together so that producers become stronger within the chain.

They stand strong to adequately meet the challenges that the growers and the sector face.

They take care of growers and their environment.

They guarantee quality, food safety, market transparency and reliability.

They want to have an impact on the policy.

That is why we are, and remain, actively present on the national and international stage, helping to build an agricultural policy centred around the producer, while paying attention to the wider context. After all, we firmly believe that sustainable development can only succeed if there is a proper balance between economic, environmental and social sustainability. We are pleased to have received recognition for these efforts at a European level.

Or to paraphrase Boer Wortel by Felix Timmermans, "I'm just a poor farmer and I've been through a lot of misery, yet farm life is the most beautiful life there is."



Rita Demaré
Chair



Luc Vanoirbeek
General Secretary



About VBT



VBT

p. 6



Organisation

p. 14



Members

p. 16



Supplies and turnover 2022

p. 18

Highlights 2022

Cooperation is...

p. 28

Polycrisis threatens European agriculture and horticulture

p. 30

The European Common Agricultural Policy and the CMO

p. 32

The Belgian Chicory Biennial 2022, a particularly tasty event

p. 34

VBT

The Association of Belgian Horticultural Cooperatives (Dutch abbreviation: VBT) is a non-profit organisation which represents the interests of fruit and vegetable marketing cooperatives.

THE ASSOCIATION

VBT is an association that brings people and organisations together. With each passing day, we build bridges among our members, as well as with broader society. We look at the world with an open mind – you can't afford to isolate yourself these days. We represent our members in a fair, correct manner, and are trustworthy in our political contacts. VBT aims to be a strong alliance for producers' organisations and their member-cooperators in the fruit and vegetable sector.

We closely monitor political, scientific and social developments. One of our main challenges is turning threats for our members into opportunities at all times. Two crucial factors are needed to do so: the right knowledge and social support.

Knowledge and understanding are indispensable in this fast-changing society. VBT aims to put its years of knowledge, experience and insights to the best use of the cooperative fruit and vegetable sector, but also to support national and international social and political debate. As an association, VBT needs to pay continued attention to building public support for its approach. We engage in debates with the various – and often new – players in society and give them an insight into how we work – and at the same time, gain respect for what we do.

STRONGER TOGETHER

Among producers' cooperatives – VBT members – cooperation is central, both within VBT as a sector organisation, and within the individual producers' cooperatives. Together we are stronger, together we can do more.

As a sector organisation, VBT initiates collective actions. While doing so, we constantly ask ourselves how we can move forward together as efficiently as possible.

VBT

- represents and promotes, both nationally and internationally, the interests of Belgian producers' cooperatives in the fruit and vegetable sector
- collaborates with other organisations, federations and relevant stakeholders as necessary
- offers its members a platform for debate and exchange of knowledge
- provides sector-relevant information to its members and acts as a service provider in specific fields



REPRESENTATION

As a sector organisation, VBT represents its members in numerous other associations, both in Belgium and abroad. It engages in dialogue with relevant parties, identifies common views and defends the interests of its members in:

The European Commission's Directorate-General for Agriculture and Rural Development (DG AGRI)

the Civil dialogue group (CDG) on Horticulture, Olives and Spirits

the Working Group on Apples & Pears, Expert Group on Apples & Pears, Forecast Group on Apples & Pears

the Working Group on Tomatoes, Expert Group on Tomatoes, Forecast Group on Tomatoes

The Department of Agriculture and Fisheries of the Flemish Government

the Strategic Advisory Council for Agriculture and Fisheries (SALV)



the Working Groups on Harvest Forecasts

the Working Groups on Crop Protection for Small Crops

the Council of the Flemish Fund for Agriculture and Fisheries

the Integrated Pest Management (IPM) Sector Groups

The Federal Public Services

the Advisory Committee of the Federal Agency for the Safety of the Food Chain (FASFC)

the Taskforce Export Agri-food under the auspices of the Federal Public Service Foreign Affairs

the Advisory Council and Plant Fund of the Federal Public Service Public Health, Food Chain Safety and Environment

Research

Flanders Centre of Postharvest Technology (VCBT)

Optiflux

Promotion

Flanders' Agricultural Marketing Board (VLAM)



Quality systems

GLOBALG.A.P.

Qualität und Sicherheit (QS)

Vegaplan

The agri-food chain

the Assemblée des Régions Européennes Fruitières, Légumières et Horticoles (AREFLH)



Comeos

the Concertation Platform for the Processing of arable Crops and horticulture products (CPPC)

Elsewhere in Belgium

GS1 Belgilux

the Expertise Centre for Sustainable Horticulture (KDT)

the National Cooperative Council (NRC)

International

Copa-Cogeca – the Working Group on Fruit & Vegetables



Freshfel Europe



the World Apple and Pear Association (WAPA)



SERVICES

As a sector organisation, we work on behalf of our affiliated members. Our services include a wide range of activities.

Data Management

Through data management, VBT informs various parties about market developments in the fruit and vegetable sector. The VBT database is updated daily by its members with sales volumes and market prices. In the Flemish government's working groups on Fruit Harvest Forecasts and Vegetable Harvest Forecasts, VBT provides an annual overview of production areas and volumes, as well as a monthly overview of pome fruit stocks. International data are exchanged within the World Apple and Pear Association (WAPA). VBT makes this information available primarily to member producers' organisations and affiliated producers. Regular submissions are also made to the Flemish government and in the press – in Boer&Tuinder, Fruit and Proeftuinieuws publications.

Administrative Management Sales

VBT is responsible for the administrative management of both the simultaneous sales circuit and the remote purchasing system. The simultaneous sales circuit allows the same products to be sold simultaneously at electronically linked auctions, and the remote purchasing system allows buyers to buy from a distance. VBT manages a database of buyers who are uniquely identified at all affiliated auctions. Furthermore, VBT is a member of GS1 Belgilux and manages GTIN codes for packaged fruit and vegetables for its members, compiled according to GS1 standards. Through GS1's My Product Manager tool, product information is made available to retailers and consumers electronically.



Research Projects

VBT is involved in numerous research projects. In 1997, VBT, together with KU Leuven, established the Flanders Centre of Postharvest Technology (VCBT), a research institution focusing on post-harvest technology. In 2021, VBT cofounded Optiflux, a KU Leuven spin-off, which develops innovative methods for preserving fruit. Together with its members, VBT is represented in the user groups of some 20 agricultural research projects (LA-trajecten). The research projects are supported by the Innovation & Entrepreneurship Agency (VLAIO) and by sector funding, some of which comes from producers' organisations.

