Facing the future with confidence

VBT

ANNUAL REPORT 2025

COLOPHON
Responsible publisher
Luc Vanoirbeek
Concept *Daan Paredis*
Lay-out & editing *XPAIR Communication*
Printing *Drukkerij Van der Poorten*
100% climate-neutral printing

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2025: Strong production is an anchor in turbulent times

How did VBT make a difference?

2025 was a turbulent year for the cooperative fruit and vegetable sector – and therefore also for VBT. In terms of production, trade and politics, we found ourselves in the eye of several storms, yet we weathered them strongly. Today, we face the future with confidence.

Alongside the geopolitical conflicts in the Middle East and Ukraine, the return of U.S. President Trump caused global destabilisation in 2025. **The unpredictability of international trade** placed a heavy burden on the future plans and investments of producers' organisations in the fruit and vegetable sector.

Closer to home, **the EU further reduced the agricultural budget, and the Common Market Organisation (CMO) risked becoming far less common**. This could lead to increased competition between member states, sectors and producers' organisations. VBT raises its eyebrows at these choices.

Other factors shaping the future of our sector included **the accelerated energy transition and the limited availability of adequate plant protection products and labour**.

A positive in 2025? The weather. Our producers achieved a large harvest of both vegetables and fruit. Despite higher supply volumes, the total turnover of VBT members decreased by **2.45% compared to the record year 2024**. We reached **a turnover of €1.377 billion** across the fresh market and the frozen market. Turnover, however, does not equal profit. Revenues are accompanied by even faster rising production costs and increasingly strict production requirements.

Throughout all this, VBT actively defended the interests of our sector.

Luc Vanoirbeek
General Secretary

Dirk Van den Plas
President

Sustainability: **back to basics**

The issue?
2025 revolved mainly around the ambitious sustainability agenda introduced by the previous European Commission. VBT made its mark on several policy dossiers in favour of the cooperative fruit and vegetable sector.

How did VBT make a difference?

- **At European level, VBT actively contributed to the development of an objective methodology to calculate the Product Environmental Footprint (PEF).** This initiative, led by Freshfel Europe together with several major players in the fruit and vegetable sector and supported by Wageningen University, aims to enable fair and objectively verifiable comparisons of the environmental impact of different products across regions.
- **In Flanders, VBT contributed to the improvement of water quality within the framework of the Manure Action Plan MAP7.** We acted together with agricultural organisations and partners such as B3W (advisory service for better soil and water quality), Belgapom and Vegebe. The initial focus lay on training crop advisers because of their strong link with the everyday

practice. We are convinced that greater insight into fertilisation practices leads to improved water quality. In 2025 we took significant steps in this dossier. The Care4Growing app, developed by VBT members, already provides insight into fertilisation and will become even more important in the future.

- **VBT regularly raised concerns in various forums about the proliferation of administrative burdens related to sustainability. This advocacy bore fruit: the issue was placed on the agenda of the European social dialogue for horticulture.**
Administration should be a means, not an end in itself. Yet the fruit and vegetable sector is confronted with a growing proliferation of quality systems that, under the motto "better to control than to trust", impose requirements without providing clear added value. This must stop. Together with the European colleagues of Copa-Cogeca, VBT conducted a study to map all the requirements imposed by the various specifications and certification schemes. With this overview we approached several European forums, although it remains difficult to gain sufficient attention for this issue. Nevertheless, VBT continues to pursue this matter.

Plant protection: **recognition of the major challenges producers face**

The issue?
On the one hand, 2025 saw an increase in the number of diseases and pests emerging as a result of climate change. On the other hand, growing pressure continued to reduce the availability and use of plant protection products. This is a potentially dangerous combination. Without an appropriate toolbox, fruit and vegetable production simply cannot exist. This topic represents one of the greatest challenges facing our sector. At the end of December 2025, the European Commission presented the first "Omnibus" proposals aimed at simplifying existing rules on the use and approval of plant protection products.

How did VBT make a difference?

- **VBT advocated a well-considered approach to this dossier in several international forums, together with Copa-Cogeca, Profel and Freshfel Europe. We continue this advocacy in 2026.**
First and foremost, we call for greater realism. The priority for our research institutions is the development of alternative plant protection solutions that effectively combat diseases and pests while minimising environmental impact. To achieve this, the approval process for alternative bio-based plant protection products must be shortened. Europe currently lags behind other continents in this area, which discourages major plant protection companies from investing in the EU. We also advocate fair play in international trade. The EU cannot impose strict standards on its own producers while allowing imported products that do not meet those same standards.
- **VBT contributed to discussions on the sustainable use of plant protection products in the European Parliament.**
Although this debate stalled midway through last year, it is far from over.
- As a third-party organisation, VBT can request extensions on authorisations for plant protection products used in minor crops, which include most fruits and vegetables. **To identify bottlenecks and find solutions, VBT maintained continuous dialogue with its members, authorities, research centres and phytopharmaceutical companies.** When necessary, emergency authorisations were requested.
- **VBT closely monitored research and legislation concerning plant protection products and communicated developments to stakeholders.**
Together with research centres, we identify promising applications for future trials aimed at obtaining approvals. Approved applications and regulatory updates are integrated into the Care4Growing platform, which also bundles the latest European, Belgian and Flemish legislation on plant protection. For each crop, VBT prepares advisory sheets listing all authorised plant protection products. This allows producers to check their planned treatments with the most recent regulations.
- **VBT coordinated the sectoral monitoring plan for residues of plant protection products, microbiology and heavy metals.**
Monitoring was carried out by VBT members based on a risk analysis. We will continue working with the results of this monitoring.
- **By supporting research and development in fruit and vegetable production, VBT contributes to innovations that allow the Belgian sector to distinguish itself internationally.**
We remain convinced of the power of innovation and the importance of research institutions. One thing is certain: many changes lie ahead for our sector.

European agricultural policy and the Common Market Organisation: **what about the CMO?**

The issue?
With the appointment of the new European Commission and the new Commissioner for Agriculture, the EU's attitude towards agriculture began to shift. Commission President U. von der Leyen strongly emphasised dialogue and acknowledged the strategic and crucial role of agriculture and horticulture as food producers. However, this positive tone was not reflected in the EU's multiannual financial framework. On the contrary: the EU reduced the agricultural budget and moved away

from the common approach to agricultural policy. This is a dangerous development. Member states are gaining more freedom to introduce their own national priorities in agricultural policy, which could lead to a proliferation of additional legislation and administrative burdens. This represents a major step backwards for European agricultural policy, which may no longer deserve the label "common".

