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<td>European Technology Platform ‘Food for Life’</td>
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<td>Diet, Nutrition and Health</td>
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<td>CIAA Board of Directors</td>
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<td>41</td>
<td>CIAA Secretariat</td>
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<td>CIAA Members</td>
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CIAA, the Confederation of the Food and Drink Industries of the EU, is the voice of the European food and drink industry - the leading industrial sector and major EU employer and exporter.

CIAA’s role is to represent the food and drink industries’ interests, at the level of both European and international institutions.

CIAA’s mission is to help pro-actively develop an environment (enlarged EU and global markets) in which all European food and drink companies, whatever their size, can compete effectively for sustainable growth, meeting the needs of consumers and playing their part in delivering the targets set by the Lisbon declaration of the European Council - that is, to become the most competitive economy in the world by 2010. CIAA thus contributes to the development of a legislative and economic framework addressing issues of competitiveness, food quality and safety, consumer information and respect for the environment.

Membership of CIAA is made up of:
- 24 national federations, including 2 observers;
- 32 EU sector associations;
- 21 major food and drink companies grouped together in a Liaison Committee.

CIAA’s permanent secretariat, based in Brussels, maintains close contacts with European and international institutions and has become a major partner in consultations on food-related developments. It coordinates the work of more than 700 experts, grouped in Committees and Expert Groups around the following three themes:

- Trade and Competitiveness
- Food and Consumer Policy
- Environment

Through these Committees and Expert Groups, manufacturers from all EU countries provide broad and in-depth expertise. They contribute to establishing CIAA positions on key issues which, once approved, are communicated to European and international decision makers.

CIAA has become a trusted partner of European and international institutions as a result of its longstanding work, in particular on horizontal food issues such as food quality and safety, nutrition and health, novel foods, labelling, the Common Agricultural Policy, international trade issues, sustainable development, respect for the environment and enlargement.

CIAA fulfills its role as a leader in the representation of EU food and drink manufacturers by:
- helping the food and drink industry to maintain consumer confidence;
- establishing close and fruitful cooperation between all links in the food chain;
- ensuring maximum coordination between the various sectoral and geographical groups that make up the EU food and drink industry.
Message from the President

2005 was a challenging year for the European Union, marked by the decision of voters in France and the Netherlands to reject the draft European Constitution, a less than ambitious agreement by the European Council on the 2007-2013 financial perspectives of the EU and, internationally, more disappointment at the slow progress of world trade negotiations at the December ministerial meeting in Hong Kong.

Our industry, like many other industrial sectors, has not been immune from these external developments. Despite this and growing global competition, most food and drink sectors’ growth and production value measures remained positive and stable, underlining the resilience and competitive potential of our industry which topped the European manufacturing league again last year.

Competitiveness and better regulation are, encouragingly, important issues for the European Commission. In the context of the revived Lisbon strategy, CIAA’s Reflection Paper on Food & Drink Industry Competitiveness stressed the urgent need to increase research and development activities, stepping up innovation, developing a simpler and more proportionate EU regulatory framework and ensuring sustainable and competitive supplies of raw materials. In 2006 CIAA will pursue this work on competitiveness, producing for the first time a benchmarking report based on industry-specific international indicators.

The key challenge in 2005 was the European strategy for action on diet, physical activity and health. This challenge will continue to shape CIAA’s work programme in the coming years. CIAA’s Commitments to drive action in the EU Platform underline the industry’s leadership and readiness to implement effective solutions to tackle the multi-factorial problems of overweight and obesity.

While obesity cannot be defeated overnight, the EU Platform is already acting as a catalyst for action, both at company and national level. Food and drink manufacturers are doing their part, voluntarily and responsibly, not just in terms of increased choice and reformulated products, but on all relevant fronts, including advertising, promoting physical activity, consumer education and information, as well as partnerships with public authorities and research.

‘Food for Life’ is in fact the vision and motto of the CIAA-led initiative to create a European Technology Platform, launched last July with the support of the European Commission. The same key theme will be at the centre of CIAA’s next international congress, at the end of October in Brussels.

CIAA’s internal re-shaping continued in 2005, supported by our Board’s decision to strengthen the organisation and to give it a clearer strategic orientation. Our new Director General has quickly made her mark after an intensive round of visits and meetings with members, listening to their views and wishes.

CIAA’s ambition in the year ahead will be to provide even better services to its members, making sure that the voice of Europe’s food and drink industry is heard at all appropriate levels in Brussels.

Jean Martin,
President
Introduction by the Director General

2005 has been a year of transition and change at CIAA. The organisation that is emerging from this process is stronger operationally with a largely renewed team in the Secretariat, better profiled vis-à-vis the EU institutions as well as being more focused on a set of strategic business priorities with clear policy objectives.

In 2005 the EU Platform for action on diet, physical activity and health was the focal point of this approach. CIAA also spearheaded the industry-led, multi-stakeholder European Technology Platform ‘Food for Life,’ an outstanding achievement that will help to shape the long-term research and investment agenda for the whole industry, including small and medium-sized companies.

Throughout the year we sought to raise the visibility of industry-wide positions through more professional management of communication and direct, high-level contacts with members of the Commission, MEPs and EU Presidency representatives. No less than fifty-one per week - such occasions involved our President and/or chairmen and leading members of CIAA’s policy committees.

2005 was a year of transition and change... CIAA is more focused on strategic business priorities, better profiled and stronger organisationally...
### January

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<thead>
<tr>
<th>Date</th>
<th>Country</th>
<th>Event</th>
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<tbody>
<tr>
<td>1</td>
<td>EU</td>
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### February

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<tr>
<th>Date</th>
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<tr>
<td>1-2</td>
<td>CIAA Brussels. A delegation from GMA meets with CIAA</td>
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<td>24</td>
<td>CIAA Brussels. Board meeting</td>
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### March

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<th>Date</th>
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<tbody>
<tr>
<td>15</td>
<td>EU Brussels. Launch of the European Platform for action on Diet, Physical Activity and Health by Commissioner Kyprianou</td>
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### April

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<th>Date</th>
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<tr>
<td>11</td>
<td>EU Brussels. Jean Martin, President of CIAA, meets with Commissioner Kyprianou</td>
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### June

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<th>Date</th>
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<tr>
<td>6</td>
<td>CIAA Brussels. CIAA publishes its Vision Document on the European Technology Platform “Food for Life”</td>
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<td>16</td>
<td>CIAA Brussels. Board meeting</td>
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<tr>
<td>30</td>
<td>EU Brussels. Jean Martin, President of CIAA, meets with Commissioners Mandelson and Potočnik to discuss the CIAA reflection paper on competitiveness and the upcoming launch of the European Technology Platform</td>
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### July

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<tr>
<td>1</td>
<td>EU United Kingdom Presidency of the EU</td>
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<td>5</td>
<td>EU Brussels. Launch of the European Technology Platform “Food for Life” under the auspices of CIAA</td>
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### September

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<th>Date</th>
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<tr>
<td>8</td>
<td>EU Brussels. Jean Martin, President of CIAA, meets with Commissioner Fischer Boel to discuss the ongoing WTO negotiations</td>
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<tr>
<td>9</td>
<td>CIAA CIAA launches its new website</td>
</tr>
<tr>
<td>14-16</td>
<td>USA Visit of President and Director General of CIAA to Washington - meetings with representatives of various departments of US government, the US Food and Drug Administration, the Groceries Manufacturers of America, the Food Products Association and the European Commission Delegation. The issues discussed focused around: WTO, CAP, regulatory cooperation between the US and the EU, trade disputes, GMOs, Diet &amp; Nutrition</td>
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<tr>
<td>22-23</td>
<td>UK Edinburgh. CIAA takes part in the UK Presidency Conference on Better European Regulation, entitled “Competitiveness &amp; Consultation – Business at the Heart of Europe”</td>
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</tbody>
</table>
### Calendar 2006

#### October
- **12-13** | EU | London. International meeting of Food and Drink Industry Associations
- **20** | CIAA | Brussels. Board meeting and adoption of the ‘Principles of Food and Beverage Product Marketing Communications’

#### November
- **24** | CIAA | Brussels. CIAA issues its collective commitments within the framework of the EU Platform for Action on Diet, Physical Activity and Health, designed to address the multiple causes of obesity
- **29** | EU | Brussels. CIAA holds its annual European Parliament evening. The event is hosted by Ms Frédérique Ries MEP

#### December
- **8** | EU | Brussels. Adoption by European Commission of the Green Paper: “Promoting healthy diets and physical activity: a European dimension for the prevention of overweight, obesity and chronic diseases”
- **13-18** | WTO | A delegation from CIAA participates in the 6th WTO Ministerial Conference in Hong Kong

#### January
- **1** | EU | Austrian Presidency of the EU
- **16-19** | EP | Strasbourg. Plenary session

#### February
- **1-2** | EP | Strasbourg. Plenary session
- **13-16** | EP | Strasbourg. Plenary session

#### March
- **7** | CIAA | Brussels. Board meeting
- **13-16** | EP | Strasbourg. Plenary session
- **22-23** | EP | Strasbourg. Plenary session
- **23-24** | EU | Brussels. European Council

#### April
- **3-6** | EP | Strasbourg. Plenary session
- **26-27** | EP | Strasbourg. Plenary session
- **30** | WTO | Draft modalities for Agriculture and NAMA to be finalised by WTO members

#### May
- **11-12** | EU/USA | Brussels. Joint EU-US conference on Diet, Physical Activity and Health
- **15-18** | EP | Strasbourg. Plenary session
- **31** | EP | Brussels. Plenary session

#### June
- **1** | EP | Brussels. Plenary session
- **12-15** | EP | Strasbourg. Plenary session
- **15-16** | EU | Brussels. European Council
- **28** | CIAA | Brussels. Board Meeting

#### July
- **1** | EU | Finnish Presidency of the EU
- **3-6** | EP | Strasbourg. Plenary session
- **30** | WTO | Draft Schedules need to be elaborated based on modalities

#### September
- **4-7** | EP | Strasbourg. Plenary session
- **25-28** | EP | Strasbourg. Plenary session

#### October
- **11-12** | EP | Brussels. Plenary session
- **19-20** | EU | Brussels. European Council
- **23-26** | EP | Strasbourg. Plenary session
- **25** | CIAA | Paris. Board Meeting
- **26-27** | CIAA | Brussels. CIAA Congress

#### November
- **13-16** | EP | Strasbourg. Plenary session
- **17** | WHO/EU | Istanbul. WHO and European Commission co-host Ministerial Conference on Counteracting Obesity
- **29-30** | EP | Brussels. Plenary session
- **28** | EP | CIAA Annual European Parliament evening

#### December
- **11-14** | EP | Strasbourg. Plenary session
- **14-15** | EU | Brussels. European Council
The F&D Industry: a pillar of the EU economy

Structure of the food and drink industry - Key figures

**An industry still characterised by modest growth**

- The food and drink industry is the largest manufacturing sector in the EU-25, accounting for 14% of total turnover. It ranks first, ahead of the automobile and chemical industries.