Market Access to Third Countries

Exporting is a must for the economic sustainability of the co-operatively organised fruit and vegetable sector. While exporting to European Union member states is a tradition, gaining and maintaining market access to third countries remains a challenge. Through internal consultation with members and external consultation with various organisations, VBT monitors developments in trade, product-related and logistical conditions to promote sales in third countries. VBT actively cooperates with the Federal Agency for the Safety of the Food Chain (FASFC), the Federal Public Service Foreign Affairs and the Federal Public Service Economy. This will give it insight into potential market access to third countries, enable it to draw up a joint plan of action and prepare princely/economic missions. For export markets with specific product-related provisions – phytosanitary or food safety requirements – VBT draws up sectoral technical files and procedures with management measures in close cooperation with the members, Fresh Trade Belgium, research institutes and laboratories. This will allow fruit and vegetables to access new markets, subject to the necessary approval from the FASFC and/or the relevant third-country authorities.

Mid-2022, the FASFC received a request from India for a bell pepper and blueberry inspection visit. India did not consider the files advanced enough to include the remaining products in the inspection visit. The concrete details of the inspection visit were worked out by VBT in consultation with the FASFC. It started with a traditional introductory session. At this point, FASFC operations were explained by the agency itself, and an introduction to the sector and sector procedures was provided by VBT. The delegation visited Coöperatie Hoogstraten, the research institute Proefcentrum Hoogstraten, BelOrta/Borgloon and two producers. During the assessment session, the three-member Indian delegation already informally indicated that management measures were being taken in line with import requirements, but that more documents were needed to substantiate the case, after which an administrative completion process would follow in India.

In 2022, VBT also continued to pay explicit attention to Brexit, with the United Kingdom (UK) having officially left the European Union on 31 January 2020. Until the end of 2020, a transition period was in place, during which trade remained unchanged, but since 2021 specific import requirements had been in force. In May 2022, VBT participated in the Belgian/princely mission to London. VBT continues to monitor relevant developments – including shifting deadlines for the UK's enhanced import provisions – and informs its members accordingly. To be accurately prepared remains the most important message for them.

Sustainability

With the collective project Responsibly Fresh Goodness by nature, VBT, together with producers' organisations and producers, continues to pursue efforts towards sustainable development. 2018 saw a six-year review of Responsibly Fresh. One year later, in 2019, Responsibly Fresh Goodness by nature was launched, with which the cooperative fruit and vegetable sector revamped the project. The 2021 report explained the actions and measures that were implemented by the producers' organisations and producers – see www.responsiblyfresh.eu.

In 2022, VBT continued to work on two parallel tracks around sustainable development. On the one hand, it evaluated how to give further shape to the collective project Responsibly Fresh Goodness by nature, taking into account social and legal developments, among others. On the other hand, sustainability was the permanent focus within existing quality systems (Vegaplan, GLOBALG.A.P. and QS). Through representation in these quality systems, VBT worked towards including and developing feasible sustainability criteria in these standards. Furthermore, VBT actively participated in Freshfel's Environmental Footprint coalition and in the Circular Food Chain Work Agenda, coordinated by the Flemish government (Department of Agriculture and Fisheries and OVAM).

Packaging and Waste Prevention

VBT coordinates the legal obligations on packaging waste prevention for its members. It is a member of Fost Plus and Valipac, and every three years it draws up a sectoral prevention plan for packaging waste. In 2022, VBT, in consultation with its members, developed the 2022–2025 plan and submitted it to the Interregional Packaging Commission (IVC) in good time, along with the final assessment of the 2019–2022 sectoral plan.

The sector is increasingly facing incrementing regulations on fruit and vegetable packaging, and at different levels – regional, federal and European. Overall, plastic packaging is under pressure and regulations are moving towards bulk sales. VBT closely monitors developments and discusses them within various organisations. The VBT's focus areas are food safety, product quality, food economy, logistics and information for market partners and consumers. VBT is also raising awareness for a level playing field in Europe.

In 2022, VBT continued to participate as a supporting party in the Flemish government's Green Deal Anders Verpakt initiative.

Sectoral monitoring plan

Together with the Expertise Center for Sustainable Horticulture (KDT), VBT coordinates the sectoral monitoring plan for residues from plant protection products, heavy metals-contaminants and microbiological contamination. The members perform the monitoring as part of externally audited quality systems. VBT, together with relevant members and research institutions, participates in a guidance committee for the follow-up of Tomato brown rugose fruit virus (ToBRFV).



Organisation

As a non-profit organisation, VBT gives its members a voice through representatives in the General Assembly, the Board of Directors and various working groups. In 2022, the General Assembly meeting took place on 24 May and by tradition there were seven board meetings, which were prepared within the Management Committee and coordinated by the Chairman and General Secretary. Specific files are discussed with the members in various working groups. The Secretariat, under the supervision of the General Secretary, is responsible for our day-to-day operations.

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AFTER ALL, WE
FIRMLY BELIEVE
THAT SUSTAINABLE
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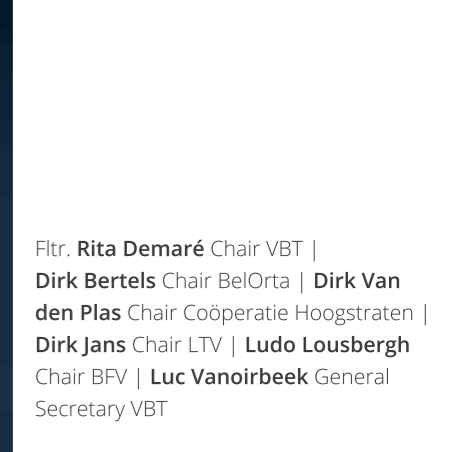
Rita Demaré
Chair VBT



Chair
Rita Demaré
Vice Chair
Dirk Bertels
Ludo Lousbergh
Dirk Van den Plas
General Secretary
Luc Vanoirbeek

Board of Directors
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Koen De Wit
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Ilse Hayen
Dirk Jans
Jan Mertens
Danny Raskin
Filip Vanaken
Hans Vanderhallen