How did VBT make a difference?

- **VBT actively participated in several European forums and defended the interests of the fruit and vegetable sector.** We strongly believe that, in this globalised world, the EU is the most appropriate level at which to address our sector's challenges.
- Flanders has always been a pioneer in the cooperative organisation of markets. In 1996, VBT and LAVA were the driving forces behind the development and implementation of the Common Market Organisation (CMO). **In 2025 we were closely involved in discussions on the future of the CMO. Through numerous conferences and meetings both in Belgium and abroad, we consistently attempted to refine the European Commission's proposals**. We remain convinced that the CMO is of invaluable importance to strengthen producers' positions within the supply chain, particularly through strong horizontal concentration. However, the EU is currently undermining the strength of the CMO through reduced financing and the renationalisation of what had been a common policy for more than sixty years.

Promotion policy: **fruit and vegetables as part of healthcare**

The issue?

Consumption of fruit and vegetables is declining. In the long term, this could become a threat to public health. Promoting the consumption of fruit and vegetables contributes to preventing lifestyle diseases such as obesity and type 2 diabetes. Fruit and vegetables should therefore have a clear place within healthcare policies.

How did VBT make a difference?

- VBT plays a very active role in promoting fruit and vegetables. For this purpose, we work closely with VLAM (Flanders' Agricultural Marketing Board), the recognised centre of expertise for the promotion of fruit and vegetables. **In 2025, the fruit and vegetable sector invested €3.42 million in promotion activities. These funds were used both domestically (campaigns) and internationally (trade fairs and promotional events)**.
- Effective and consistent promotion of fruit and vegetables requires a coordinated approach at EU level, not just from an administrative perspective. **The expertise developed by VLAM is essential in this context, and VBT played a connecting role**.
- The EU supports promotion campaigns in markets outside the EU, such as China and Brazil. In 2025 the EU provided substantial co-financing of up to 80%. **Within these cooperative frameworks, VBT contributed to the optimal use of European funds and to the effective implementation of international promotion campaigns**.
- On 25 and 26 June 2025, the Interpera Congress in Hasselt was organised by VBT and AREFLH (assembly of European fruit, vegetable and horticultural regions). The congress united visitors from around the world to learn more about our pear production and the organisation of our sector. Despite our limited size, we play a pivotal role in the European pear market. During Interpera, our expertise was accentuated. Visitors gained insight into our efficient and intensive cultivation methods, storage techniques and the strong organisation of the sector. Pcfruit and VCBT presented their work on storage technologies, data management, dynamic controlled atmosphere and precision farming. A visit to BelOrta illustrated the strong cooperative organisation of the market. **Through Interpera, VBT and its partners positioned Belgium as the global knowledge hub for the pear sector, strengthening the relevance of Belgian fruit production at the European level**.

Export: **breaking down international barriers**

The issue?

International trade remained under pressure in 2025. Geopolitical conflicts in Ukraine and the Middle East continued to create uncertainty in global markets. The unpredictable policies of the U.S. administration and tensions between major global trade blocs (the United States, India, China and the EU) formed a volatile combination. In such a context, the temptation to retreat to domestic markets and adopt protectionist measures is strong. However, as a strongly export-oriented country, Belgium cannot afford to isolate itself.

How did VBT make a difference?

- **VBT continued to explore opportunities in promising international markets.** International trade and exports are vital for the long-term future of our sector. Opening new markets and removing phytosanitary barriers, often require years of effort. VBT therefore remains vigilant for opportunities, ensuring that we can strike swiftly when a new market opportunity arises.

Transparency in fruit and vegetable trade: **sharing reliable data in Europe**

The issue?
Transparency has been a central theme in European agricultural policy for many years. As early as 2016, Commissioner Ph. Hogan and C. Veerman recommended in their report “Agricultural Markets Task force” that the EU should: increase market transparency, combat unfair trading practices, and strengthen producers’ organisations. These recommendations have once again returned to the European Commission’s agenda.

How did VBT make a difference?

- **VBT holds valuable data on fruit and vegetable sales. In 2025, as every year, we shared this information transparently with our members and with the Flemish and European authorities.**
  We are convinced that greater transparency ultimately benefits the market. This philosophy is also reflected in the way we market our products: the auction clock remains the central mechanism for balancing supply and demand.
- **In 2025 significant efforts were made to make this data more accessible.**
  The focus lay on visualising figures through clear graphs and tables. In addition, we can now acces the latest international statistics based on Eurostat and FAO data – crucial information for our members.
- **VBT played a central role in compiling acreage estimates and harvest forecasts at both Flemish and international level.**
  Together with WAPA (World Apple and Pear Association) and Copa-Cogeca, VBT organised the European harvest forecasts for apples and pears.
- Producers’ organisations are crucial in ensuring market transparency. They provide strong protection against unfair trading practices. **In Flanders, where around 80% of the sector is organised in producers’ organisations, VBT as an umbrella organisation can have a significant positive impact on the future development of the sector.**

The DNA of cooperatives in the fruit and vegetable sector

The cooperative is:

A guarantee ...
... for quality, availability, food safety, logistical performance, fair sales, sustainability, investments in research and development.

In short, for the reliable and continuous delivery of various benefits that the market demands, and this on a large scale.

Together...
... sharing knowledge, working together as equals, taking steps and helping each other where necessary.

In this way, we pull together and generate benefits for the growers and the market.

Strong...
... as reliable partner throughout the chain. We can use our scale to meet any demand quickly and efficiently.

United in a cooperative, growers have extra clout on the market.

Impact...
... on the trade for the benefit of the horticultural sector. Together, we drive (cultivation) innovation through investments in research and development. The cooperative is the grower’s voice in important debates.

The cooperative formulates answers to challenging questions from the market.

Care...
... for the collective, both economically and socially. With a flourishing future in sight.

The cooperative is much more than collecting and selling products.

“We’ve weathered crises for 120 years thanks to the strength of the cooperative”

“BelOrta summarized? From, for and by growers. Without growers, there is no future. They are our greatest strength”, says BelOrta managing director Philippe Appeltans. The future of the auctions runs parallel to the future of the producers. The challenges are numerous, but Appeltans – and with him all of BelOrta and VBT – is rolling up his sleeves to work on solutions.