- In 2004, food and drink industry turnover reached €815 billion. It registered a modest 2% rise in annual turnover compared to the previous year.

- The food and drink industry is the leading employer in the European manufacturing sector, employing 4 million people.

- 99% of European food and drink companies are small and medium sized enterprises. Totalling 279,000, these SMEs employ 61% of all food and drink industry workers and account for 49% of the sector’s turnover.

- France, Germany, Italy, the UK and Spain are the leading producers of food and drink products in the EU, accounting for more than 70% of total EU turnover.

- The “various food products” sector is the largest one, representing 25% of total turnover and 42% of the workforce. The meat sector, beverages and dairy products are also key branches of the industry.

### Key Figures for the F&D industry, 2001-2004

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004/2003</th>
<th>2004</th>
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<tr>
<td><strong>Turnover</strong></td>
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<td>791</td>
<td>799</td>
<td>815</td>
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<tr>
<td><strong>Employees</strong></td>
<td>million</td>
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<td>4.2</td>
<td>4.1</td>
<td>3.9</td>
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<tr>
<td><strong>Companies</strong></td>
<td>thousand</td>
<td>282</td>
<td>n.a.</td>
<td>n.a.</td>
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* Source: Eurostat and CIAA calculation
* In current prices

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1. The so-called “various food products” category is a heterogeneous group which includes bakery, pastry, chocolate and confectionery products but also pasta and baby food.
This map presents the latest data supplied by national federations. (*) Data 2003/2002 (**) Production (n.a.) Not available
The European market share of the global export market in food and drink products has been shrinking over the last ten years, much to the benefit of agricultural exporters like Australia, New Zealand, China and Brazil.

A shrinking share of global exports

The European market share of the global export market in food and drink products has been shrinking over the last ten years, much to the benefit of agricultural exporters like Australia, New Zealand, China and Brazil.

International comparisons

Slow growth of total production value

Over the last ten years, the production value of the European food and drink industry has grown at the same pace as that of the US, but clearly at a lower rate than many of its competitors. The steep growth of Brazilian food and drink production is remarkable.

Evolution of the production value of food and drink products in various countries (index 1995 = 100)

Source: WorldBank WITS
Markets and consumption

Key figures

Extra-EU trade

- In 2004, the EU-25 exported €45 billion worth of food and drink products to third countries, while importing €41 billion worth.
- The EU is a net exporter of foodstuffs with a positive trade balance of more than €4 billion. This trade surplus registered a 24% decrease in 2004 due to the rise in imports.
- Beverages and “various food products” sectors account for 55% of European food and drink exports.

Intra-EU trade

- In 2004, exports between the EU-25 reached €139 billion. This amount highlights the importance of the EU internal market.
- Intra-EU exports in 2004 accounted for 17% of turnover. At the same time, exports to third countries represented 6% of turnover.

Consumption on the internal market

- In 2003, about 13% of total household consumption expenditure in the EU-25 was spent on food and non-alcoholic beverages. Since 1995, this percentage has registered a 10% decrease.

<table>
<thead>
<tr>
<th>Destinations of EU F&amp;D products (€ billion)</th>
<th>China</th>
<th>USA</th>
<th>Switzerland</th>
<th>Canada</th>
<th>Norway</th>
<th>Australia</th>
<th>South Korea</th>
<th>Algeria</th>
<th>Croatia</th>
<th>Rest of the world</th>
<th>Total extra-EU</th>
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<table>
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<tr>
<th>Origin of EU F&amp;D imports (€ billion)</th>
<th>Brazil</th>
<th>Argentina</th>
<th>USA</th>
<th>China</th>
<th>Switzerland</th>
<th>New Zealand</th>
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<td><strong>1.2</strong></td>
<td><strong>20.0</strong></td>
<td><strong>40.7</strong></td>
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Key EU-25 trading partners, 2004

Key trade trends from January to September 2005 (9 months)

- Following a slight drop in 2003, exports of food and drink products rose again in 2004 and continued to grow in 2005 (based on 9 months). The growth rate of exports (4.8%) was higher than that of imports (3.2%). The trade surplus, which decreased substantially in 2003 and 2004, registered a 23% increase in 2005.

EU-25 trade figures (€ billion)

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<tr>
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<th>2001</th>
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<td>5.2</td>
<td>4.5</td>
<td>2.8</td>
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</table>

Source: Eurostat
Five years after the launch of the Lisbon strategy, achievements by the start of 2005 were, generally speaking, modest. The Commission therefore began the mid-term assessment with the presentation of a communication entitled “Working together for growth and employment - a new start for the Lisbon strategy.” Following the Commission’s proposal, the European Council relaunched the Lisbon strategy in March 2005 by concentrating priorities on growth and employment and handing out specific tasks. In response, the Member States presented a series of national reform programmes in the autumn. The Commission has already drawn up and partially implemented a Lisbon Community programme and it published an annual assessment report at the beginning of 2006.

Work on the competitiveness of the food & drink industry, which began in 2004, was brought to a conclusion at the beginning of 2005. This first discussion document by CIAA on the competitiveness of the industry highlighted certain problems specific to the sector and proposed solutions, including legislative ones. Numerous meetings took place with the aim of highlighting certain negative-impacting factors in relation to competitiveness. The inadequate level of quantitative information for a specialised analysis of the sector has also been emphasised. In response to this observation, DG Enterprise decided to launch an in-depth study of the food & drink industry.

“It is of fundamental importance for the EU to be an attractive location for continued food and drink industry investment.”
CIAA must pursue this first analysis using economic indicators, which enable it to assess the state of health of the food & drink industry and evaluate its capacity to react to current challenges and improve its competitiveness. However, CIAA’s objectives go beyond assessing the situation and emphasising the problems specific to the sector. It must also put forward solutions for practical and sustainable improvement.

**Better regulation**

Better regulation is one of the strategies implemented by the Commission to support growth by making the regulatory environment more favourable to businesses. The scale of this strategy increased with the publication in March of a Communication from the Commission on this subject, presenting its general approach. At the same time, the Commission undertook to call into question and even stop a large number of legislative proposals which had been pending with the Council, in some cases for many years. Finally, in October a detailed work programme was put forward for the revision, simplification and recasting of a number of legislative texts including some in the sphere of food and agriculture.

CIAA has identified the regulations which should be revised and improved. The effect of CIAA’s work has been amplified through shared projects within the Alliance for a Competitive European Industry (see box). The President of CIAA was invited to take part in the better regulation conference organised by the British Presidency in Edinburgh. CIAA has also agreed to comment, in the light of its priorities, on the Commission’s work programme for the simplification and improvement of legislation.

Fully developing the food & drink industry’s potential for growth requires action at several levels. This objective also requires a regulatory framework which is clear, effective, avoids unnecessary complications and establishes administrative procedures that are more rapid and less costly. It is also important that this framework does not put a brake on innovation in Europe.

**Impact assessment: a new tool for improving new laws**

An impact assessment is a document which accompanies all large-scale draft legal texts in order to provide the legislator with an in-depth assessment of the legislative or other options which may be envisaged and their practical consequences. The Commission’s approach was drawn up in 2002 and underwent certain improvements in 2004.

In June 2005, the Commission published its guidelines for impact assessment with a greater focus on concerns linked to competitiveness. This Commission document, which is for internal use, provides the Directorates General with precise guidance on methodology. Various Directorates General have also implemented specific methodologies or working approaches, which incorporate stakeholder consultations and impact analyses in internal decision-making procedures.

**Alliance for a Competitive European Industry**

Since the end of 2004 the Alliance for a Competitive European Industry has been made up of twelve European federations from the following industrial sectors: automobiles (ACEA), chemicals (Cefic), cement (CEMBureau), paper (CEPI), food & drink industry (CIAA), textiles (Euratex), electricity (Eurelectric), iron and steel (Eurofer), metals (Eurometaux), oil (EUROPIA), electronic and mechanical engineering (ORGALIME), and employers (UNICE). These federations represent 6,000 large businesses, 1.7 million small and medium-sized businesses, a total turnover of approximately €5,000 billion and 23 million jobs in Europe. The aim of the Alliance is to promote the competitiveness of industry, contribute to the implementation of the Lisbon Agenda and express the opinion of the business community on certain regulatory projects.

After working within the Alliance for a Competitive European Industry to prepare a position on impact assessment, CIAA helped air the industry’s demands on the subject. At the end of March, the Alliance held a seminar to explore the numerous issues raised by this new practice within the various institutions. CIAA increased its contacts with the various Directorates General and the resulting discussions provided an opportunity to point out concerns about the nature and length of consultation, the determination of options for consideration and precise expectations with regard to the business community. In October, CIAA also took part in a conference organised by DG SANCO aimed at discussing precisely those challenges created by the new procedures and the expectations of the parties involved.

Impact assessment is an essential part of the Commission’s strategy for improving legislation but also represents a considerable challenge for the food & drink industry. The industry is involved in the consultations and can certainly contribute technical expertise, but it is also being consulted about quantifying the impact of a potential measure on industrial activity. Whilst it is easy to understand the importance of its action in terms of credibility, the food & drink industry has to overcome difficulties to obtain reliable and representative estimates for options which may even be a long way from current practices.
Slow progress in the WTO process

WTO negotiations made little progress following the July 2004 deal, despite a trade ministers’ agreement in Davos, in January 2005, and later in Kenya, to move forward with parallel negotiations in all sectors. Negotiators focused mostly on agriculture and the technical conversion of specific tariffs into ad valorem equivalents. This took several months and was finally resolved in May. Hence, the deadline to find an agreement on draft modalities by July 2005 passed without sufficient progress being made on the various elements of the agriculture negotiation.

In July, WTO Director General Supachai Panitchpakdi evaluated the situation as “disappointing but not disastrous.” Intensive negotiations resumed in September and that same month Pascal Lamy took office as new Director General of the WTO. New offers gave fresh impetus to the process, including the EU offer tabled in October, declared conditional upon other partners’ offers. The intense negotiation process did not allow for the bridging of major differences and led to the downscaling of ambitions for the 6th Ministerial Conference of 13-18 December in Hong Kong. On a positive note, despite the lack of overall substantive progress in many areas, agreement was ultimately reached on an aid package. Agreements in other areas such as tariff and quota free access to LDCs, and on export competition made only minor progress.

"Trade policy will require more targeted action to improve access to third country markets for EU food and drink exports."
CIAA representatives continued promoting the European food and drink industries' interests in meetings with high level officials of involved Directorates for Trade, Agriculture and Enterprise and also with their respective Commissioners. A CIAA delegation met on several occasions with Geneva based agricultural experts from the EU, the US, India and Brazil and with the Chair of the agriculture negotiation. The lobbying activity focused not only on agriculture, but also on trade facilitation. In these contacts, CIAA stressed the industry commitment for a successful round and the need for reaching a balanced agriculture agreement. The objectives of the food and drink industry were also further promoted in contacts with Members of the European Parliament. CIAA provided technical input to the work carried out by Commission services on the conversion of specific tariffs into ad valorem equivalents to ensure that the situation of processed products was adequately addressed.