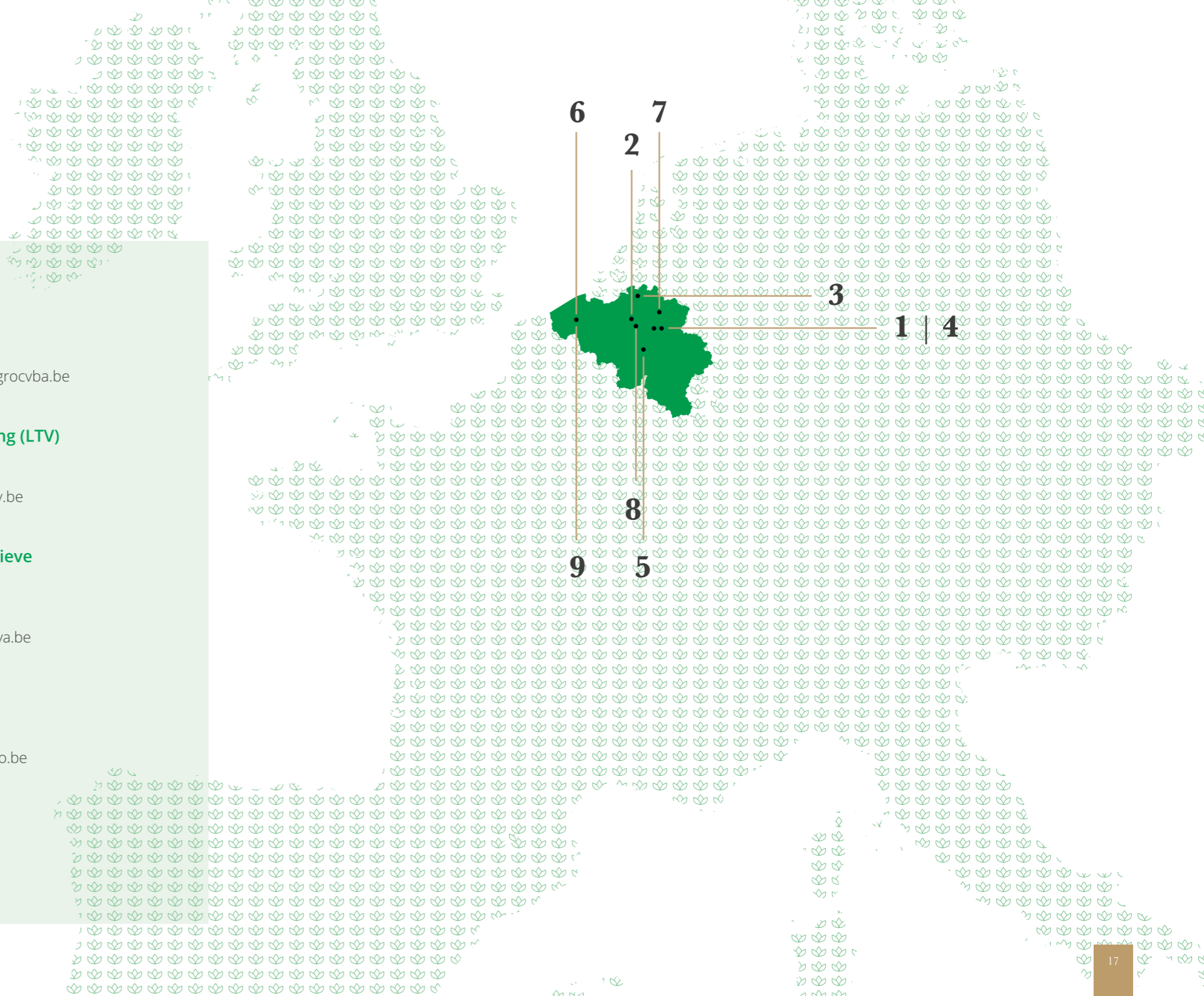


Fltr. Rita Demaré Chair VBT |
Dirk Bertels Chair BelOrta | **Dirk Van den Plas** Chair Coöperatie Hoogstraten |
Dirk Jans Chair LTV | **Ludo Lousbergh** Chair BFV | **Luc Vanoirbeek** General Secretary VBT

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Supply & turnover 2022

The VBT producers' organisations ended 2022 with a combined product turnover of over €1.1 billion – about 1% less than in 2021.

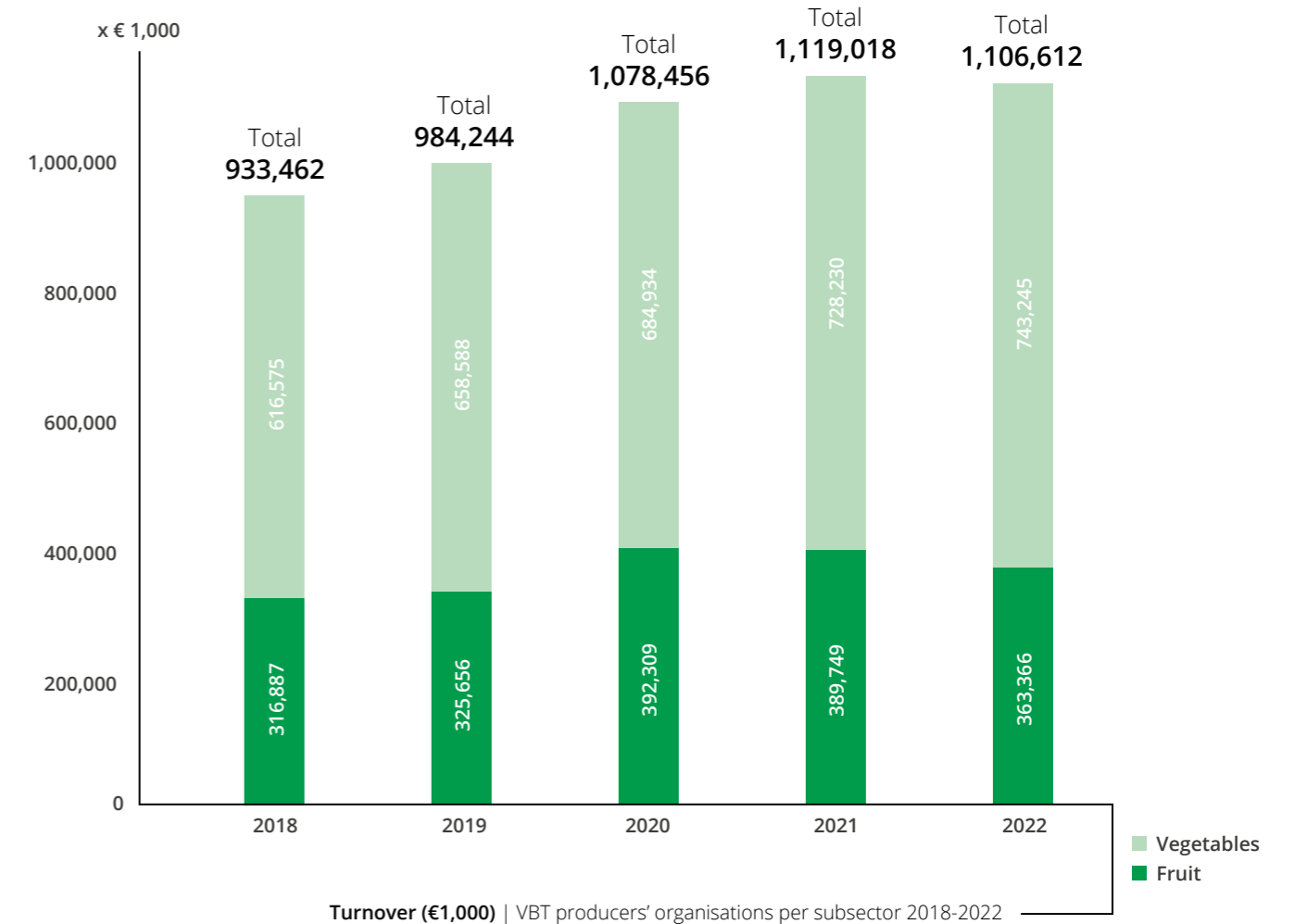
In 2022, producers' organisations' supplies dropped 6% compared to 2021. The decrease for vegetables (-6%) was mainly due to lower supplies of tomatoes (-10 million kg), cucumbers (-18 million units), leek (-3 million kg) and head lettuce (-3.6 million units). Fruit supplies were 2% lower. Both strawberries (-2% or -1 million kg) and pears (-13% or -27 million kg) were supplied less in 2022. In contrast, apple supplies were 20% higher than in the previous year (+20 million kg).