As a little boy, Appeltans rode with his grandfather on his horse and cart. If it had to go faster, he had to whip ‘the good horse’, “because the bad horse won’t move anyway.”

To this day, Appeltans often remenisces about those words of his grandfather. “The same thing is happening to our sector. We are the best horse in terms of innovation, efforts for sustainability, health and so on, yet we are hit by measures time and time again. We have to turn that around.”

Crisps and chocolate in bulk

Appeltans sees this pattern recurring in various dossiers: packaging legislation, entrepreneurial space, plant protection, sustainability...

“Of course we want less packaging. The Belgian auctions are at the cradle of reusable crates, which serve as an international example. Reduce, reuse, recycle – we have been committed to this for years. And yet, suddenly, we are no longer allowed to use plastic for fruit and vegetables consumer packaging. Broccoli without thin plastic? After an hour, it turns yellow. Just try wrapping raspberries in paper. That’s impossible.”

What bothers him most is the asymmetry in the debate. “I rarely hear that crisps have to be sold in bulk, or that foil is no longer allowed around a chocolate bar. But with fruit and vegetables, there is an unbridled debate.”

A frog pool is not enough

On entrepreneurial space, Appeltans gives an example that everyone in the sector recognizes. “Try obtaining a permit for a new greenhouse. I know growers who have been working on the paperwork for ten years. Even if the neighborhood agrees, even with extra efforts – adding a frog pool, planting a piece of forest – it is often not good enough. The same happens for orchards. Innovation is stifled and we lose our competitiveness.”

According to Appeltans, regulations in plant protection products have gone out of bounds as well. “Nobody uses substances ‘for fun’. When we use them, it is done very precisely. Faced with a disease or an insect plague, you have to be able to intervene."

"Active substances are being phased out on the basis of 'possible risk' and we have to use green alternatives. Fine for us, really, but in Europe it takes ten years before they are authorised. Elsewhere in the world the process time is two years. And here we are, with new plagues and without resources."

And that touches on a key issue for the Belgian sector: quality. "We are only a small player in Europe, but we are known for our quality. If we no longer have the tools to guarantee that quality, we lose our advantage and then what future remains?"

Greater forces

Globally there are even greater forces at play, such as climate change. "Longer droughts, heavy rain, storms and extreme heat all have an impact on our production."

At the same time, the pressure on CO_2 reduction increases. "14 years ago, VBT launched the Responsibly Fresh concept and since 2022 BelOrta has an SBTi-validated CO_2 reduction plan. We want to take collective responsibility for our growers. Some retailers demand to only work with the 'five most sustainable' growers, but we resist to that. Investments run in cycles. Those who invested five years ago may be ahead today. In five years' time, that may be different. We want to include everyone."

So within VBT we closed ranks for a unit-by-product approach. "We have set emissions per kilo of product and are trying to improve that number as a sector. That is fairer and more effective."

Race to the bottom

On the market side, Appeltans deplores that retailers are continuing the race-to-the-bottom. "2+5 actions undermine the perception of value. The consumer starts thinking: at other times I pay too much. While he actually pays too little for what it takes to produce quality."

"In 2025, there was a certain time when Belgian supermarkets sold raspberries from distant imports because they were cheaper, while our own raspberries went abroad where people did pay for quality. That's the world upside down, isn't it?"

We are only a small player in Europe, but we are known for our quality. If we no longer have the tools to guarantee that quality, we lose our advantage and then what future remains?

No shine without friction

To withstand all that pressure, there is the strength of the cooperative, Appeltans believes. "BelOrta is the result of mergers of several auctions. Our oldest branch dates from 1905. For 121 years, we have been able to adapt to the needs of the time as growers and cooperatives. Collaboration brings strength, resilience and innovation. We have already endured countless crises like this, and it will be no different now."

And if cooperatives also join forces in VBT as an umbrella organisation, Appeltans is completely positive about the future. "All our expertise comes together in VBT, which speaks for the sector with one strong voice. Legislation, sustainability, packaging, quality systems, plant protection... We should not compete with each other on this, but work together. As we do well today. The differences between the auctions is the richness of VBT. No shine without friction.

All these insights lead to a stronger whole. If we continue to tackle the major challenges together, I am confident that we will also emerge stronger from this difficult period."

BELORTA
Producers: 1100
Product turnover: 605 milion euros
Top products:
tomatoes, cucumbers, pears

"Confidence in the future? Of course, have you seen the quality that our growers produce?"

HOOGSTRATEN

How to keep confidence in the future when you find yourself in the middle of a perfect storm? Coöperatie Hoogstraten managing director Hans Vanderhallen finds the answer nearby. "What gives us the most confidence is simply the product we work with: fruit and vegetables. The climate crisis and public health are pointing in the direction of more plant-based food, more attention to health. That is exactly what we offer. And moreover, our growers produce at an unprecedented level of quality."

With a simple calculation, Vanderhallen reinforces his optimistic vision of the future. "The population is growing. If people follow the general nutritional advice, there are too little fruit and vegetables worldwide. In that sense, there is a lot of potential for our sector. If we can make the leap — in terms of energy, plant protection, and personnel — the future looks promising. And if the growers are doing well, the cooperative is too."

In Dubai it becomes clear how small we are

But the challenges for the sector are significant, Vanderhallen acknowledges. "There are the challenges for producers: energy, climate, plant protection, workforce. There are the challenges for the cooperatives: staying relevant and ensuring that growers achieve a sustainable return. And then there are the societal challenges: food security, regulations, spatial planning. It is all connected."

Vanderhallen refers to a recent international fair in Dubai. "Right there, it becomes clear how small we are in the bigger picture. Countries are investing massively in logistics, digitization, and cold chains to guarantee food security. Production alone is not enough. The entire supply chain is at least as important. Only if we continue to work together in Belgium, as we do today, we can play a role."

Coöperatie Hoogstraten was founded in 1933 by growers who believed that together they were stronger. That principle has proven its value time and again. Even in the current challenges, Vanderhallen sees the strength of cooperatives, united in VBT, as an important part of the solution. "Collaboration within and between cooperatives is becoming more important than ever. VBT does an excellent job in advocacy, research, and consultation, allowing us to join forces."