A CIAA delegation, headed by President Jean Martin, participated in the 6th WTO Ministerial Conference in Hong Kong from 13-18 December. Such presence allowed coordination with other industry representatives, close monitoring of developments, and immediate reaction to new developments.

Trade relations with Russia

Many problems persisted in 2005 especially in relation to the opening up of the Russian market to European imports. Unfortunately, solving these issues, namely the slowness and opaqueness of procedures to certify production facilities, continued to hinder those European businesses wishing to export to Russia. It particularly affected businesses from the new EU States. Another problem arose on 1 January 2005 with the entry into force of the new EU-Russia veterinary agreement. This caused enormous problems for Community exporters. The new agreement required the production of certificates and pre-certificates for exports to accompany exported products. It also introduced requirements with regard to disease control, and the problems were only partly resolved during February. This experience prompted DG Trade to launch an extended debate on problems linked to sanitary and phytosanitary regulations.

Achievements

Much work remains to be done within a very limited time span to complete the whole Doha Round by the end of 2006. It will be essential to ensure an overall balance and coherence within the agriculture agreement. The agreed end-date for export competition measures being subject to confirmation, all disciplines applicable to export credits, food aid and “single desk sellers” will have to be elaborated. The phasing out of export refunds needs to follow internal reform steps and market access commitments. If industry has no access to competitive raw materials, the situation will become critical for the competitiveness of EU exporters, and it will be imperative to look at alternatives to export refunds.

Challenges

CIAA has gathered much information citing the practical problems encountered by operators with regard to the approval of company certificates and the delivery of veterinary certificates. CIAA arranged numerous technical and policy meetings which enabled it to make this information known at all levels within the various Directorates General concerned, and to some members of the European Commission whose intervention has helped clarify the situation and made it possible to find practical solutions. In May 2005, CIAA also took part in a discussion seminar organised by DG Trade on the numerous problems relating to sanitary and phytosanitary issues encountered by exporters, and the options that would allow these obstacles to trade to be dealt with more effectively.

Background

In 2004, Russia was the third largest destination for Community exports of food & drink industry products. This represented an export value of over €3 billion and the trend for 2005 remained upward. Russia is an important market, particularly for the new Member States who wish to maintain and even increase their presence in this growing market. However, a more general challenge exists since, in the absence of bilateral sanitary and phyto-sanitary agreements, these issues fall within the competence of the Member States. The example of Russia shows that national approaches, which are often competitive, do not help to solve the problem of obstacles to trade in a manner which is effective and satisfactory for all operators.
Two important points in the Communication have raised concerns in industry: the Commission has proposed on the one hand replacing current methods of determining origin with a single rule based on added value, and on the other, making operators more responsible for determining the origin of merchandise.

It would be difficult to calculate the added value in the beneficiary country based on net production costs, especially for reasons of confidentiality and the exact definition of the concept. In addition, this approach would lead to an increase in administrative costs for operators and an increased risk of fraud for both imports and exports. Finally, transferring responsibility from the authorities to the economic operators would render the operators even more vulnerable.

Achievements

DG Taxud has proposed an initial application of this approach in the context of the generalised system of preferences. Within the Commission, considerable differences of opinion remain on this matter. A firm of consultants is preparing an impact-study for the proposed new approach. The economic repercussions of this new concept, were it to be adopted, continue to preoccupy many sectors of the food & drink industry. CIAA is keeping a close watch on this issue in order to make sure that the food & drink industry benefits from treatment compatible with the realities of its commercial operations.

Challenges

In March 2005, the Commission presented a Communication proposing a new approach to determining rules of origin in preferential agreements with third countries. This Communication followed the Green Paper of December 2003 which initiated wide-ranging consultations on the difficulties connected with current rules and the different options available for remedying the situation.

The declared objective of the Commission is to simplify the rules of origin principle, meaning, where possible, relaxing these rules in order to encourage greater integration of developing countries in world trade. However, for sensitive sectors, including agricultural products, textiles or fishing, an impact study has been planned in order to assess whether or not the proposed approach is applicable.
Transport: Customs and Security modernisation

Two proposals, adopted by the Commission in November 2005, are aimed at modernising customs - an area where European businesses and national administrations are continuing to evolve. The aim of modernising the customs code is to simplify customs procedures, thereby facilitating trade whilst ensuring more effective customs controls.

In addition, a draft decision should create the conditions for a paper-free electronic work environment, with more efficient exchanges of information.

In tandem with this process, in April 2005 and following the codecision procedure, the European Parliament and the Council approved a regulation aimed at stepping up security management at the EU’s external borders.

The Commission and experts from the Member States are now examining implementation provisions, particularly those connected with risk management and declarations prior to import and export.

For CIAA, the modernisation of the Customs Code should lead, in particular, to a thorough simplification of access to and management of the inward processing regime (IPR) at both national and Community level.

The economic importance of IPR will increase in the years to come, particularly as a result of the progressive abolition of refunds. The rules on equivalence, difficulties linked to the authorisation procedures and the deadlines allocated to the various stages of the procedure make IPR particularly difficult to use for several sectors of industry.

Customs code amendments on the provisions of application have also led the industry to recall its priorities on this subject. These include: facilitating legitimate trade, keeping simplified customs procedures in place and the importance of establishing an electronic environment as quickly as possible.

The updated provisions relating to IPR should satisfy the current needs of businesses so that they can become competitive in markets in third countries.

While the codecision process is starting, this fundamental revision of Community customs legislation must allow the food & drink industry to obtain substantial improvements. The implementation of this new legislation is not expected before 2009.

EURO-Mediterranean Free Trade Area

10 years after the launch of the Barcelona process, the European Commission in 2005 reviewed trade relations with EUROMED countries. The objective is to create a Euro-Mediterranean Free Trade Area (EMFTA) by the year 2010 and to promote intra-regional development. The bilateral agreements with Tunisia, Israel, Morocco, Jordan, Egypt, Algeria, Lebanon, Syria, Libya and the Palestinian Authority, foresee a high degree of trade liberalisation in agricultural and processed products. The success of the Euromed project will depend much on significant progress being made in South-South relations and issues of non-tariff barriers such as product approvals, certification, sanitary issues, labelling and customs procedures.
Geographical indications
and Denomination of origin

The EU instruments of Protected Denomination of Origin (PDO) and Protected Geographical Indication (PGI) protect a product’s name and are based on specific quality standards and methods of production. Currently, almost 700 PDOs and PGIs have been registered in the EU. More than 200 cases are still awaiting registration. There has been a rapid increase in the number of registered names and insufficient assurances concerning the specific requirements and characteristics of such products. In December 2005, the Commission approved a new proposal aimed at amending current PDO and PGI Regulations, in order to comply with the WTO panel result and with the aim of introducing some other necessary changes.

Background

CIAA has actively participated in the consultation launched by DG Agriculture. It has highlighted, in particular, key concerns that call for thorough consideration. These include:

■ the need for defining clear and harmonised rules on which PDO and PGI systems should be based;
■ the importance of establishing efficient controls at all stages of production, processing and distribution;
■ the risk of discrimination against EU producers, which could follow from the proposed procedures and obligations, aimed at complying with the outcome of the WTO panel.

In the context of the review of Council Regulation 2081/92 on PDOs and PGIs, CIAA identified a number of priorities. CIAA considers the draft Commission proposal a step in the right direction, as it should contribute to the simplification and clarification of registration procedures as well as the reinforcement of controls.

Achievements

“The long-term objective of the EU food and drink industry is to promote a more competitive, more efficient and more sustainable agricultural production in Europe”
Quality of agricultural production

Quality is a very broad concept and has different meanings throughout the food chain. Although the number of quality assurance plans is growing, in response to a request from the EP, DG Agriculture has launched a study aimed at identifying current quality management systems and assessing the costs and benefits for actors in the food chain. In 2006 this study will lead to an assessment of the need for Community legislation on the subject.

From a general point of view, CIAA recalled the vital importance of separating the concept of food safety from that of quality. Food safety is a fundamental and non-competitive principle founded on Community legislation. Once a product respects these standards, it is up to consumers to decide which product to buy depending on their income, habits, etc. Quality is therefore the responsibility of the private sector and should not be subject to compulsory regulatory measures.

Achievements

The food industry has developed numerous voluntary quality plans and is responsible for these plans with regard to consumers. The plans vary enormously and include different criteria and actors. During forthcoming discussions about a Community approach to quality assurance, CIAA will endeavour to remind those concerned that ultimately it is up to consumers to judge the quality of a product.

Towards sustainable agriculture

Since January 2004, CIAA has been actively cooperating with the SAI Platform (Sustainable Agriculture Initiative). Since then, cooperation has focused mainly on information exchanges and know-how. CIAA has also been involved in a series of joint meetings aimed at highlighting initiatives in the food & drink industry especially in the sphere of sustainable agriculture. In 2005, two studies were jointly financed: an assessment of plans aimed at improving existing agricultural production systems in Europe, and an analysis of the conclusions and indicators used in impact studies on sustainable production systems comparable to the recommendations of the SAI Platform.

Membership of the SAI Platform is composed of food & drink industry businesses. Its general aim is to promote the development of sustainable agriculture based on three pillars: economic, social and environmental. Its main activity concerns the development of guidelines, agricultural practices and indicators. To date, recommendations have been formulated for the coffee sector, cereals, milk, vegetables, potatoes and fruit. Recommendations are drafted in consultation with other interested parties.

The involvement of farmers is essential, particularly in pilot projects which allow recommendations to be tested and validated. 2005 saw the launch of several pilot projects in Europe, notably in connection with cereals, milk, potatoes and vegetables.

Rural development and the Common Agricultural Policy

Following the Luxembourg CAP reform agreement of June 2003, and choices about applicable national procedures the following year, rural development was the primary concern in 2005. The new regulatory framework for rural development programmes 2007-2013 was adopted by the Council in September 2005. Improving the competitiveness of the food & drink industry is one of the Community’s priorities. Although strategic Community guidelines will be adopted shortly, Member States are in turn preparing strategic plans as a basis for their own rural development programmes.

For the food & drink industry, the rural development policy should certainly help improve the competitiveness of businesses. Several measures are available to Member States in order to encourage investment, facilitate innovation and access to R&D, and to promote the use of new technologies in small and medium-sized businesses. One of the measures will in particular support cooperation within the food chain for the development of new products. Other measures such as quality improvement concern more specifically the agricultural sector.

Throughout 2005, CIAA encouraged national Federations to take part in ongoing consultations in the Member States aimed at preparing national strategic plans.

Agreement on the financial perspectives 2007-2013, and therefore on financing for rural development policy was finally obtained at the end of 2005 under the British EU Presidency. Even though the funds available are significantly less than those initially proposed by the Commission, this agreement paves the way for the implementation of national programmes from 1 January 2007.
Since 2002, the European Food Safety Authority (EFSA) has provided independent scientific advice on all matters linked to food and feed safety. As set out in Article 61, paragraph 1 of its founding Regulation, before 1 January 2005 and every six years thereafter, the Authority, in collaboration with the Commission, has to commission an independent external evaluation of its achievements on the basis of the terms of reference issued by the Management Board and in agreement with the Commission.