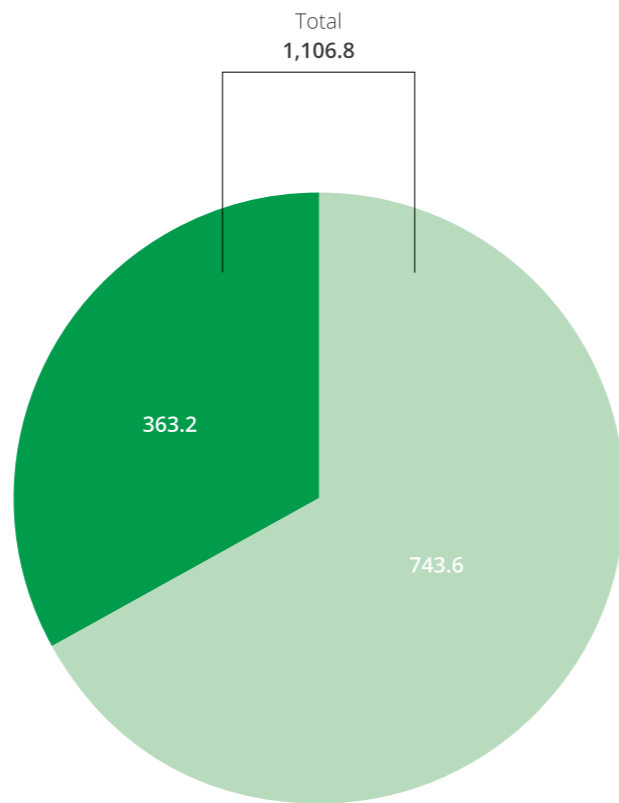
The turnover for vegetables was €744 million, while for fruit it was €363 million. For vegetables, this is a 2% increase compared to 2021. Fruit turnover was down 7%. The ratio between the two in the overall turnover of VBT producers' organisations remains almost steady at 67% vegetables and 33% fruits.

The turnover increase for vegetables in 2022 was mainly influenced by cucumbers (+37% or +20 million euros). Bell peppers (+12%) and tomatoes (+3%) also made positive contributions. For fruit, strawberries (-10%), pears (-6%), and apples (-15%) all saw lower turnover in 2022 compared to 2021.

It remains important to point out that the common statistics and assessments do not take into account differences between production systems and producers.

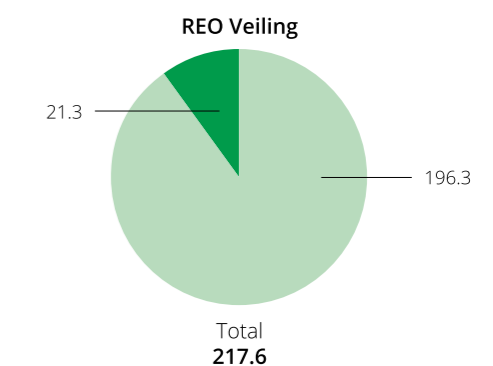
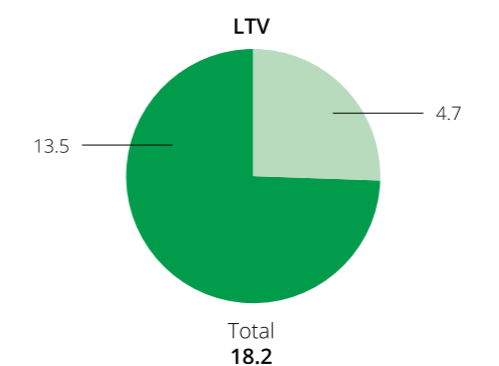
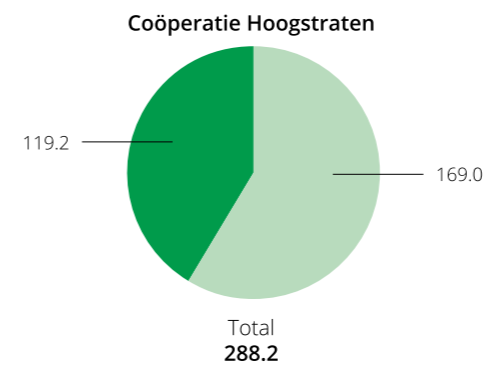
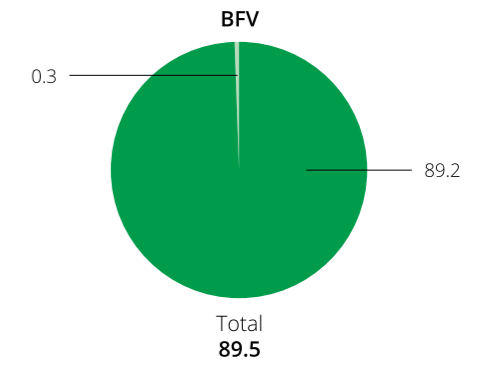
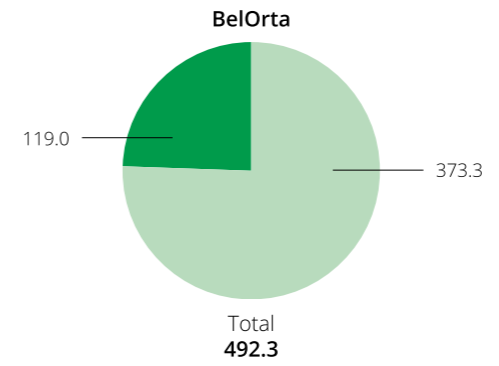
The producers' organisation for vegetables for processing, Ingro, realised a turnover of €102.5 million in 2022, which is 5% less than in 2021.