Expertise included

Two years ago, Coöperatie Hoogstraten developed a new strategy. The priorities are clear: sustainability, knowledge, digitization, operational excellence, and growth. “Knowledge is crucial for us. We want to sell much more than just a product. If someone in Europe has a question about strawberry cultivation, varieties, packaging, or storage – then Belgium, and specifically Coöperatie Hoogstraten, should be the answer.”

The cooperative is actively building this knowledge base, including through intensive cooperation with the Research Centre Hoogstraten. “Anyone who buys strawberries from us also buys that expertise.”

Digitization is a second pillar. “For a number of large growers, we manage the entire IT environment. Their ERP system runs on our software. It is a service through which we as a cooperative create clear added value, also for large growers.”

Automated packaging

As for operational excellence, Vanderhallen gives a clear example from within the strawberry cultivation, together with tomatoes and peppers the most important subsectors for Coöperatie Hoogstraten. “In the past, a grower would get empty boxes, take out containers himself and place them in the box manually. In a large company, two to three full-time employees would be busy with this every day.”

That is why Coöperatie Hoogstraten invested in automated packaging lines. “We have installed machines that fold the cardboard boxes and automatically place and fill the containers. It is a significant investment with a direct impact for our

growers – one they would not be able to bear alone.” On top of that, the system has also been digitally refined. “Each container will have a unique QR code. Eight containers are read and linked to one box, and 144 boxes to one pallet. The consumer can scan the code and see the grower’s story, which is great promotion. Transparency and connection in one system.”

Vanderhallen sees growth as supportive. “We want to grow in order to achieve those four other priorities without increasing the cost for our growers.”

Taste remains the most important

Perhaps the most important step towards future-proofing is the new joint auction system ‘ClockAuction’ with BelOrta and REO. “The old clock system had reached its limits. We had built all kinds of additional systems to make certain segments visible. That was no longer efficient.”
The new system is fully digitized and integrated. “It

My confidence comes from the basics. Our product is healthy, tasty and in high demand.

means we can respond more quickly to new ideas and market demands, and buyers can connect more easily. That is important.”

For Vanderhallen, the essence of the clock remains unchanged. “You need relevant supply, a reliable quality policy, and enough buyers. If there is one box too few, the price rises. One box too many, and it drops. That balance can tilt over very quickly.”

“The most important trigger for a repeat purchase is still taste. That remains decisive. If we say that a product has a certain quality, the market knows what that means. That trust is crucial. Convenience, sustainability, and transparency are self-evident these days.”

No reason for pessimism

All things considered, he is confident about the future. Vanderhallen smiles. “I notice that our growers continue to invest and grow. Customers want to commit more than before in the long term to secure product availability. Those are excellent signals.”

“But my confidence mainly comes from the basics: our product is healthy, tasty, and in high demand. As long as we as cooperatives keep on working together in VBT, strongly supporting our growers, distinguishing ourselves with our knowledge, and continuing to adapt to the market, I see no reason to be pessimistic.”

COÖPERATIE HOOGSTRATEN
Producers: 165
Product turnover: 375 million euros
Top products:
strawberries, tomatoes, bell peppers

“Together we are a force to be reckoned with”

Behind the shortened name (the word “auction” has disappeared), the refreshed logo, and plans for a new building, REO is making a strong strategic change of course. With a supported roadmap, seven strategic pillars, and a far-reaching master plan for the warehouse, the cooperative is redesigning its operations from the inside out. managing director Filip Vanaken opts for scale, cooperation, and future-proofing, while at the same time warning against fragmentation.

“We are more than an auction”, Vanaken says. “Hence short and sweet: REO. Because we do much more than just selling?” The name change is the result of a strategic process that started in early 2023. Under the name REO 2.0, the management team, together with the board of directors and the growers, mapped out a new course.

The focus was listening to growers throughout West Flanders, with extra attention for the new generation. “The future is not with people of my generation”, Vanaken says. “It is up to the young ‘force’ that has to keep moving forward for another 40 years. They think differently: more entrepreneurial, more assertive. More independent too. That is fine, provided they do not play solo, because then they risk losing. They should not forget why cooperatives were ever founded.”

That reason is more relevant today than ever. Growers are becoming bigger, more professional, and more capital-intensive. At the same time, the demand side is consolidating at lightning speed. “No matter how big you become as an individual company, you are never big enough to compete with retailers who have billions in turnover. Negotiating individually may seem attractive, until market power becomes unbalanced.”

Maximum market access

According to Vanaken, confidence in the future is a result of working together without naivety. “A clock does not make a price. It shows the market, which is determined by supply and demand. Economic laws do not disappear.” That is why REO wants to focus on maximum market access for its growers. The more sales channels, the stronger their position.

The rebranding also fits within that logic. For years, Tomabel and Fine Fleur were strong quality labels, but they were separate from the REO name itself. “Who outside the industry knew that Tomabel or Fine Fleur were actually REO?” That is why REO opted for one clear brand architecture with the main brand at the center. “Today, we work with REO Sublime (top quality), REO Terra (traditional and open-field crops), and REO Nova (new products). If we build brand value now, we build it for everyone. This strengthens involvement within the cooperative.”

This strategy also translates operationally. The master plan for the warehouse links sustainability, efficiency, and process optimization. “We are replacing old cooling installations, separating supply and inspection processes, and making night deliveries possible. We are tackling everything at once: opening hours, noise pollution, food safety, energy efficiency, logistics… We are in the middle of a process revolution.”

Vanaken sees sustainability as self-evident in all this: “A good business is a sustainable business. Sustainable means ‘to last’. Those who use their resources efficiently will also see this reflected in their results.” At the same time, he warns against the strategic use of sustainability criteria by large buyers to put pressure on growers.

A good business is a sustainable business. Sustainable means ‘to last’.

European core of fruit and vegetable production

He also sees structural challenges. Land and capital are becoming determining factors. Private equity is increasingly finding its way into greenhouse horticulture companies. “I do wonder whether external investors are willing to bear two or three difficult years. Family businesses do. That is a strength of our sector.”

Climate change is also creating a new reality. While Southern Europe is struggling with extremes, our region remains relatively moderate. “Our region can grow into a European core area for fruit and vegetable production.”

In that broader picture, Vanaken sees a clear role for VBT. “Alone we are vulnerable. Together (REO, BelOrta, Hoogstraten) we represent 80 percent of Belgian vegetable production. If we draw clear lines together, we can protect our growers against imbalances of power.”