In June, CIAA submitted comments to an independent review of EFSA. Although the majority of comments were positive, a number of questions could not be answered, due to an absence of methods to measure impact. CIAA underlined that EFSA should not set aside industry research findings, as this could ultimately undermine the quality of scientific opinions.

CIAA continues to maintain a close cooperative relationship with EFSA via its involvement in stakeholder fora and scientific hearings.

In October, CIAA attended the first meeting of the EFSA Stakeholder Consultative Platform in Parma. The Platform, which will meet roughly every six months, was established to advise EFSA on general issues relating to its work and, in particular, the impact of its work on stakeholders.

In December, John Wood, chairperson of the CIAA Food and Consumer Policy Committee was nominated as Vice-Chairperson of the EFSA Stakeholder Consultative Platform.

The third annual EFSA Stakeholder Colloque, entitled “Sharing Thoughts with Stakeholders on EFSA’s Plans for Achievements” took place in December.
the Future” took place in early November. Approximately 60 stakeholders, CIAA included, were in attendance.

The discussions focused on three key subjects:
1- EFSA’s role in the area of nutrition;
2- whether industry should be charged fees for evaluations;
3- EFSA’s role in communication and data input.

The Authority acknowledged that it had to improve its working methodology and explain these more fully to stakeholders.

- To contribute more efficiently to the work of the EFSA Stakeholder Consultative Platform, at stakeholder fora and at scientific hearings;
- To seek opportunities to make industry scientific knowledge available to EFSA without undermining its independence.

GMOs

Regulations 1829/2003/EC and 1830/2003/EC on Genetically Modified Organisms (GMOs) entered into force on 19 April 2004. This legislation defines rules for the placing on the market and the labelling of GMOs, in addition to food and feed products derived from GMOs. The legislation also defines GMO traceability rules as well as for other food and feed products derived from GMOs. A report on the implementation of this Regulation was scheduled to be sent to the European Parliament and Council in November 2005.

In May, CIAA submitted its response to a European Commission stakeholders’ questionnaire on the implementation of Regulation 1829/2003 on Genetically Modified Food and Feed. The questionnaire, which sought the experiences of stakeholders in implementing the Regulation and calls for recommendations on how to improve its efficiency, was intended to form the basis for possible amendments to the legislation.

The following items were addressed in CIAA’s response:
- Question of co-existence of different crop production methods;
- Upcoming legislative initiatives related to seed production (including the setting of thresholds).

In late June, CIAA submitted its response to a second Commission Questionnaire, this time on the implementation of Regulation 1830/2003/EC on the traceability and labelling of GMOs. In its response, CIAA observed that the legislation had not facilitated the delivery of the requested information by industry.

CIAA also stressed the importance of streamlining the legislation, facilitating its implementation and ensuring its compatibility with the requirements of the Cartagena protocol.

As long as consumers continue to refuse GMOs for food use, CIAA members will continue to respond to current customer demands for conventional products in compliance with EU law.

There is the need to establish clear rules on co-existence to guarantee the continued availability of identity-preserved non-GM material, as without these, the cultivation of GM food crops would pose further challenges.

Food Safety Platform

In October, CIAA published the terms of reference of the Food Safety Platform. Core members of the platform are the representative European sector organisations of the 6 main partners in the food chain.

Farmers/Cooperatives: Copa Cogeca
Agri-food Trade: Celca
Feed Producers: FEFAC
Food Producers: CIAA
Retail/Wholesale/ Import/Export: EuroCommerce
Consumers: BEUC

Under the terms of reference, the most important subjects to be put for discussion will be the implementation of the General Food Law Principles, issues of traceability, crisis management including the Rapid Alert System, product recall and communication.

The tasks of the platform include:
- Building confidence between the partners by facilitating open and transparent discussion on all aspects of the food chain relating to food safety;
- Allowing for a fast and reliable flow of information between the participants;
- Acting as a platform for members to identify, discuss and share emerging issues related to food safety;
- Being a contact point (representing the European food chain organisations), for the European Commission and EFSA, without undermining the right of each individual organisation to be directly informed and consulted;
- In crisis situations, the Platform acting as a reliable source of information for its members, helping to ensure that relevant information related to a crisis is rapidly disseminated and discussed between the food chain organisations, the European Commission and EFSA.
The EU’s legislative “Hygiene Package,” adopted in April 2004 by the European Parliament and Council, aims to merge and harmonise very detailed and complex hygiene requirements which had previously been scattered over seventeen Directives. The legislation entered into force on 1 January 2006. To facilitate the application of the revised rules, implementing measures and transitional arrangements were adopted on 5 December 2005. These also entered into force on 1 January 2006.

**The Hygiene Package aims to:**
- Implement a “farm to table” approach;
- Introduce a “Hazard Analysis and Critical Control Points” system (HACCP) for all food business operators, to help identify steps in their activities, which are critical for ensuring food safety. HACCP also ensures that adequate safety procedures are identified, implemented, maintained and reviewed;
- Register or approve certain food establishments;
- Develop guides to good practice for hygiene (GPHs) and for the application of HACCP principles by food business operators;
- Establish provisions to allow flexibility for food produced in remote areas (high mountains, remote islands) and for traditional production methods.

**Background**

In the light of these developments in the area of EU hygiene legislation, CIAA decided to re-launch its Expert Group on Hygiene on 18 October 2005.

Although the main objective of the re-launched Hygiene Group is to ensure that the implementation of the hygiene regime is in fact workable, it will also serve as a platform for the discussion of other hygiene-related issues, such as feed hygiene and the WTO salmonella criteria for minced meat.

Prior to the establishment of the Expert Group, CIAA had participated in Commission stakeholder consultations on the hygiene package, and submitted a number of comments on the legislative package in its draft form, some of which have subsequently been reflected in the adopted texts.

The package remains nonetheless complex, consisting of five key pieces of legislation accompanied by four implementing Regulations and four non-legislative “Guidance Documents”. In order to allow a certain degree of flexibility, the responsibility for adapting the rules to local situations rests with the Competent Authorities, however this can also lead to trade distortion as certain Member States will choose to interpret the legislation in a more stringent manner than others.

### Acrylamide

Early in 2002, the Swedish National Food Authority and the University of Stockholm jointly announced that they had found significant levels of acrylamide in starch-based foods that had formed as a result of heating at high temperatures. According to international risk assessments (IARC 1994), acrylamide is a “probable human carcinogen” (class 2A). The Swedish findings were rapidly confirmed by several other governments and subsequently, all available data on acrylamide was reviewed at international level by the World Health Organization (WHO), the Food and Agricultural Organization (FAO) of the United Nations (UN), the European Commission’s Scientific Committee on Food (SCF), and finally, in February 2005 by the FAO/WHO Joint Committee on Food Additives (JECFA).

At a Commission Expert Group meeting in January 2005, CIAA presented a “toolbox” concept that identifies approaches that can help minimise acrylamide formation. Different compartments of this Toolbox would be, for example, natural properties of the ingredients, product composition, process conditions, or finished product characteristics. The Toolbox was published in summer 2005 and is available for download via the CIAA website.

The European Commission has also established a direct link to the CIAA acrylamide toolbox from its own official website. CIAA’s Acrylamide Expert Group agreed on a process that allows for the Toolbox concept to be continuously updated in the near future. The purpose of this will be that it will contribute to finding other tools aimed at lowering acrylamide levels in food.

Based on the CIAA toolbox concept and the CIAA acrylamide Status report of 2004, CIAA subsequently sent comments to the UK Food Standards Agency on the Draft Codex Discussion Paper on acrylamide.
The European Commission is considering the development of guidance on acrylamide. As a result, the acrylamide Expert Group has agreed that further updating of the CIAA Toolbox could make a useful contribution to any guidance paper since the fundamental idea underpinning the Toolbox is that it should provide useful indications, based upon research findings, to the food processing sector and beyond, without turning into a prescriptive manual. CIAA considers the Toolbox to be a necessary mechanism for sharing the efforts of food industry to mitigate acrylamide.

CIAA experts are seeking collaboration with national governments to feed into the development of codes of practice to mitigate acrylamide.

Under the auspices of the European Commission, a scientific workshop was organised for March 2006. The workshop sought to share scientific findings, communicated and discussed further mitigation strategies with regulators, scientists and industry both from Europe and further afield.

Food Ingredients

The European framework legislation on additives and flavourings is currently being thoroughly revised. Within this context, the Commission has developed a package of proposals on “food improvement agents.”

These proposals are:
- a Regulation on food additives, amending and replacing the Additives Framework Directive 89/107/EEC;
- a new Regulation on food enzymes, setting general requirements and establishing a Community list of food enzymes;
- a Regulation on flavourings and food ingredients with flavouring properties, aiming to bring herbs and spices under the scope of the Regulation and replacing the Flavourings Framework Directive 88/388/EEC;
- a proposal centralising the authorisation procedures for additives, enzymes and flavourings.

The package of proposals should be adopted by the Commission in the first quarter of 2006, and then be sent to the European Parliament and the Council in accordance with the co-decision procedure.

In particular, CIAA welcomes the fact that the definition of processing aids is kept unchanged from Directive 89/107/EEC (given the numerous interpretation and application problems that the newly proposed definition would have encountered). CIAA welcomes the fact that in the final proposals, food additives and enzymes will be subject to an on-going review according to actual use and possible new uses, and not following an arbitrary 10-year authorisation renewal clause.

On flavourings, CIAA welcomes both the clarifications made to the scope of the proposed flavourings Regulation and the changes that have been made to the control of active principles. Many of the comments made by CIAA have been included in the current text.

REACH

On 17 November 2005 the European Parliament adopted its first reading of the Sacconi report on REACH. The vote was on the whole positive for the food and drink industry. The EP adopted two approaches supporting both amendments which aim to exclude food as defined by Regulation 178/2002 from the scope of the regulation and also other amendments which would exclude food from the registration provisions. The Council political agreement on the text which was reached on 13 December also takes up the industry position, excluding food and feed as defined by Regulation 178/2002 from the registration provisions.

As far as the draft proposals on additives and enzymes are concerned, CIAA is pleased to take note of various positive aspects for the F&D industry. For example, the co-decision procedure will be replaced by the comitology procedure as regards conditions of use; and the safety assessment of additives and enzymes will be carried out by EFSA under a centralised procedure. CIAA is very much in favour of harmonising the safety assessment of enzymes. CIAA welcomes the fact that the comments submitted during 2005 by the F&D industry on the initial drafts have been taken into account in the development of the final proposals.

During the upcoming co-decision procedure in the EP and Council, CIAA intends to support the Commission proposals to ensure that the measures proposed by DG Sanco are maintained and that the comitology procedure is applied. In parallel to the co-decision procedure for adoption of the proposals, CIAA is looking forward to the development by EFSA of the corresponding guidelines for the authorisation procedures for enzymes and additives. CIAA will continue with its efforts to obtain the introduction of a single authorisation procedure per additive, and also to retain the right to be granted temporary or national authorisations while the additives legislation remains under review. CIAA will also seek to increase its involvement in the intake assessment work that is being developed by EU and national bodies, in collaboration with other sectors in the food chain.
Food Contact Materials

The new Framework Regulation on Food Contact Materials (1935/2004/EC), adopted in October 2004, lays down general principles for all materials and articles that are intended to come into contact with food and includes traceability requirements that will apply as of 27 October 2006.