Turnover (million €) | VBT producers' organisations per subsector 2022

Vegetables
Fruit



2021



49,954	95,990	7,168	185,704	60,401	48,562	212,937	55,903	224,699	38,154
tonnes	tonnes	tonnes	1,000 pc	1,000 pc	tonnes	tonnes	tonnes	tonnes	tonnes

Supply

3.883	0.433	2.307	0.295	0.390	1.195	0.563	0.856	0.872	1.230
€/kg	€/kg	€/kg	€/pc	€/pc	€/kg	€/kg	€/kg	€/kg	€/kg

Price

193,972	41,563	16,536	54,783	23,556	58,032	119,884	47,853	195,937	46,929
x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000

Turnover

Total top 10 products € 799,045,872

2022



48,899	116,006	6,754	167,511	56,773	52,098	186,195	52,665	214,136	37,794
tonnes	tonnes	tonnes	1,000 pc	1,000 pc	tonnes	tonnes	tonnes	tonnes	tonnes

Supply

3.577	0.305	2.328	0.448	0.432	1.248	0.605	0.473	0.942	1.124
€/kg	€/kg	€/kg	€/pc	€/pc	€/kg	€/kg	€/kg	€/kg	€/kg

Price

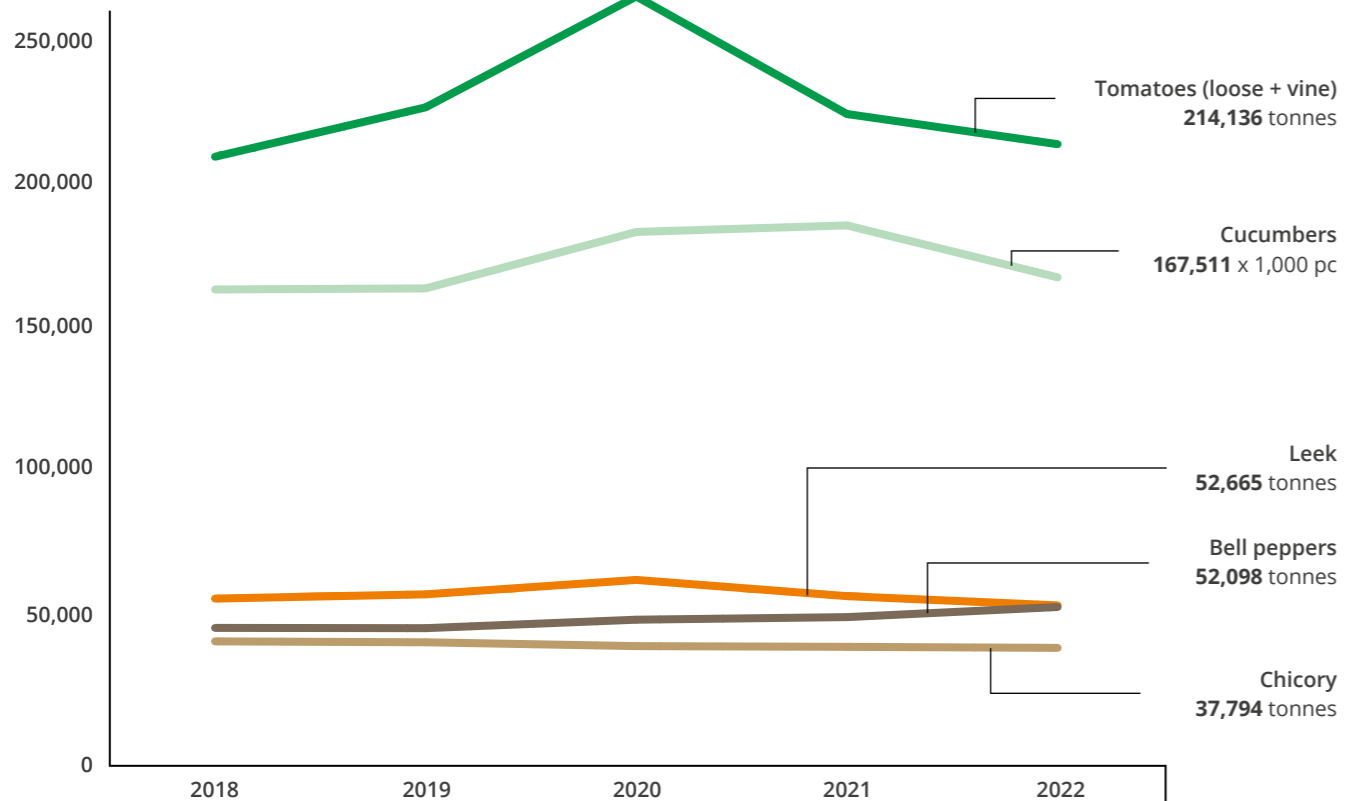
174,912	35,382	15,723	75,045	24,526	65,019	112,648	24,911	201,783	42,480
x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000	x € 1,000