For Vanaken, confidence in the future is not blind optimism, but a conscious choice for cooperation, scale, and strategic innovation. “We do not work for shareholders who want to maximize profit. We work for growers. That difference changes everything.”

REO
Producers: 700
Product turnover: 231 million euros
Top products:
tomatoes, leeks, chicory, strawberries

“We give innovation a strong push”

INGRO

While price negotiations are becoming tougher and plant protection products are under pressure, INGRO is investing heavily in precision technology and mechanisation. Through collective purchases of smart spraying robots, drone training, and intensive guidance for growers, the organisation is firmly choosing technological acceleration. For director Hilde Dhuyvetter, confidence in the future is not a matter of hope, but of action.

“It was a particularly difficult year in terms of price formation”, says Dhuyvetter. INGRO works entirely on a contract basis for the frozen vegetable industry. Prices are negotiated in advance, but due to difficult market conditions the discussions dragged on for months. “Two difficult sales years for buyers, high stocks… But the question remains: should the producer always be the first to make concessions?”

The pressure on the sector is tangible – economically, but also in terms of regulation. The debate on plant protection is becoming increasingly intense. “At a certain point those products simply risk disappearing. But then again, how are we supposed to continue growing high-quality vegetables?”

Taking matters into our own hands

INGRO chooses not to remain stuck in the debate, but to develop alternatives. A striking example is the use of Ecorobotix, a precision sprayer based on machine learning. Cameras recognise the crop and distinguish it from weeds, after which only the weeds are treated locally.

The result: up to 90 percent fewer use of plant protection products, without drift and with greater safety for farmers and the environment. “That is precision agriculture in practice”, says Dhuyvetter. “We already have several machines in our equipment pool. They are expensive, but together we can offer them to our growers.”

In this way, cooperation becomes a lever for innovation. Growers can reserve the machine, receive guidance, and see through demonstrations that it works. “Without initiatives like this, it is almost impossible for individual growers to jump on that train.”

Mechanisation, drones, and robotisation are no longer futuristic ideas. They are the current response to several challenges at once: stricter regulations, rising costs, and a severe labour shortage. “Labour may well be the biggest concern today. Finding seasonal workers is becoming more difficult. Keeping them is even more complex. Cultural differences, uncertainty, legislation… It is a daily reality for our growers.”

INGRO shows what works

That pressure is also reflected in crop choices. Some producers switch to crops that are easier to mechanise. Others invest in technology to replace labour. “As an entrepreneur, you constantly have to reinvent yourself. The same applies to us as an organisation.”

> *Labour may well be the biggest concern today. Finding seasonal workers is becoming more difficult. Keeping them is even more complex.*

INGRO positions itself as a knowledge and support partner. Cooperations with practical research centres such as Inagro, Viaverda, and universities are structural. New techniques are tested in trial plots and growers receive guidance in the field. “We show what works. We guide growers. We repeat demonstrations. That accelerates adoption.”

At the same time, Dhuyvetter notices major climatological shifts. While Southern Europe is struggling with water stress and extreme weather conditions, Northwestern Europe remains relatively stable. “And our region is strong in terms of mechanisation and quality. Technologically, we are ahead.”

But that advantage comes with a price. “You also have to get paid for that quality. And that is not always self-evident.”

Sustainability plays a double role in this context. Reporting obligations may be easing, but the pressure from buyers remains. “Our customers have to report, so that topic also lands on our desk. But real sustainability is not a paper exercise for us. It is about real progress in the field.”

In this landscape, Dhuyvetter sees a clear role for VBT, particularly in lobbying and European dossiers. The uncertainty surrounding future CMO subsidies and co-financing requires sector-wide strength. “By working together, we are stronger. We gain access to information faster and can act more quickly. That makes a difference for our growers. As a sector, we must continue to show that we want to move forward. Otherwise, moving forward will become impossible.”

INGRO
Producers: 800
Product turnover: 165 million euros
Top products:
cauliflower, Brussels sprouts, leek, beans

“Alone you go faster, together we go further”

The Flemish fruit and vegetable sector faces a long list of challenges: geopolitical uncertainty, rising costs, stricter regulations, climate change, and more. Nevertheless, Maarten De Moor, director of LAVA, looks to the future with confidence.

While VBT defends the interests of cooperatives and their members on (inter) national policy platforms, LAVA focuses on getting cooperatives to work together across various areas: commercialization, quality, research, digitization, and more.

Although operating with different assignments, VBT and LAVA complement each other perfectly, according to De Moor. “What VBT achieves at the political level is often supported by our practical work. For example, when European quality rules change, VBT informs itself on the issue and forwards the information to LAVA. We then analyze what it means in practice for the sector and provide that input in return. This way, we strengthen each other and our common members, the cooperatives.”

Decisive in Europe

According to De Moor, the role of producer cooperatives is more important today than ever. Retailers are becoming larger, increasingly international, and are pooling their purchasing power. This requires an equally strong organization on the producer side.

“Cooperatives make individual producers stronger in the market. By working together, we can concentrate supply. This is essential to remain relevant and avoid becoming a toy of the market. In addition, thanks to our growers, we can offer products of the highest quality, which are always in demand.”

A vital instrument in our cooperations remains the auction clock. The system has existed for more than a century, yet it still determines pricing in Europe today. “The clock allows us to offer our concentrated supply to the market in a transparent way. The whole of Europe looks at the price we set and then undercuts it. This way we always get the best price from the market. We are a small country, but because we bundle supply and offer it through the clock, we are still decisive in Europe. That is why it was so important to thoroughly digitize that clock and further integrate it with all our members — a project that we as LAVA are helping to support.”

Artificial intelligence in cultivation

Innovation and research are key drivers for the future, De Moor believes. "Digitisation is becoming increasingly important. For example, together with the cooperatives we have developed Care4Growing, an app in which growers register data from their cultivation and business operations. By collecting and analyzing that data, we can continue to work smarter over time."

Artificial intelligence will also become decisive in business operations. "With camera technology, for example, we can recognize diseases or pests more quickly and combat them very precisely. Or we can use image analysis to estimate the quality of products even before they enter storage, ensuring optimal storage. Picking robots can take over the work of an increasingly scarce labour force. The possible applications of AI will only continue to grow in scale and quality. Collaborations on this make it possible to maximize that potential."