The European Commission is at the moment working on several proposals, amongst which:

- A 4th amendment to the Plastics Directive (2002/72/EC). CIAA’s main concern is to be entitled to information from packaging producers regarding the qualitative composition of the packaging and substances that may migrate into foods.
- A draft Regulation on active & intelligent packaging, i.e. materials and articles which are intended to extend the shelf-life, to maintain, improve, or monitor the condition of packaged food.
- A draft Regulation on recycled plastic materials and articles intended to come into contact with foodstuffs. This proposal aims to harmonise existing national legislation regarding the use of recycled plastic materials in food contact applications, and to establish common rules across the EU to ensure their safety.
- A draft Regulation relating to restrictions applying to closures, addressing the legal situation for PVC gaskets in lids intended for food contact applications, and the restrictions applicable to the use of phthalates for food contact applications.

Achievements

- **Plastics Directive**: CIAA welcomes the provisions on the declaration of compliance for packaging as they stand in the proposed 4th amendment to the plastics Directive. CIAA is cooperating with packaging producers to ensure that food operators are entitled to sufficient information about the qualitative composition of the packaging.
- **Closures**: CIAA and the Light Metal Packaging Manufacturers Association (SEFEL) have been working together in the “Metal Vacuum Closures Industry Group” (MVC-IG) since 2003, in order to address different issues regarding closures technology, while developing and implementing new technologies for plasticisers in metal caps. The Group liaises regularly with DG Sanco and national authorities in order to report on the status of new developments as well as to provide comments on the Commission proposal on restrictions for closures.
- **Recycled content**: CIAA welcomes and supports this new proposal, harmonising and setting common rules at EU level. CIAA also welcomes the amendments introduced to the proposal in its December 2005 version following comments from stakeholders and Member States, which leave the labelling provisions optional and link the restrictions regarding the use of recycled material with the technological substantiation applying on a case by case basis, subject to EFSA evaluation.

Challenges

- **Plastics Directive**: CIAA will keep up its efforts to ensure that the requirements in the Compliance Declaration for plastics are implemented as set in the 4th amendment. In addition, CIAA will continue its dialogue with the plastics industry to agree on best practice to ensure that food operators are informed about the qualitative composition and migration behaviour of packaging material.
- **Other Commission proposals**: CIAA will continue to follow these proposals and the work of the Commission working group on Food Contact Materials, in order to guarantee that the food industry’s views are taken into consideration.
In June, CIAA re-launched its International Standards Expert Group, tasked with actively participating in the development of international regulations. The Group will be responsible for working systematically on important Codex matters, preparing CIAA positions in advance of meetings of the Codex Alimentarius Commission (CAC), the FAO/WHO Coordinating Committee for Europe (CCEURO) and the Codex Committee on General Principles (CCGP), developing responses to calls for comment by these Committees, and attending these Committee meetings. In addition, the Group is responsible for sharing CIAA positions relating to Codex Alimentarius with counterparts from non-European countries and relevant industry NGOs, and internally coordinating specific CIAA positions on Codex prepared by CIAA’s “vertical” expert groups, such as the Consumer Information and Contaminants Groups.

Representatives of the International Standards Group met with the European Commission’s International Questions Unit in June to discuss possible strategies for greater CIAA–European Commission coordination on Codex Alimentarius issues. The European Commission great welcomes this initiative by CIAA, and agreed that CIAA should share comments systematically with the Commission in advance of Codex meetings in the future.

In July, CIAA attended the twenty-eighth session of the Codex Alimentarius Commission in Rome. In its position paper for the meeting, CIAA strongly supported the position of the U.S. requiring the credentialing of delegations attending Codex meetings, and proposed that the Codex Secretariat be entrusted with this task. CIAA also supported the discussion paper “Implementation of the WHO Global Strategy on Diet, Physical Activity and Health: Action that Could Be Taken by Codex” and its conclusion that more time was required to identify actions to be taken by Codex. CIAA informed the CAC that it looked forward to participating in discussions on how Codex could assist with the implementation of the WHO Global Strategy.

The European Commission, in its current capacity as a full member of Codex Alimentarius, can expect timely contributions from CIAA with regard to matters of particular concern to its membership.
As defined in EURAB 04.010-final (January 2004), a European Technology Platform (ETP) is “a major mission-oriented initiative aimed at strengthening Europe’s capacity to organise and deliver innovation - strengthening the Europe-wide innovation process. It will bring together relevant stakeholders to identify the innovation challenge, develop the necessary research programme and implement the results.” European Technology Platforms are “strategic, flexible and long-term alliances for technology to foster public-private partnerships across a range of stakeholder communities, including industry (multinational, national and SME), research (scientific and humanities), consumers, regulators, regional and national funding agencies, financial institutions, policy developers and opinion formers.”

The food industry has responded to this challenge.

“The preferences and expectations of consumers for quality, safety, convenience, diversity and health, serve to highlight the opportunities for innovation.”

Schematic presentation of the research areas required to reach the vision of the ETP Food for Life
The European Technology Platform (ETP) Food for Life was launched on 5 July 2005. The launch of the Platform reflected the need for innovation within the food & drink industry.

Following the launch of the Platform, an industry-led Board, chaired by Professor Peter van Bladeren (Nestlé), was formed along with six Expert Working Groups (WGs) reflecting the following science-led themes of:

- Food and Health;
- Food Quality and Manufacturing;
- Food and Consumer;
- Food Safety;
- Sustainable Food Production;
- Food Chain Management.

Two facilitating Expert Working Groups were also created. These are:

- Communication, Training and Technology Transfer;
- Horizontal Activities.

Together, these eight Expert Working Groups developed a draft Stakeholder Strategic Research Agenda (SSRA). This was the subject of an Expert Consultation on 2 February 2006. In accordance with the outcome of the consultation, the SSRA is now in the process of being revised and will be submitted to the European Commission in April 2006 for input into the formal development of the 7th Framework Programme (FP7).

The ETP Food for Life SSRA will:

- Describe and prioritise the science questions that need to be answered in the short, medium and long-term, in order to accomplish the vision described;
- Be translated into easy-to-read “layman versions” suitable for the various stakeholder sectors, and will be disseminated and publicised to ensure agreement and commitment;
- Contain technology roadmaps (an Implementation Plan) for priority thematic areas.

The challenge of stimulating and promoting innovation in the food chain requires the combination of a formal research-led approach and a structured, infrastructure-led approach, which will be developed and tailored to the needs of (larger) food companies and high-tech SMEs on the one hand, and medium and low-tech SMEs on the other.

A crucial next step in establishing a successful, widely accepted and supported Platform with a coordinated research approach will be the delivery of a Strategic Research Agenda (SRA) and Implementation Plan (IP). In order to ensure that the SRA reflects the needs and opportunities of the whole of Europe and that it is informed by expert input from differing stakeholder communities across the length and breadth of the continent, an initial series of national, regional and web consultations are planned for the period April-December 2006.

ETP vision

The vision of the ETP on ‘Food for Life’ is that an effective integration of strategically-focused, transnational, concerted research in the nutritional, food and consumer sciences and food chain management will deliver innovative, novel and improved food products for, and to, national, regional and global markets in line with consumer needs and expectations. These products, together with recommended changes in dietary regimes and lifestyles, will have a positive impact on public health and overall quality of life (‘adding life to years’). Such targeted activities will support a successful and competitive pan-European food & drink industry having global business leadership securely based on economic growth, technology transfer, sustainable food production, and consumer confidence.
The Dutch authorities are convinced that specific action on labelling legislation can lead to significant reductions in the administrative burdens faced by industry. The question of the adequacy of the EU labelling rules to the objective which they have been set up to fulfil was put forward by both the Luxembourg and the UK EU Presidencies.

In the context of the EU Platform for action, CIAA members agreed to support the following recommendations:

- Provide responsible and helpful communication about their food and drink products, in order that the consumer can readily assess the role of a specific food product in the context of a balanced diet. If, in this context, CIAA members choose to provide consumers, where practical and meaningful, with clear and user-friendly nutrition labelling, such as Guideline Daily Amounts (GDAs), they can do so using the CIAA agreed scientific reference values.
- Increase the use of other consumer information tools, such as websites, helplines, in-store leaflets and brochures.
- Make efforts to raise awareness among consumers of the existence and usefulness of nutrition labelling and other more general nutritional information tools.
- Use science-based, truthful and not misleading nutrition and health claims.

CIAA is working on a set of recommendations to implement “Better regulation” principles in the area of food labelling.

Nutrition Labelling

DG Sanco is expected to present a proposal to revise the existing nutrition labelling rules (Directive 90/496/EEC) by 2007. A broad consultation on a working document took place in January 2004. The main change envisaged was to make nutrition labelling compulsory on all products, thereby providing consumers with nutritional facts on a consistent basis about the food they eat. The debate on “diet, nutrition and health” which has arisen as a result of the obesity issue has triggered a move towards simplifying nutrition labelling (e.g. traffic lights, sign posting, etc.) and has led to a more thorough examination of how consumers understand nutrition information. Initiatives to provide nutrition information on labels have developed substantially in the course of 2005, be it initiatives from manufacturers or from national authorities.

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- Use science-based, truthful and not misleading nutrition and health claims.
Increase co-operation with public authorities in devising strategies to improve consumer understanding, and work with other stakeholders to ensure the availability of clear nutritional information.

Consumer surveys and testing of consumers' understanding all lead to the conclusion that oversimplification is not the answer. CIAA is in the process of developing a proposal that meets the needs of consumers and does not place disproportionate burdens upon SMEs. Such a proposal will be shared in due course with other members of the food chain (retailers and consumers in particular) in order to seek their support and buy-in to the concept.

Achievements

The Common Position significantly improves the Commission proposal in respect of the two controversial points: former Article 11 (which imposes a priori bans on certain health claims) and Article 4 which sets a ban on communication of health benefits linked to a food according to its level of fat, sugar and/or salt, although at the same time clearly stating that the nutrient profiles are a key element of the proposed regulation.

The European Parliament called for the deletion of Article 4, thus strongly supporting the right for food manufacturers to communicate health benefits of their foodstuffs. The Parliament also introduced the notification procedure i.e. a concept of a lighter procedure (other than authorisation) for certain types of health claims.

The challenge is to find the right compromise on Article 4 and the procedure, which will provide manufacturers with the legal security needed to encourage innovation and which will be flexible enough to ensure that, within each product category, operators have an incentive to develop healthier options.

The future Regulation on the Addition of Vitamins and Minerals should encourage the research and innovation efforts being made by the F&D industry to respond to changing lifestyles and to open up these advantages to all Europeans.