Turnover

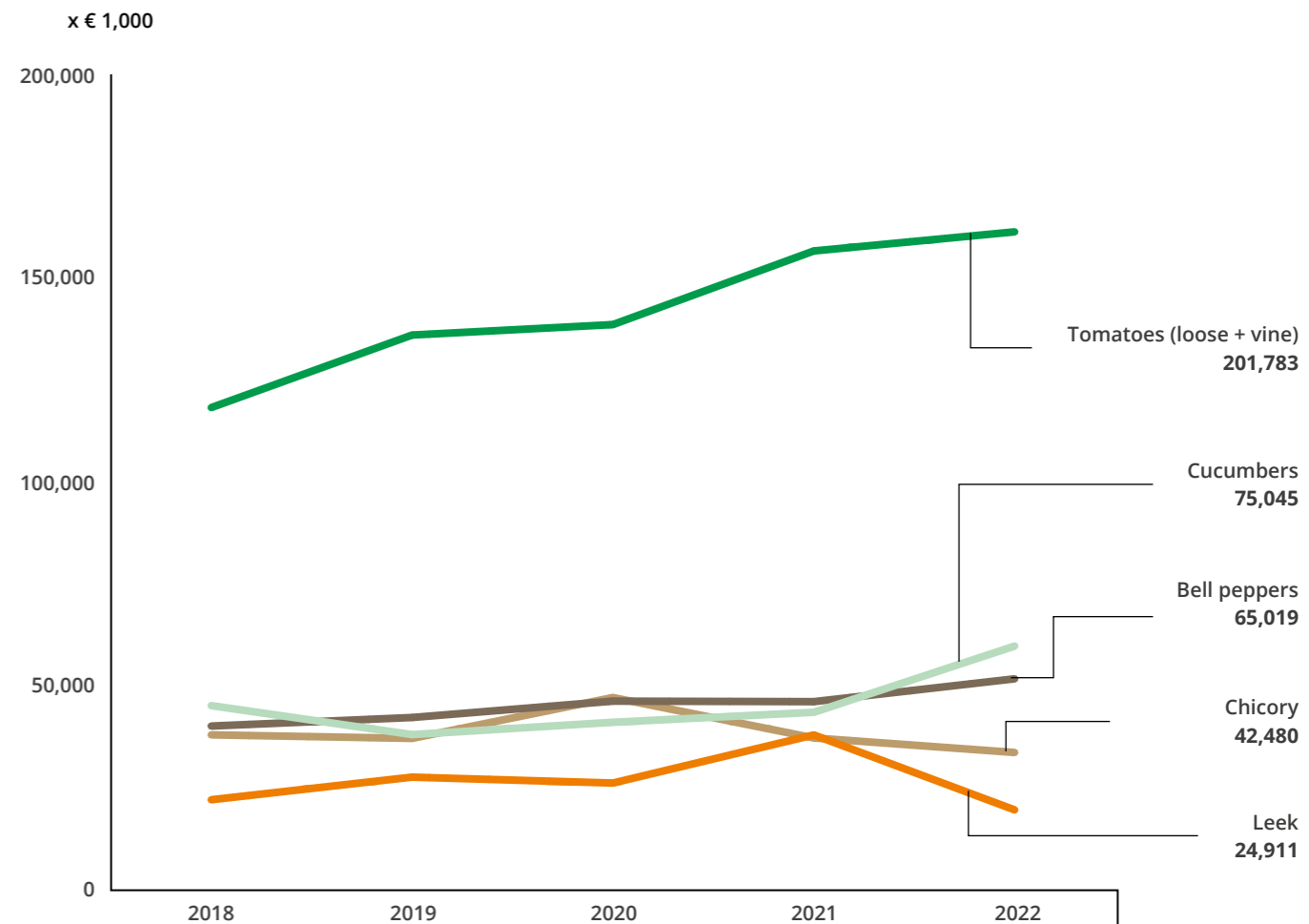
Total top 10 products € 772,427,643

Supply, price and turnover | The main products from VBT producers' organisations 2021-2022

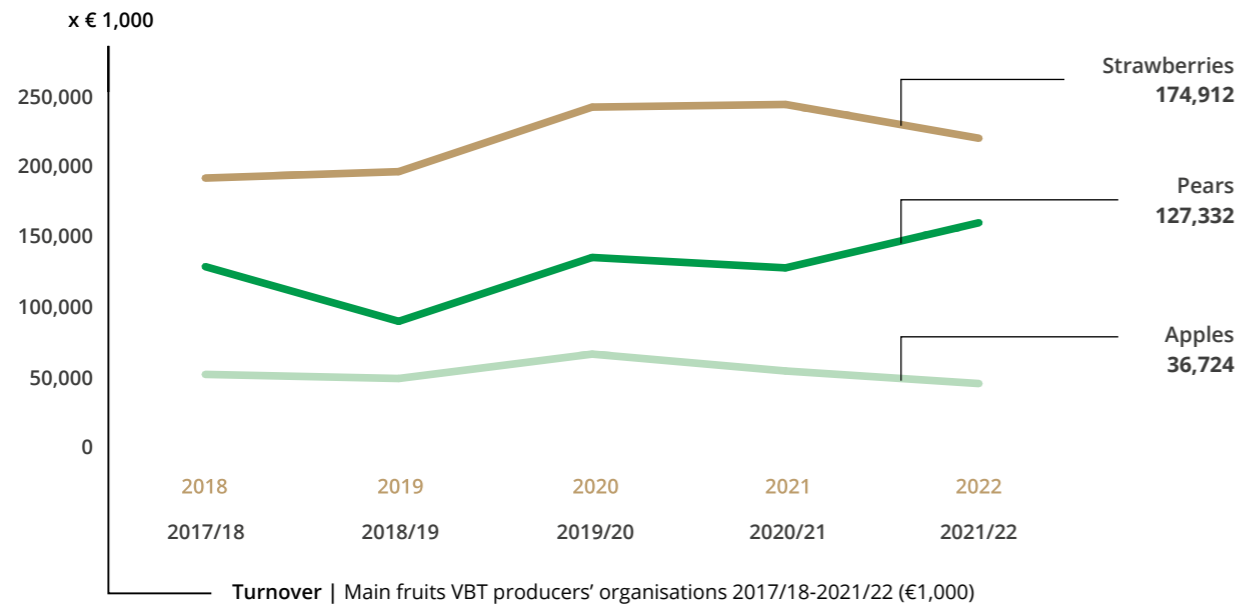
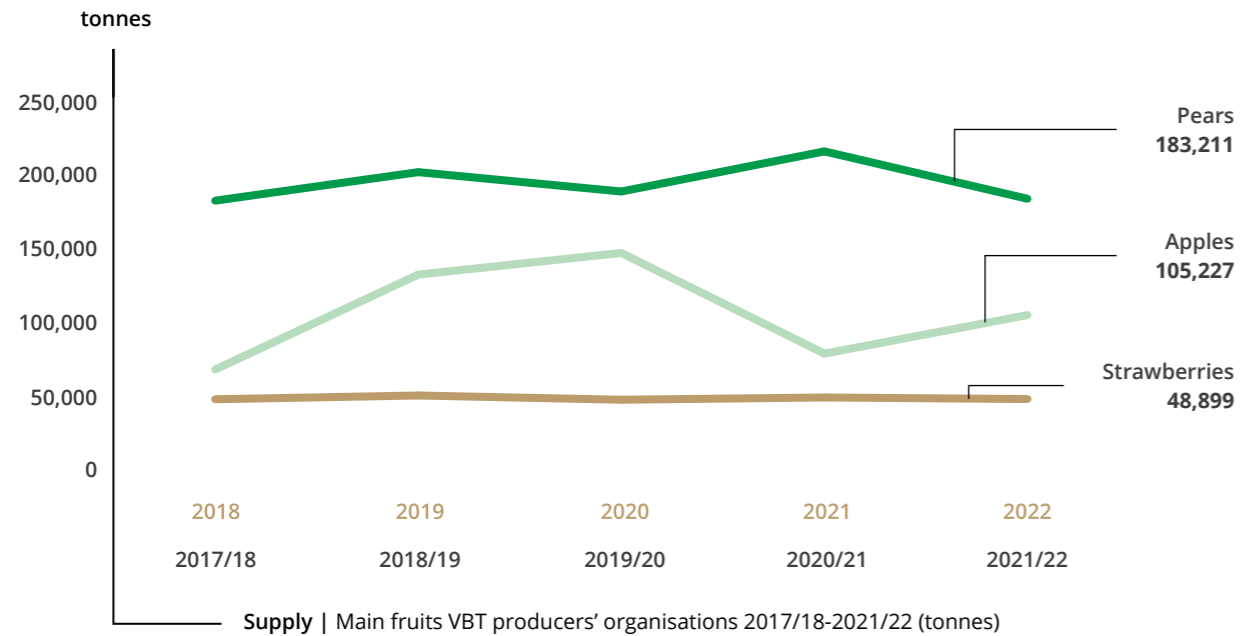