300 million consumers a stone's throw away

The Flemish fruit and vegetable sector has another clear and undeniable advantage: its geographical location. "We are on extremely fertile soil with a favorable climate, right in the heart of Europe, in the middle of an important market. If you draw a radius of 300 kilometers around Brussels, you reach about 300 million consumers. Our logistics are efficient and distances are relatively short. That will always give us an important competitive advantage."

With camera technology, for example, we can recognize diseases or pests more quickly and combat them very precisely.

People will continue to eat fruit and vegetables

Despite the challenges, De Moor remains optimistic about the future of the fruit and vegetable sector. "Fruit and vegetables are healthy products. People will continue to eat them forever. Demand remains strong, and the global population is growing."

De Moor's conclusion? The key to a successful future lies in the continued development of the already strong cooperation within the sector, which provides stability in a turbulent world. "Conditions are constantly changing: geopolitics, energy prices, regulations, climate. But by working together, we can respond better to those changes. Alone you may go faster, but together we can go further."

“Hope is a decision”

With approximately 750 employees, administrator-general of ILVO Joris Relaes leads the largest Flemish research institute for agriculture, fishing, and food. From soil research to test fields to taste labs, the institute takes on the entire chain, ‘from soil to plate’. What is being tested today in Merelbeke or Melle may be accepted in practice in four to eight years’ time – depending on regulations, the extent to which companies develop a business model around it, and consumer taste.

Climate pressure, soil depletion, and economic uncertainty are putting pressure on the agricultural and horticultural sector. But there is no need to panic, because “our food will be fine”, says Relaes – which is also the title of his new book ‘Het komt goed met ons eten’, in Dutch.

“Or better yet: it is our job to make sure that things work out. That is why we put the slogan ‘Hope is a decision’ on the wall here. Not in a Christian way, ‘waiting for good to fall from heaven’, but hope in the meaning of: let’s get started and make the best of it.”

Pilot factory

ILVO is a pioneer. New varieties of soy or chickpeas, applications for protein diversification, precision agriculture, sensor technology in livestock farming… they are developed, tested, and validated here. But ILVO does not commercialize its innovations itself. “We are not allowed to. We develop, companies pick it up. Or not. After us, the market decides. To increase the chance of success, we try to involve companies in our research as early as possible. We are often four to eight years ahead of what may later enter practice.”

Whether innovations effectively break through depends on more than technology alone. Regulations can slow things down, but consumer behavior also plays a decisive role. “What the consumer ultimately chooses is decisive – therefore taste and ease of use are crucial.”

A telling example are new protein products. ILVO develops varieties, tests

cultivation techniques, and produces soy drinks, burgers, or other applications in its own pilot factory. “We don’t talk about a protein shift, but about protein diversification. There will still be meat. But we also have to develop alternatives.” In a sensory lab, trained panels assess taste and texture.

Tech and soil

According to Relaes, climate is the central challenge, with many related issues: water management, biodiversity, soil quality, and emissions. But he warns against paralysis caused by ideological discussions. “We continue to discuss 42 or 47 percent CO_2 reduction. In the meantime, nothing is happening. We have to start now. By trial and error.”

He sees the solution in a double movement. “On the one hand, technology: drones, artificial intelligence, sensors, smart robots. On the other hand, a rediscovery of the basics: the soil as a living ecosystem.” Technologically, agriculture is accelerating rapidly. In livestock farming, animals are monitored individually through sensors that continuously collect data on behavior and health. In the field, the focus is shifting to precision applications: more targeted fertilization, treatment, and monitoring instead of uniform input across an entire field.

At the same time, current science is correcting old assumptions. “During my training as an agricultural engineer, I learned that soil is a substrate: you add fertilizers, water, and plant protection, and you get production. That is wrong, or at least too simplistic. Soil is a living system full of microorganisms that determine resilience and productivity. We are rediscovering that.”

For Relaes, there is no contradiction between high-tech and tradition. “We don’t have to return to the past. But we do have to take the basics seriously again and combine it with the most modern technology we have.”

Redrawing the organizational model

Relaes also sees an evolution at the organizational level. “The classic family farms remain a strength of Flemish agriculture. Agriculture is the only economic sector that works with living material. That requires a 24/7 approach.” Yet that model is under pressure.

Land prices can soar up to 100,000 euros per hectare and in some regions even up to 200,000 euros. “That is not economically justifiable. You can’t possibly earn that back in one generation.” Those who do not already have land, face an almost insurmountable entry barrier. On top of that, administrative burdens, permits, and increasingly complex regulations raise the barrier even more.

According to Relaes, a redesign of the organizational model is necessary, in which cooperatives can take on a broader role than mere commercialization. “Why shouldn’t cooperatives be able to take over land from members who are ceasing their activities and make it available to young entrepreneurs?”

He also sees a role for cooperatives in reducing the burden on farmers. Many small and medium-sized businesses struggle to bear the costs of technology, administration, and innovation on their own. Cooperatives can centralize support tasks so that farmers can focus on their core activity: growing and caretaking. “We have to ensure that those family businesses can continue to do what they are good at.”

The cooperative model may seem old, but according to Relaes it can be given new meaning, combining economies of scale with entrepreneurship without completely losing the family character.

“Anticipation on challenges always provokes opportunities”

As a preying eagle Freshfel soares over the European fruit and vegetable sector. Keeping a sharp eye on anything that rustles in the fields and orchards, ready to defend its territory at all times, strategically patient when needed. From that excellent point-of-view, General Delegate of Freshfel Europe **Philippe Binard** shares his vision on the future of the sector.

“Global trends that influence the fruit and vegetable sector the most nowadays? Haha”, Binard repeats and shrugs at the question. “I can give you a response which is valid today, which might not be valid anymore tomorrow. Business is marked by a significant lack of predictability due to external factors – that in itself is the major threat.”

Unpredictability

The lack of predictability is driven by the U.S. who have ended the multilateralism, climate change, and the volatility of European regulation, on which Binard further elaborates.

“**Climate change is here to stay and will further intensify**. It’s impacting food security and growing conditions. The European Green Deal has worsened the situation for growers. It withdrew tools that are crucial to mitigate pests and diseases, before viable alternatives were available.”

“**The European packaging legislation is a terrible headache**. It’s discrimination against fruits and vegetables, which are the only foods that are imposed a plastic packaging ban. Plastic allows for the best visibility of the product, which greatly influences the consumers’ choice.”