Challenges

Nutrition and health claims

On 16 July 2003, the Commission adopted a proposal for a Regulation on Nutrition and Health Claims on Foods. This proposal aims to establish a harmonised regulatory framework for all claims. Manufacturers may only make nutrition claims or general health claims if these appear in a positive list of permissible claims. Innovative health claims (and in particular, those which claim to reduce the risk of contracting certain diseases) will be covered by a pre-market authorisation procedure, via EFSA. Following the European Parliament vote in first reading, the Council adopted its common position in December 2005. The timetable for second reading foresees a vote in plenary in May 2006.

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Addition of vitamins, minerals and other substances to foodstuffs

The Commission proposal adopted in November 2003 was generally welcomed by industry, despite the cross reference to the claims proposal on the nutrient profiles to be used when setting maximum levels for vitamins and minerals. This dossier has been linked by the authorities to the claims dossier, meaning that no agreement can be reached in second reading on the addition of nutrients if the claims dossier is not settled. The timetable in the European Parliament will follow the same pace with a vote in second reading scheduled for the May 2006 plenary session.

As far as the F&D industry is concerned, the prior condition for adding any vitamin or mineral to a food is that it must be safe for the consumer. This principle forms the basis of the Commission’s proposal, and food safety must be the sole criterion applied when setting maximum thresholds for the addition of vitamins or minerals to foodstuffs.

CIAA has expressed its misgivings about Member States being allowed to take national initiatives (safeguarding measures, etc.) that could create new barriers to the free movement of goods. Moreover, CIAA believes that all categories of foods should be able to be fortified, as long as consumer safety is guaranteed. Any measure aimed at excluding certain product categories would only place unnecessary restrictions on consumer choice.

EFSA will be responsible for carrying out a risk assessment on the addition of substances other than vitamins or minerals, prior to authorising the addition of a new substance to a given foodstuff. Members States will be able to express any reservations they may have about the authorisation of a new substance. Nevertheless, CIAA believes that any such decision should be scientifically substantiated and would only be justifiable on public health grounds.
On 15 March 2005, the European Commission launched the European Platform for action on Diet, Physical Activity and Health. This followed a series of roundtable discussions with relevant stakeholders and was a response to the WHO Global Strategy on Diet, Physical Activity and Health, adopted in May 2004 at the World Health Assembly.

The aim of the European Platform is to improve public health, promote healthy lifestyles, help fight against the increasing public health threat of obesity, and provide a forum for all interested European level actors where:

- concrete discussion occurs along the lines of specific plans aimed at effectively contributing to the pursuit of healthier nutrition, greater physical activity, and in particular concerning the fight against obesity;
- outcomes and experience from actors’ performance can be reported and reviewed, so that over time better evidence is assembled regarding what works, and how best practice can be more clearly defined.

The EU Platform incorporates a series of relevant players and stakeholders who, for 2006, have committed themselves to devoting greater levels of effort and resources, beyond their baselines, which are designed to reverse the obesity trend.

The fields of action identified in the EU Platform are:

- Consumer information, including labelling
- Education
- Physical activity promotion
- Marketing and advertising
- Composition of foods, availability of healthy food options, and portion sizes.

“In addition to improved public health education, information on nutrition and healthy lifestyles is urgently needed to help solve current health problems.”
CIAA has supported the Commission’s initiative to establish a European Platform for action on Diet, Physical Activity and Health and has been actively and constructively working to deliver concrete actions within this framework. Since the launch of the EU Platform in March 2005, CIAA and its members have made considerable progress. In October 2005, the CIAA Board of Directors adopted the CIAA Commitments for 2006 to drive action within the framework of the EU Platform. Working with other partners, the F&D industry will concentrate its efforts on several of the areas addressed in these commitments.

Action will be taken on:

- Partnerships with other EU Platform members such as governments, public health authorities, consumer associations, etc.
- Public education and physical activity programmes, enabling consumers to make healthier lifestyle choices, such as the “Shape Up” and “EPODE” programmes, executed in partnership between governments and the private sector.
- Consumer information, helping consumers make informed choices about food and having clear nutrition information.
- New advertising and marketing practices which follow clearly defined principles, along with campaigns promoting healthier lifestyles.
- Products and choices available to consumers corresponding to demands for taste, nutrition and convenience while encouraging a healthy lifestyle.
- Research to keep the industry up to date with changing consumer demands and close cooperation with the European Technology Platform Food for Life.

CIAA’s Commitments were presented to the European Commission and members of the EU Platform in November 2005, and their implementation is ongoing.

Within the EU Platform, the European Commission has set up different Working Groups to deal with concrete issues. These include the establishment of Working Groups on:

- Informing Consumer Behaviour, covering Education, Consumer information and Commercial communications;
- Healthy Lifestyles and Physical Activity;
- Monitoring.

The food and drink industry has also responded to political and public pressure on advertising and commercial communication. In October 2005 the CIAA Board of Directors adopted the new CIAA Food and Beverage Product Marketing Communications Principles, complementing the ones adopted in February 2004 relating to advertising.

Effective self-regulation in advertising has been strongly supported by the food and drink industry, along with proportionate and effective solutions to the obesity issue. Tackling the issue will require multiple strategies and the sustained efforts of many sectors.

European Commission Green Paper “Promoting healthy diets and physical activity…”


The Commission is preparing a series of Community strategies for the prevention of obesity and chronic diseases. In this context, the Green Paper aims at opening a broad-based consultation process and at launching an in-depth discussion, involving the EU institutions, Member States and civil society, on the development of a Community Strategy on diet, physical activity and health.

Among the issues raised in the Green Paper, consumer information, advertising and marketing practices along with the role of self-regulation, are the most relevant ones for the food and drink industry.

In coordination with its members, CIAA has examined in great detail the Commission’s Green Paper. In early April 2006, CIAA forwarded to the Commission its comments, reflecting the collective concerns of the European food and drink industry.

The increasing prevalence of obesity is a challenge for society. Nutrition makes an important contribution to public health and CIAA is committed to playing its part along with all relevant stakeholders to improve the situation. CIAA strongly believes that improved public health education on nutrition and healthy lifestyles is urgently required in order to solve current health problems.

The success of the European food and drink industry depends on understanding consumers, providing products that meet their requirements, and communicating with them. This knowledge and understanding of the consumer makes us well equipped to work for their benefit collectively, with legislators and relevant partners.

Ever since the launch of the EU Platform, considerable effort and resources have been undertaken by the food and drink industry in seeking to fulfill its objectives. In the future, the CIAA reporting programme will widely communicate the progress made by the food and drink industry and the active role that is being played under the EU Platform in the promotion of healthier lifestyles and a balanced diet.
In pursuit of sustainable production and consumption, each actor along the food and drink lifecycle has to continuously improve the environmental performance in their direct sphere of responsibility.

The classification of a given industrial output either as “product” or as “waste” under EU waste law has important consequences for resource-efficiency and the competitiveness of the food and drink sector. Besides their core products, food and drink companies also produce a wide range of by-products, which are regarded by other industries as valuable and sometimes essential input. At the same time, the ambiguous definition of “waste” under current EU waste law has resulted in legal uncertainty which often leads to the classification of these materials as waste, resulting in wastage of resources and an increase in materials going as waste for final disposal. A key success factor for resource-efficiency in the food and drink sector is therefore an adequate distinction between product and waste.
In 2005, key deliverables emerged from the CIAA initiative on Integrated Resource and Waste Management (IRWM) in cooperation with the European Commission and various key actors from the food and feed chain. With a view to overcoming the ambiguities of the current waste definition, the IRWM forum has developed a decision tool to clearly distinguish between product and waste based on a set of agreed criteria (suitability of a material as input, intention to exploit or market the material, compliance with legal requirements, existence of a market). Also, industry guidelines on the sustainable management of resources in the food & drink sector have been adopted by the IRWM platform. These tools promote the most efficient use of organic materials produced in the food & drink sector, in line with a high level of environmental protection.

In December, the Commission adopted a Thematic Strategy on waste prevention and recycling and a legislative proposal for a revised Waste Framework Directive (WFD). In 2006, the co-decision process on the legislative proposal will be launched between Council and Parliament. Parliament and Council will also give their opinions on the Thematic Strategy on waste. For CIAA it will be vital to clearly communicate its position to Parliament, Council and Commission to ensure that the tools developed by CIAA in the IRWM forum as well as the recent jurisprudence of the European Court of Justice, which further strengthens the CIAA arguments, will be properly reflected in the revised WFD. This would not only clarify the legal situation for economic operators and competent authorities, but also make a significant contribution to the minimisation of resource consumption and waste generation in the EU food and drink sector.

EU Greenhouse Gas Emission Trading Scheme

On 1st January 2005, the EU Greenhouse Gas Emission Trading Scheme (ETS) commenced operation. On the basis of the ETS Directive, National Allocation Plans (NAPs) established by the Member States decide on the distribution of CO₂ emission allowances between the various sectors and industrial installations. The EU ETS is mandatory for food & drink combustion installations with a rated thermal input exceeding 20 MW. The importance of the scheme for the food & drink sector is reflected in the fact that, for instance, in France 13.6% of all ETS installations are food and drink sites.

CIAA has carefully examined the different NAPs and assessed the overall EU ETS impact on food & drink installations. Due to the leeway given to Member States under the EU ETS Directive, the NAPs of the first trading period (2005-2007) show great diversity in their allocation methodologies and contain inconsistent interpretations of the scope of the scheme. In addition, the ETS compliance burden for small installations, in particular the monitoring and reporting requirements, is often disproportionate to the low level of their actual emissions. In order to address these priority issues for the food and drink sector, CIAA has developed a common position and participated actively in the Commission stakeholder consultations on the review of the EU ETS and its monitoring and reporting guidelines.

The Commission is reviewing the EU ETS Directive and will submit by June 2006 a report to Council and Parliament, thereby launching co-decision on a revised scheme. While legislative changes to the ETS Directive will only affect post-2012 trading periods, Member States are set to deliver their NAPs for the second trading period (2008-2012) by June 2006. The major challenge concerning future trading periods is to ensure a consistent implementation of the ETS scope in all Member States, to promote more harmonised allocation rules in order to provide a level playing field for food & drink companies and to achieve a significant reduction of the compliance burden for small food and drink installations to ensure the cost-effectiveness of the scheme.
Integrated Pollution Prevention and Control

**Background**

Directive 96/61/EC on Integrated Pollution Prevention and Control (IPPC) is paving the way towards more sustainable production patterns by setting common rules on environmental permitting of industrial installations. Correct implementation of the IPPC Directive is therefore a key priority for CIAA. For many years, EU food and drink companies have made significant investments in clean technologies and Best Available Techniques (BATs) in order to conserve natural resources and minimise waste generation. Since 2001, CIAA has co-operated intensively with the European Commission and the IPPC Bureau in drawing up a reference list of BATs (BREF document) for the food, drink and milk sectors (FDM).

**Achievements**

In November, the IPPC Information Exchange Forum (IEF) officially endorsed the FDM BREF document. The approval of the BREF successfully finalises six years of intensive work in which CIAA has played a very active role in providing quantitative and qualitative data and case studies and in maintaining ongoing contacts with the IPPC Bureau. CIAA appreciates the transparent exchange of information in the FDM BREF drafting phase and strongly welcomes the overall balanced approach of the final BREF document. Among the major generic BAT conclusions, the BREF recognises landspreading as a valid end-of-pipe wastewater treatment technique to manage effluents and by-products. The FDM BREF will help food and drink industrial sites to improve their environmental performance and guide authorities in granting environmental permits.