Supply | Main vegetables VBT producers' organisations 2018-2022



Turnover | Main vegetables VBT producers' organisations 2018-2022 (€ 1,000)



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**About time for
 a time-out where we
 reinstate the essential
 role of agriculture and
 the fruit and vegetable
 sector, namely: producing
 healthy, tasty food in
 a sustainable way.**”

Cooperation is...

Producer cooperatives are known to the general public under different names, with (horticultural) auctions being the most commonly used. Yet they stand for much more than just auctioning fruits and vegetables. The cooperative organisation, structure and operation has been summarised in five key concepts: togetherness, strength, security, impact and care. Based on an extensive survey, we were able to provide our members with input on how to interpret and translate these core concepts into their own communications, thereby illustrating their roots and DNA as producer cooperatives.

At the beginning of 2021, we were given an overall mission by our Board of Directors to collectively enhance the profile of our affiliated cooperatives. Since it is important that the message, target audience and approach are correctly defined and mutually supported, we initially conducted a survey among our members. We were responsible for the preparation and follow-up of the survey, which was conducted externally by B2Sense. Based on the results of the member survey, we continued to work on the expected profiling in 2022 and conducted an additional qualitative consumer research. Together with B2Sense, we drew up an overview document, including text and photo material. Our affiliated producer cooperatives can now use this document for their own communications.



TOGETHERNESS

In the cooperative model, togetherness is an authentic core value. A cooperative is a group of producers who voluntarily wish to work together to generate certain benefits. To achieve the same goal for themselves and the market: providing consumers with a high-quality product as efficiently as possible. The cooperative allows producers to take joint steps as equal partners in relevant areas (e.g., quality, sustainability, innovation...). Within a cooperative, producers receive support, there is solidarity, and knowledge and know-how are shared. Yet everyone can add their personal touches and grow at their own pace.



IMPACT

Cooperatives provide a voice for producers. Through specific targets and achievements, they have a broad impact throughout the food chain, the horticultural sector, trade and consumers. They are powerful partners, delivering high-quality products together. Moreover, they strengthen the entire sector with research and development. The cooperative also has an impact on individual producers by providing them with production and commercial guidance. This, in turn, gives them a say in further developments of the cooperative.



SECURITY

The cooperatives ensure reliable and continuous supplies of high-quality fruits and vegetables, with assured food safety. They guarantee logistics performance and ensure a fair and transparent sales system. In addition, they are fully committed to sustainable development – be it environmentally, economically or socially. Finally, they also provide a framework for research and development.



CARE

The cooperative takes care of the collective of producers-cooperators. From an economic and commercial point of view, the cooperative ensures the professionalisation of the producers' collective. In addition, the cooperative takes care of the market. On a human level, the cooperative provides social welfare and some form of involvement and negates producers' both general and crop-related concerns.



STRENGTH

With producers working together, cooperatives are strong players with extra clout in the market. The cooperative ensures additional reliability throughout the chain. It is market- and customer-oriented and anticipates the high expectations and demands of the market. Logistics are also fast and efficient. Furthermore, the cooperative takes joint future-oriented steps. Its scale makes it possible to elaborate projects that are impossible or difficult for individual members to start on their own.

Both within and beyond the sector, we want to spread more awareness about the cooperative philosophy, as we are convinced that cooperation is our strength. Together we are stronger, together we can do more. Cooperatives are not outdated. On the contrary, they are increasingly emerging in all kinds of sectors. Together, we go back to our roots. With our organisation and marketing structure as an example. Let's be proud together.

Polycrisis threatens European agriculture and horticulture

Crises are not unknown to the agriculture and horticulture sector. Looking back on the past decade, several crises cropped up which severely disrupted the horticultural sector. For example, the EHEC or E. Coli crisis in 2011, where an unclear contamination of vegetables caused the entire fruit and vegetable market to crash. In 2014, Russia's sudden ban on imports caught us all off guard and we watched a lucrative sales market disappear completely. Today, we are still suffering the consequences from that in the form of disrupted trade flows throughout the EU. Brexit in 2016 also caused numerous additional costs and, more importantly, concerns within the European Union. Six years later, we can see however that Brexit only resulted in a de facto impoverishment of the British people and additional administrative burdens on EU export activities.

Europe's plan to (hastily) grow into the most sustainable, energy-neutral and environmentally friendly continent in the world then disrupted 2018. A totally legitimate and even perfectly justifiable ambition, except that there was no plan of action to achieve said goals. The historical premises of the Common Agricultural Policy (CAP) were replaced by ambitions such as a 50 per cent reduction in the use of most harmful pesticides and the expansion of organic farming.

The problem in the EU's new policy is its inability to explain what the concrete impact of this transition will be on the sector. Moreover, the answer to the question of how this will be realised in a fair, affordable and just manner remains unanswered.

In 2020, we experienced what was possibly the worst societal crisis ever: the Covid pandemic. Although the most imminent effects of this health crisis are behind us, the impact remains very much felt in trade channels worldwide. Freshfel, the European forum for the fresh fruit and vegetable chain, calculated the impact of this crisis at €500 million.