“Furthermore, **the European proliferation of measures regarding labelling creates a distortion in the single market and endangers the principle of free circulation under the same rule**. On the same topic, **the Common Agricultural Policy (CAP) will turn into national policies**, based on EU-guidelines. There will be more cherry-picking and greater differences which will be distortionary between member states. We will need to reassure at national level that fruit and vegetables are identified as a top priority.”

“Meanwhile, energy and labour prices are up. All added costs are pushed back to production, because of the fierce price competition among major retailers, certainly with fruit and vegetables.”

The nature of the fruit and vegetable sector

The challenges are enormous, but when tackled right, the opportunities are equally large. The nature of the fruit and vegetable sector inspires confidence in the future, Binard believes.

“The EU wants to adress climate change? We are part of the solution. Fruit and vegetable production has a low environmental impact. Orchards even have the capacity of sequestration, so **we contribute to the net zero ambition by means of food production**.”

“Meanwhile, the cost of health care is exploding because of unhealthy diets which instigate obesity, cardiovascular diseases, and cancer. However, it’s difficult to make an official health claim for fruit and vegetables because our sector is heavily fragmented. An apple is not another apple. Today, only Zespri has managed a health claim for kiwi’s, they spent 15 years submitting their dossier.”

“The EU decision makers claim they have the ambition to take steps for addressing societal concerns, but they don’t put their money where their mouth is. **In the current CAP, fruit and vegetables receive only 3% of the budget**, and those who contribute the most to emission and disease receive 80% of the budget.”

“As a point of reference, Europeans eat on average 350 grams of fruit and vegetables per day. 400 grams is the threshold for health, but we should add another 400 grams for combating climate change, so the goal should be 800 grams of fruit and vegetables per day. **If the EU aligns its policy with its ambition, there’s an enormous growth capacity for our sector, considering that each additional portion per day for EU citizens would mean an extra production of around... 15 million tons!**”

When in business

Confidence in the future is hard to maintain when you’re on the frontline with empty hands. Freshfel takes up arms to defend the sector, Binard says. “There’s a lot of challenges, but when in business: **anticipation always provokes opportunity**.”

“With the upcoming Vision on Agriculture and the CAP reform, it’s crucial to secure that producers’ organisations and the fresh produce sector can operate in the right circumstances to address future challenges. That includes **moving towards the most sustainable supply chain, being innovative in terms of packaging and developing new varieties**, so that the sector can fully unleash its assets with the lowest environmental impact and the highest health benefits."

"As a sector, we need to be adapting our products to market demand. Consumers have an increasing preference for ready-to-eat-products. **We have to anticipate to assure that we can continue gaining market share according to the evolution of the consumer expectation.**"

"Talking about the market, Freshfel wants to maintain the good functioning of the single market. Shipping to Germany, France or the UK shouldn't have any barriers. And in regard to export, the UK, which accounts to close to 50% of EU export, is the key destination. Therefore, **we are currently working on an SPS agreement between the EU and the UK.**"

This justifies confidence in the future

"Crucial in all of this, is that the sector speaks with one, united voice", Binard concludes. "VBT and their members are valued partners of Freshfel Europe. They are engaged, positive, innovative, and have professional and operational insights. **Together, we are a force to be reckoned with, and this justifies confidence in the future.**"

Organisational structure of VBT

As a non-profit association, we give our members a say and control through representatives in the general assembly, the governing body and various working groups.

In 2025, the general assembly took place on 21 May and there were seven meetings of the governing body, prepared within the management committee and coordinated by the chairman and the general secretary.

Specific dossiers are shared with the members in various working groups and/or ad hoc consultation moments:

- task force Simultaneous
- task force Production and Sales (P&A)
- task force Sustainability
- task force Logistics and Packaging
- task force Research
- sounding board group MAP
- Growers' Advisory Council for Plant Protection

The secretariat, under the direction of the general secretary is responsible for the day-to-day operations.

Chairman
Dirk Van den Plas

Vice Chairmen
Marc Smets
Dirk Declercq

General Secretary
Luc Vanoirbeek

Governing body

Ludo Adriaensen, Didier Algoet, Philippe Appeltans, Karel Bosschaerts, Guy Callebaut, Maarten De Moor, Chris Devroe, Hilde Dhuyvetter, Stefaan Kint, Peter Lenaerts, Danny Raskin, Filip Vanaken, Hans Vanderhallen, Pieter Van Houcke, Wim Vertommen

Representation at home and abroad

As a sector organisation, VBT represents its members in numerous organisations in Belgium and abroad. We consult with relevant parties, interpret common positions and defend the interests of our members.

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

- Civil Dialogue Group (CDG) on Horticulture, Olives and Spirits
- Market Observatory Pipfruit
- Market Observatory Tomatoes

Federal Public Services

- Advisory Committee of the Federal Agency for the Safety of the Food Chain (FASFC)
- Advisory Council, Cel Minor Uses, and the Plant Fund of the Federal Public Service Health, Food Chain Safety and Environment

Promotion

- Vlaams Centrum voor Agro- en Visserijmarketing (VLAM)

Agentschap Landbouw en Zeevisserij van de Vlaamse overheid

- Strategische Adviesraad voor Landbouw en Visserij (SALV)
- Werkgroepen Oogstramingen
- Werkgroepen Gewasbescherming Kleine Teelten
- Sectorgroepen Integrated Pest Management (IPM)
- Raad van het Vlaams Fonds voor Landbouw en Visserij

Research

- Vlaams Centrum voor Bewaring van Tuinbouwproducten (VCBT)
- Optiflux
- Agentschap Innoveren & ondernemen

Quality systems

- Agraya – GLOBALG.A.P.
- Qualität und Sicherheit (QS)
- Vegaplan

Agri-food chain

- Assemblée des Régions Européennes Fruitières, Légumières et Horticoles (AREFLH)
- Comeos
- Overlegplatform voor de Verwerking van en handel in Plantaardige Grondstoffen en producten (OVPG)

Further in Belgium

- Nationale Raad voor de Coöperatie (NRC)
- GS1 Belgilux
- Vlaams infocentrum land- en tuinbouw (Vilt)

International

- Copa-Cogeca – Working Group Fruit & Vegetables
- Freshfel Europe
- Minor Uses Coordination Facility
- World Apple and Pear Association (WAPA)

2025 in numbers

In 2025, our producers achieved a large harvest of both vegetables and fruit. Despite the higher volumes, the total turnover of VBT members decreased by 2.45% compared to the record year 2024. Total turnover amounted to €1.377 billion across the fresh market and the frozen segment.