Concerning the implementation of the final FDM BREF by national authorities, it will be essential for CIAA to ensure that the FDM BREF is used as a “reference document”, which should never impose a “one-technique-fits-all” approach for all cases. Proper consideration of geographical location, local environmental conditions and hygiene and food quality constraints should be given when deciding the techniques to be applied.

In 2006, the Commission will also launch a review of the IPPC Directive with a view to adopt by 2007 a Communication and legislative proposal on a revised Directive. In order to promote an effective implementation of the IPPC Directive, CIAA will participate actively in the revision process to ensure - for example - that the review process brings a technical clarification of the scope of covered activities and installations.

Integrated Product Policy

**Background**

The Commission is working on the implementation of its Communication on Integrated Product Policy (IPP), which aims to reduce the environmental impact of products throughout their life-cycle. IPP builds on measures for producers to design products with reduced environmental impact, and measures for consumers to prefer products with the lowest environmental impact. Potential IPP measures include new taxes and subsidies, public procurement, new pieces of legislation, product-design obligations, voluntary agreements and standardisation. Within the IPP process, the Commission will focus on product categories with the highest environmental impact and the highest potential for environmental improvement.

**Achievements**

In April, the Commission published a draft report of the study “Environmental Impact of Products” (EIPRO) which aims to identify product categories with the highest environmental impact and which also analyses the role of food and drink products. CIAA has undertaken an in-depth analysis of the draft EIPRO study and has submitted a detailed written contribution to the Commission consultation challenging the reliability of the draft report. CIAA also participated in a Commission stakeholder meeting on the EIPRO study in July. CIAA pointed out several methodological shortcomings of the draft report and put forward constructive examples and proposals for the continuous improvement of environmental performance in the food chain.
The Commission is currently assessing the impact of the EU Packaging and Packaging Waste Directive (PPWD). In a first step, the Directive’s achievements and influence on both the environment and the internal market have been evaluated. To this end, three studies have been carried out on the implementation of the PPWD to explore the options available for increasing the prevention and re-use of packaging in addition to internal market aspects. Based on the studies’ conclusions, a report by the Commission giving clear recommendations on the future direction of EU packaging policy is expected for early 2006.

CIAA actively participated in this in-depth evaluation carried out by the Commission. This assessment shows a substantial increase in recycling and recovery rates in Europe, partly due to the PPWD. Statistics confirm that packaging use has grown only moderately since 1998 (less than 1% annually) whereas tonnes of waste recovered and tonnes of material recycled have grown by 21% and 20% respectively between 1998 and 2002. These figures show a relative decoupling of environmental impacts of waste from economic growth and product use. The food and drink industry continues its efforts in packaging source reduction and plays a key role in the reduction of packaging waste.

On the basis of these studies, the Commission is expected to present to the Council and the European Parliament a report on the progress of the implementation of the PPWD. This report could be accompanied by proposals for a revision of specific provisions of the PPWD related to the recycling and recovery targets, prevention and re-use.

Three key points have emerged from these studies that should be taken into account in any future revision of the PPWD. Firstly, no increase of the overall recycling and recovery targets should be advocated. Secondly, the Commission should ensure that all Member States enforce the Essential Requirements of the Directive, rather than prescribing any additional prevention measures or developing a packaging environment indicator. Finally, there is no need to systematically promote re-usable packaging as no hierarchy exists between the re-use of packaging and the recovery of packaging waste, and factors that make packaging re-use systems environmentally preferable in certain cases are very context specific.

While the EU food and drink industry is firmly committed to the continuous improvement of its products’ environmental performance, the current IPP approach appears to overlook the social and economic pillars of sustainable development. It thereby neglects important characteristics of food products, including quality, health, nutritional value, safety and consumer choice. Instead of mapping “hot spots”, IPP should foster innovation to continuously improve the environmental, economic and social performance of products at each stage of the life-cycle. As far as food and drink products are concerned, compliance with the highest nutritional, health and safety requirements constitutes the overriding priority of producers vis-à-vis the consumer. Mandatory IPP tools based on purely environmental grounds could affect this priority and are therefore unsuitable for food and drink products.
CIAA European Parliament Evening

29 November 2005

The CIAA annual evening reception in the European Parliament took place on 29 November and was again a success bringing together about 200 participants, including MEPs, assistants, parliament staff and industry representatives.

Given that the theme of the evening was the presentation of the CIAA commitments for the EU Platform for Action on Diet, Physical Activity and Health, CIAA was honoured to have Ms Frédérique Ries MEP, EP rapporteur on the Green paper on “Promoting healthy diets and physical activity: Towards a European strategy for the prevention of overweight, obesity and chronic diseases,” as sponsor for the evening.

Addressing the audience, Jean Martin reiterated CIAA support for the Platform and the recognition at EU level of the multiple causes of obesity. He highlighted the collective nature of the commitments and the continuity within the action of the Platform in the long history of the initiatives of the food and drink industry in promoting healthy eating and healthy lifestyles. He then went on to outline the areas in which CIAA is committed to encouraging its members to develop and join actions: partnerships with other Platform members, Member States, public health officials, consumer associations etc; public education and physical activity programmes to encourage consumers to make healthy lifestyle choices; consumer information to help them make informed choices and clearly understand nutritional information; advertising and marketing communications that follow clearly defined new principles, and campaigns to promote healthy lifestyles; products and choice available to consumers that correspond to demands for taste, nutrition and convenience; and research to support development of innovative food products and processes to respond to changing consumer demands.

The evening served in general to raise and enhance the visibility of CIAA in the European Parliament, and in particular to highlight the action taken by CIAA to accelerate, deepen and widen the ongoing efforts of the food and drink industry in the area of diet and health and to confirm the active role of industry and its contribution towards achieving further progress and tangible results.
Electronic media

■ CIAA - www.ciaa.be

CIAA’s website is the gateway to information on the European food and drink industry. Broken down into a number of different areas, the portal covers a broad spectrum of issues, and seeks to provide users with relevant and up-to-date information, both quickly and easily. The site gives access to the latest food and drink industry positions, press releases, highlights previous and upcoming events, and summarises important issues affecting the EU F&D sector.

■ EU Food Law - http://eufoodlaw.ciaa.be

The EU Food Law website replaces CIAA’s existing CD-Rom on EU Food Law. Previously, CIAA issued two editions of the CD-Rom annually (summer and winter). The strength of the new website means that information is updated at regular intervals, allowing users access to the most up-to-date legislative developments. The site covers adopted and proposed legislation. It allows users to follow step-by-step the development of a legislative text, from its drafting by the Commission to its publication in the Official Journal and its subsequent entry into force.

■ European Technology Platform - http://etp.ciaa.be

Under the auspices of CIAA, The European Technology Platform (ETP) ‘Food for Life’ website, is a tool aimed at bringing together academia, F&D industry stakeholders and pan-European organisations. The “Food for Life” ETP was launched on 5 July 2005 and aims to address the challenges and opportunities of the European food chain. As of printing, the site acts as a forum for discussion; disseminating papers, presentations, and publications - all aimed in the short term at least in helping shape a future Stakeholders’ Strategic Research Agenda (SSRA). This in turn will be considered by the Commission in light of the 7th Framework Programme (FP7). All latest ETP developments are updated regularly.

Publications

■ Data and Trends Report 2005

Every year CIAA publishes an up-to-date brochure on the state of the EU F&D industry. The brochure for 2005 analyses the key data and trade figures for the period 2001-2004, highlighting in particular important information and data on global food trade, the growing importance of many Asian countries for European food and drink exports, consumption figures and habits, as well as the ranking of leading food companies both in Europe and internationally.

■ CIAA Memoranda to the EU Presidencies

At each rotation of the EU Presidency, CIAA publishes a summary of its positions on major EU legislative developments to be dealt with during the Presidency, and puts forward the challenges facing the F&D industry.

■ European Technology Platform on ‘Food for Life’ - The vision for 2020 and beyond

The core team of the ETP has published this brochure - also known as ‘the Vision Document.’ This brochure describes the vision for the F&D industry for 2020 and beyond. CIAA’s ETP website complements this publication.

■ CIAA Reflection Paper on Food and Drink Industry Competitiveness

Ahead of the Lisbon mid-term review in March 2005, CIAA published a brochure identifying issues of particular interest to the food and drink industry sector. The brochure highlights key challenges facing the industry in order to ensure future competitiveness. The brochure points to the fact that for Europe to remain an attractive location for continued industry investment, including R&D, certain worrying facts - such as the slowing down of productivity growth and low value added growth - require appropriate, coordinated and proactive action.

All publications are available for download via CIAA’s website.
CIAA coordinates various actions on a daily basis with its members, national federations, European sector associations and major food and drink companies.

On more specific and technical subjects, CIAA also works in close collaboration with other public and private organisations that deal with matters of interest to the food and drink sector. These relations seek to exchange points of view, share objectives, coordinate actions and increase the overall impact of all of CIAA’s actions, by making use of potential synergies.

CIAA has developed partnerships with other links in the food chain, from the agricultural sector right through to consumers, both at European and international level. CIAA aims to play a leadership role in order to reinforce the links throughout this chain and develop a common awareness of the challenges that lie ahead.