On top of all the previous crises, in 2022 we were faced with the war in Ukraine. Which, in addition to unbearable human suffering, also caused a huge increase in means of production prices (including +100% energy, +80% fertilisers, +30% plant protection products, +40% packaging). Because of the disruption in world trade, pressure on the European market increased enormously and prices, for example of apples, collapsed completely.

The combination of lingering effects from previous crises with the current crisis in Ukraine is creating great uncertainty about the future of our sector. On top of that, it is also experiencing severe pressure from additional political challenges, at both EU (Farm to Fork) and Flemish (manure-MAP7, phosphate-PAS) levels. About time for a time-out where we reinstate the essential role of agriculture and the fruit and vegetable sector, namely: producing healthy, tasty food in a sustainable way.

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THE PROBLEM IN THE EU'S NEW POLICY IS ITS INABILITY TO EXPLAIN WHAT THE CONCRETE IMPACT OF THIS TRANSITION WILL BE ON THE SECTOR.



The European Common Agricultural Policy and the CMO

Producer organisations serve as a model for the further development of the CAP

There has been a Common Market Organisation (CMO) for fruit and vegetables since 1996. The aim of the CMO is to strengthen the farmer's position in the food chain through the concentration of supply. In addition, collaborating in producers' organisations also provides extra support for producers. By the end of 2021, the EU started using this CMO system as a model for other agricultural sectors, as past experience had clearly shown that the CMO model indeed contributes to higher producer resilience. To support this, the EU provides €830 million every year and chooses not to reduce this budget as opposed to what happened for the general CAP. Producers' organisations and their members will thus be able to count on the EU's continued support until 2027 to realise their ambitions and those of their growers.

Fruit and vegetables serve as a model for the future of European agricultural policy

In late November 2021, the European Parliament gave the green light to the new European Common Agricultural Policy (CAP). The original purpose of the European CAP consisted of five main pillars:

- Increase production in agriculture and horticulture
- Create fair standards of living for producers
- Stabilise markets
- Guarantee food supply
- Ensure reasonable food prices for consumers.

These pillars have remained the same for the new CAP, which has been defined and will be in effect from 1 January 2023 to the end of 2027. To flesh out these overall objectives, each member state was instructed to draw up a National Strategy describing how it intends to meet the EU target. Because of our state structure, Belgium is the only country in the EU allowed to submit two regional plans. The Flemish plan was submitted in 2022 and approved after some additional observations from the EU. Our members immediately grasped the opportunity to examine, in consultation with the Flemish administration, how new Operational Programmes could be drawn up to meet the new requirements and conditions. Although it was a race against the clock, we managed to submit the new programmes for all producers' organisations in time for them to take effect permanently on 1 January 2023.

New emphases on environment and climate

The new EU programmes include new emphases. There will be more focus on climate and environmental issues in this new period, for instance. With the European Green Deal and the Farm to Fork strategy, the EU wants to take big steps towards greater sustainability and the fight against global warming. Europe wants to become a world leader in these areas and the implementation of the CAP will have to take this ambition into account. For producers' organisations, this specifically means that 15% should be allocated to environmental and climate measures when implementing the Operational Programmes.

Green Deal and Farm to Fork

The EU is steadily developing the Green Deal strategy and the corresponding approach to agriculture – Farm to Fork. 2022 was a very busy year in this area.

Discussions about the new directive on the sustainable use of plant protection products were continued. Together with our European colleagues in Copa-Cogeca, we monitored this discussion very closely and managed to convince politicians that the proposed approach is not feasible. This resulted in the European Parliament and the European Council asking for an additional study on the impact of said new directive.

Another political challenge that arose was in the area of packaging and limiting the use of plastic. On that note, various member states are in the process of transforming the EU directive. This leads to a lot of confusion. Each country comes up with specific measures that differ from the general directive, putting pressure on the operation of a single market. In Belgium, the first steps were also taken to translate this EU legislation into Belgian laws.

The Belgian Chicory Biennial 2022, a particularly tasty event

Chicory is one of Belgian horticulture's top products. Every two years, there is the chicory event par excellence: the Chicory Biennial. This year we hosted the event after several years of postponement due to Covid. The 25th edition of the Chicory Biennial in 2022 was one for the books.

First of all, it was a crowded edition. Too small a venue for the expected number of participants? We hadn't experienced that in a long time. We welcomed more than 160 participants from more than seven different countries. For us, this was proof that such events are not at all outdated. On the contrary. Although people need knowledge and information, what they need even more – as participants' interactions showed – is meeting colleagues from various countries. This was noticeable not only among growers, but also among researchers, scientists, representatives, marketers and in the number of supplying companies. The location of the biennial made this edition extra special. It was held at the De Krop cultural and experience centre in Kampenhout. A logical choice, as the town is home to the chicory museum. The municipality of Kampenhout renovated the centre in cooperation with the Province of Flemish Brabant, and with financial support from BelOrta. The result? A beautiful facility with all

modern amenities that also allowed the biennial to proceed smoothly from a technical point of view. Moreover, this location symbolises the bridge between the past – with the museum – the present and the future of chicory cultivation.

Chicory production is a rather small sector in the EU but that does not make it any less dynamic. The chicory sector is primarily clustered in four member states, the Netherlands being the leader with an economic value of almost €29 million in 2021. Belgium and France are also important countries, with a trade value of €18 million and €8 million respectively. Germany is the fourth producer, with a trade value of €1 million. After years of declining productions, we have noticed that these are now more or less levelling off. One trend that is true for both Belgium and the Netherlands, however, is the declining number of growers. In 2021, there were 200 chicory growers in Belgium and 55 in the Netherlands. Ten years ago, there were 318 in Belgium and 100 in the Netherlands. Exports to third countries are mainly driven by the Netherlands and Belgium. Chicory is mainly exported to Switzerland, the United Kingdom and the United States of America. Chicory exports are showing a downward trend. Belgium is increasingly exporting less, while exports from the Netherlands are rising slightly.



The conference covered a variety of topics in terms of content, both in presentations and the panel discussion. Representatives of the research institutes gave insights into their research activities in several highly appreciated presentations. Of course, the current polycrisis was the main topic of conversation in these uncertain times: the sharply rising production costs (electricity, fertilisers, plant protection products...) on the one hand, and the difficulty of getting a fair price for our products on the other. Considerable attention was also paid to opportunities for marketing chicory and attracting consumers with a particular focus on young people.

The Gesellen van het Witloof society from Kampenhout closed the biennial. They had the privilege of handing over the flag after the successful 2022 edition to the German colleagues, who will organise the Chicory Biennial in 2024.





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