However, turnover does not equal profit. Rising production costs and increasingly stringent production requirements continue to put pressure on producers. VBT remains fully committed to actively defending the interests of our sector.

Strawberry

	million KG	million €	
2021	50	194	3.88
2022	49	175	3.58
2023	45	181	4.03
2024	48	225	4.68
2025	52	238	4.60

Cauliflower

	million #	million €	
2021	8	6	0.71
2022	7	7	0.93
2023	7	8	1.18
2024	7	8	1.16
2025	7	6	0.79

Zucchini

	million #	million €	
2021	33	8	0.24
2022	31	10	0.33
2023	36	9	0.25
2024	34	12	0.37
2025	37	8	0.22

Apple

	million KG	million €	
2021	96	42	0.43
2022	116	35	0.31
2023	85	37	0.44
2024	70	42	0.60
2025	67	35	0.52

Cucumber

	million #	million €	
2021	186	55	0.30
2022	168	75	0.45
2023	226	68	0.30
2024	223	102	0.46
2025	264	103	0.39

Lettuce

	million #	million €	
2021	60	24	0.39
2022	57	25	0.43
2023	51	28	0.55
2024	39	20	0.52
2025	43	17	0.40

Bell pepper

	million KG	million €	
2021	49	58	1.20
2022	52	65	1.25
2023	51	72	1.40
2024	44	63	1.41
2025	50	52	1.03

Mushroom

	million KG	million €	
2021	7	17	2.31
2022	7	16	2.33
2023	6	16	2.56
2024	7	18	2.73
2025	6	18	2.78

Pear

	million KG	million €	
2021	213	120	0.56
2022	186	113	0.61
2023	153	116	0.76
2024	160	135	0.84
2025	143	115	0.81

Tomato

	million KG	million €	
2021	225	196	0.87
2022	214	202	0.94
2023	214	198	0.92
2024	210	194	0.92
2025	208	198	0.96

Leek

	million KG	million €	
2021	52	44	0.85
2022	49	22	0.45
2023	48	40	0.85
2024	43	35	0.81
2025	45	29	0.65

Chicory

	million KG	million €	
2021	38	47	1.23
2022	38	42	1.12
2023	34	57	1.71
2024	31	65	2.11
2025	34	40	1.16

Legend KG Volume in million kg · # Volume in million pieces · € Turnover in million euros · Mid-price in euros per unit

Apple

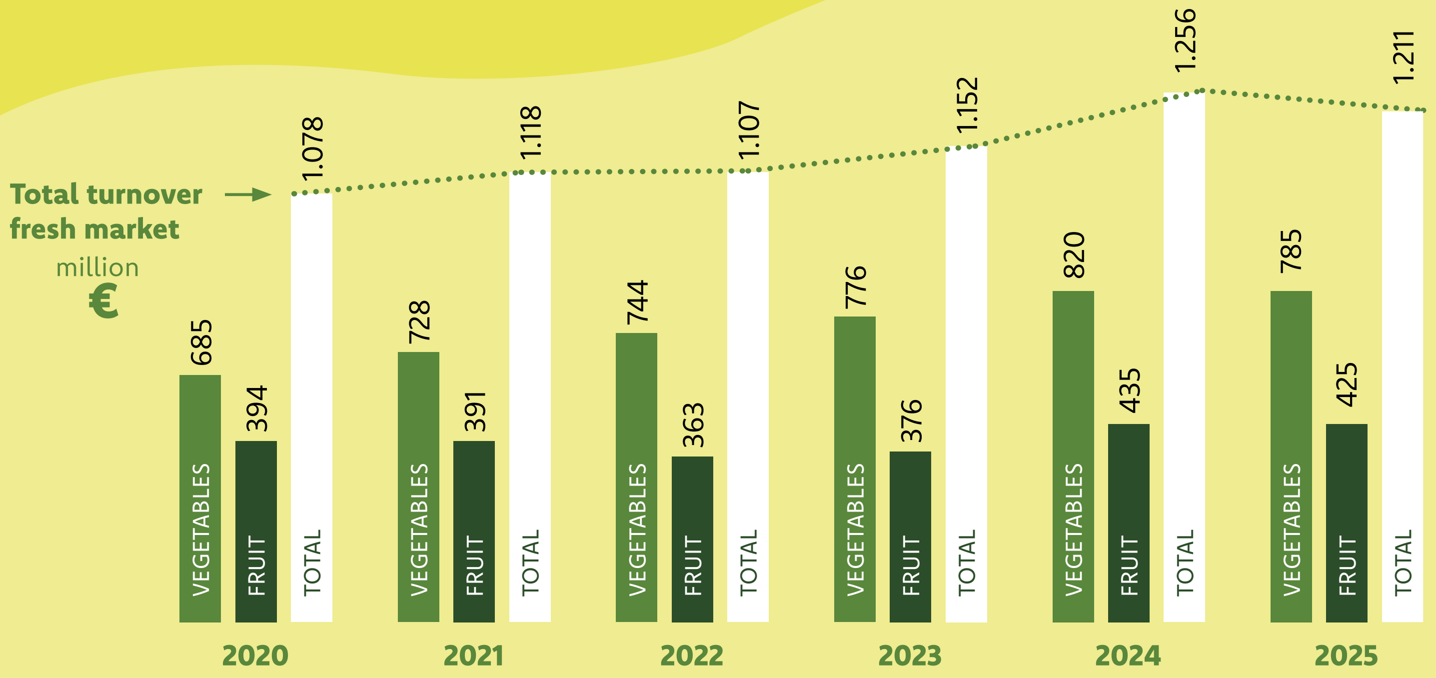
	million KG	million €
’19 -’20	147	53
’20 -’21	79	44
’21 -’22	105	37
’22 -’23	108	34
’23 -’24	82	43
’24 -’25	57	38

Pear

	million KG	million €
’19 -’20	188	108
’20 -’21	215	102
’21 -’22	183	127
’22 -’23	166	102
’23 -’24	174	142
’24 -’25	131	116

Total product sales by cooperative

		million €	
BELORTA	FRUIT	229	**605**
	VEGETABLES	376	
HOOGSTRATEN	FRUIT	164	**375**
	VEGETABLES	211	
REO	FRUIT	32	**231**
	VEGETABLES	198	
INGRO	VEGETABLES	165	**165**



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