### Agricultural policy

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>COPA-COGECA</td>
<td>European Committee of Agricultural Producers and Co-operatives</td>
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</table>

### Diet, physical activity and health

<table>
<thead>
<tr>
<th>Organisation</th>
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<tbody>
<tr>
<td>EuroCommerce</td>
<td>The retail, wholesale and international trade representation to the EU</td>
</tr>
<tr>
<td>EUFIC</td>
<td>European Food Information Council</td>
</tr>
<tr>
<td>EMRA</td>
<td>European Modern Restaurant Association</td>
</tr>
<tr>
<td>EVA</td>
<td>European Vending Association</td>
</tr>
<tr>
<td>FESI</td>
<td>Federation of the European Sporting Goods Industry</td>
</tr>
<tr>
<td>ILSI-Europe</td>
<td>International Life Science Institute</td>
</tr>
<tr>
<td>WFA</td>
<td>World Federation of Advertisers</td>
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### Food additives and ingredients

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>AMFEP</td>
<td>Association of European Manufacturers and Formulators of Enzyme Products</td>
</tr>
<tr>
<td>CEFIC</td>
<td>European Chemical Industry Council</td>
</tr>
<tr>
<td>EFFA</td>
<td>European Flavour and Fragrance Association</td>
</tr>
<tr>
<td>ELC</td>
<td>Federation of European Food Additives and Enzymes Industries</td>
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<tr>
<td>ISA</td>
<td>International Sweeteners Association</td>
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### Food safety/traceability

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### GMOs

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<tbody>
<tr>
<td>AMFEP</td>
<td>Association of European Manufacturers and Formulators of Enzyme Products</td>
</tr>
<tr>
<td>FEFANA</td>
<td>EU Feed Additive and Premixture Association</td>
</tr>
<tr>
<td>EUROPABIO</td>
<td>European Association of Biotechnology Industries</td>
</tr>
<tr>
<td>COCERAL</td>
<td>European Association Representing Trade in Cereals, Feedstuffs, Oilseeds,</td>
</tr>
<tr>
<td></td>
<td>Olive Oil and Agrosupply at the European Union</td>
</tr>
<tr>
<td>FEFAC</td>
<td>European Feed Manufacturers Federation</td>
</tr>
</tbody>
</table>

### Horizontal organisations

<table>
<thead>
<tr>
<th>Organisation</th>
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<tbody>
<tr>
<td>AIM</td>
<td>European Brands Association</td>
</tr>
<tr>
<td>EUFIC</td>
<td>European Food Information Council</td>
</tr>
<tr>
<td>ILSI-Europe</td>
<td>International Life Science Institute</td>
</tr>
<tr>
<td>UNICE</td>
<td>Union of Industrial and Employers’ Confederations of Europe</td>
</tr>
</tbody>
</table>

### International

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Codex Alimentarius</td>
<td>Food and Agriculture Organisation of the United Nations</td>
</tr>
<tr>
<td>FAO</td>
<td>International Organization for Standardisation</td>
</tr>
<tr>
<td>ISO</td>
<td>Organisation for Economic Co-operation and Development</td>
</tr>
<tr>
<td>OCDE</td>
<td>United Nations Environment Programme</td>
</tr>
<tr>
<td>WHO</td>
<td>World Health Organization</td>
</tr>
<tr>
<td>WTO</td>
<td>World Trade Organization</td>
</tr>
</tbody>
</table>

### Packaging

<table>
<thead>
<tr>
<th>Organisation</th>
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</tr>
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<tbody>
<tr>
<td>ASSURRE</td>
<td>Association for the Sustainable Use and Recovery of Resources in Europe</td>
</tr>
<tr>
<td>AIM</td>
<td>European Brands Association</td>
</tr>
<tr>
<td>EUROPEN</td>
<td>European Organisation for Packaging and the Environment</td>
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</tbody>
</table>
Board of Directors

The Board of Directors is CIAA’s policy-making body. It defines the broad lines and strategic direction of CIAA’s policies and priorities.

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Mr Otto Bloder*
Director General, Unilever Austria

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Mr Guido Kayaert
Vice-President, Nestlé Belgilux
Mr Michel Delbaere*
President FEVIA, Crop’s NV

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President, PKCR-FFDI
Mr Miroslav Koberna*
Director, PKCR-FFDI

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Director, Danish F&D Federation

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Director, ETL- Estonian Federation

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Director, ETL-Finnish Federation

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President, FICT - Fédération française industriels charcutiers

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Spokesperson for the Committee of Directors, Schwartauer Werke GmbH & Co

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Mr Bela Fischer*
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Vacant
Vacant*

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Export Manager, Pancrazio Spa

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Managing Director, Latvian Federation of Food Enterprises
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Director, Rīgas Raugs

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Director European General Affairs, Ferrero
Mr Edmond Müller*
President, FEDIL

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Vacant*

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Director General, PPFS

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Board Member, St Nicolaus-Trade a.s

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Deputy Director, Nestlé Spain

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President, LI
Vacant*

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Chairman and CEO, PB Services
Ms Aileen Richards
Vice-President Supplier Development, Masterfoods Europe

European Committee of Large F&D Companies (Liaison Committee)
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Vice-Chairperson, Tate & Lyle
President API
Mr José Nuñez Cervera
President European Public Affairs, Coca-Cola Europe, Eurasia & Middle East

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1st transformation vegetal
Mr Jacques Pellerin, President AAF

2nd transformation liquid
Ms Dominique Reiniche, President UNESDA
Mr Rodolphe De Looz-Corswarem*, Secretary General, The Brewers of Europe

2nd transformation solid
Mr David Zimmer, Secretary General, CAOBISCO

Intermediary products
Mr Yves Goemans, President EUVEPRO
Mr John Gillespie*, President FEDIMA

(*) Substitute

Last update 07/03/2006
Delegates from national federations, European sector associations and companies, as well as experts on F&D form the CIAA's Committees and Expert Groups. They work together using their expertise to follow various dossiers, analysing specific issues and propose to the Board of Directors on how to approach and pursue a political solution.
CIAA Members

NATIONAL FEDERATIONS

Austria
FIAA – Fachverband Lebensmittelindustrie
www.dielebensmittel.at

Belgium
FEVIA – Fédération de l’Industrie Alimentaire/Federatie Voedingsindustrie
www.fevia.be

Czech Republic
PKCR - Potravinářská Komora České Republiky
www.foodnet.cz

Denmark
FI – Foedevareindustrien
www.fi.dk

Estonia
ETL – Eesti Toiduainetööstuse Liit
www.etl.ee

Finland
ETL – Elintarviketoimiallisliitto
www.etl.fi

France
ANIA – Association Nationale des Industries Alimentaires
www.ania.net

Germany
BLL – Bund für Lebensmittelrecht und Lebensmittelkunde
www.bll.de

BVE – Bundesvereinigung der Deutschen Ernährungsindustrien
www.bve-online.de

Greece
SEVT – Συνδέσμος Ελληνικών Βιομηχανιών Τροφίμων
www.sevt.gr

Hungary
EFOSZ – Elelmiszerfeldolgozók Országos Szövetsége
www.efosz.hu

Ireland
FDII – Food & Drink Industry Ireland
www.fdii.ie

Italy
FEDERALIMENTARE – Federazione Italiana dell’Industria Alimentare
www.federalimentare.it

Latvia
LPUF – Latvijas Pārtikas Uznēmumu Federācija
www.lpuhf.lv

Luxembourg
FEDIL – Fédération des Industries Agro-alimentaires Luxembourgeoises

Poland
PFPZ – Polska Federacja Producentów Żywności
www.pfpz.pl

Portugal
FIPA – Federação das Indústrias Agro-alimentares
www.fipa.pt

Slovakia
PKS – Potravinárska Komora Slovenska
www.potravinari.sk

UPZPPS – Unia Podnikatelov a Zamestnavatelov v Potravinarskom Priemysle na Slovensku

Slovenia
GZS – Gospodarska Zbornica Slovenije
www.gzs.si

Spain
FIAB – Federación Española de Industria de la Alimentación y Bebidas
www.fiab.es

Sweden
LJ – Länsmedelsföretagen
www.lj.se

The Netherlands
FNLI – Federatie Nederlandse Levensmiddelen Industrie
www.fnli.nl

United Kingdom
FDF – Food & Drink Federation
www.fdf.org.uk

Observers:
Norway
NBL – Næringsmiddelbedriftenes Landsforening
www.nbl.no

Romania
Romalimenta – Federația Patronală din Industria Alimentara
www.romalimenta.ro

EUROPEAN COMMITTEE OF LARGE FOOD AND DRINK COMPANIES
(Liaison Committee)

ADM
www.admworld.com

BUNGE
www.bunge.com

CAMPBELL EUROPE
www.campbellsoup.com

CARGILL
www.cargill.com

COCA-COLA
www.cocacola.com

DANONE
www.danone.com

FERRERO
www.ferrero.com

HEINEKEN
www.heineken.com

HEINZ
www.heinz.co.uk

INBEV
www.inbev.com

KELLOGG’S
www.kelloggs.com

KRAFT FOODS
www.kraftfoods.com

MASTERFOODS
www.masterfoods.com

NESTLE EUROPE
www.nestle.com

PEPSICO
www.pepsico.com

PERNOD RICARD
www.pernod-ricard.com

PROCTOR & GAMBLE
www.pg.com

SARA LEE
www.saralee-de.com

SÜDZUCKER
www.suedzucker.de

TATE & LYLE
www.tateandlyle.com

UNILEVER
www.unilever.com
SECTORS

**Bakery**
AIBI – International Association of Industrial Bakery
www.aibi-online.org

**Beer**
The Brewers of Europe
www.brewersofeurope.org

**Bottled Water**
EFBW – European Federation of Bottled Water
www.efbw.org

**Breakfast Cereal**
CEEREAL – European Breakfast Cereal Association

**Broth & Soup**
FAIBP – Federation of the Associations of the EU Broth and Soup Industries

**Cereal Flour**
GAM – European Flour Milling Association
www.ecco-eu.com

**Chocolate, Biscuits & Confectionery**
CAOBISCO – Association of the Chocolate, Biscuit and Confectionery Industries of the EU
www.caobisco.com

**Dairy Products**
EDA – European Dairy Association
www.euromilk.org

**Dietetic Products**
IDACE - Association of Dietetic Food Industries of the EU
www.idace.org

**Fruit & Vegetable Juices**
AIJN – Association of the Industry of Juices and Nectars
www.aijn.org

**Fruit & Vegetable Preserves**
OEITFL – Organisation of European Industries Transforming Fruit and Vegetables
www.oeitfl.org

**Ice Cream**
EUROGLACES – Association of the Ice Cream Industries of the EU

**Intermediate Products for Bakery & Confectionary**
FEDIMA – European Federation of the Intermediate Products Industries for the Bakery and Confectionery Trades
www.fedima.org

**Isoglucose**
API – Association of Producers of Isoglucose of the EU

**Margarine**
IMACE – International Margarine Association of the Countries of Europe
www.imace.org

**Non-alcoholic Beverages**
UNESDA – Union of European Beverages Association
www.unesda-cisda.org

**Oils**
FEDIOL – Seed Crushers’ and Oil processors’ Federation of the EU
www.fediol.be

**Pasta**
UNAPPA – Union of Organisations of Manufacturers of Pasta Products
www.unipipi-pasta.it

**Pet Food**
FEDIAP - The European Pet Food Industry
www.fediap.org

**Processed Meat**
CLITRAVI – Liaison Centre for the Meat Processing Industries
www.clitravi.com

**Processed Potatoes**
UEITP - European Association of Potato Processing Industries

**Salt**
EUSALT – European Salt Producers’ Association
www.eu-salt.com

**Sauces**
FIC – Federation of the Condiment and Sauce Industries

**Semolina**
SEMOULIERS – Union of Associations of Semolina Manufacturers in the EU
www.semoulliers.org

**Snacks**
ESA – European Snacks Association
www.esa.org.uk

**Soluble & Roasted Coffee**
ECF – European Coffee Federation
www.ecf-coffee.org

**Spices**
ESA – European Spice Association

**Starch**
AAF – European Starch Industry Association
www.aaf-eu.org

**Sugar**
CEFS – European Committee of Sugar Manufacturers
www.cefs.org

**Tea & Herbal Infusions**
EHIA – European Herbal Infusions Association
www.ehia-online.org

**ETC** – European Tea Committee
www.etc-online.org

**Vegetable Proteins**
EUVEPRO – European Association of Manufacturers, Distributors and Users of Vegetable Proteins for Human Consumption
www.euvepro.org

**Yeast**
COFALEC – The Bakery Yeast Manufacturers Committee of the EU
www.cofalec.com