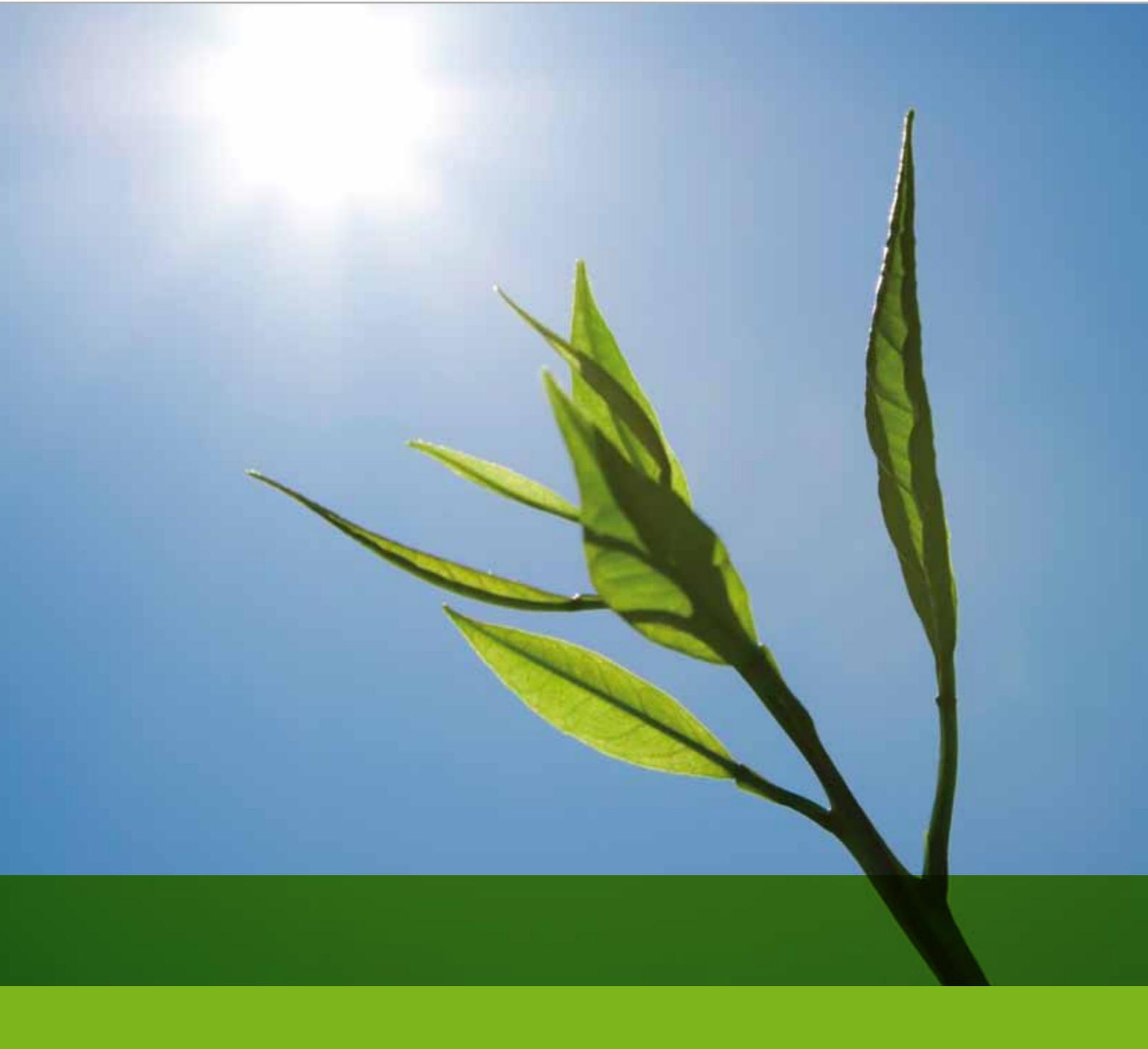




ENVIRONMENTAL SUSTAINABILITY VISION TOWARDS 2030



FOREWORD



Europe's first manufacturing sector, the food and drink industry, puts sustainable growth at the heart of its business model. It does so not only because it makes good business sense but also because of the unique relationship that industry has with the environment, on which it relies for a continuous, adequate supply of safe, high quality, raw materials from which to make world-renowned food and drink products. Ensuring green growth, therefore, not only helps safeguard the earth's limited natural resources but also secures the long-term competitiveness and prosperity of Europe's food and drink industry.

It is for these reasons that Europe's food and drink industry is investing in its future and that of Europe's 500 million citizens to promote smart, green growth, through the adoption of a FoodDrinkEurope Environmental Sustainability Vision towards 2030, underpinned by a set of steps needed for its accomplishment. The Vision is the result of a broad collaborative work together with

other stakeholders along the supply chain, governments, civil society, research and academia. It goes some way to ensuring that the efforts of Europe's food business operators to meet the tall challenges and expectations of society – regulators, academics and partners along the chain, including consumers – can be met if we are to make headway in securing the sustainable future of both our industry, and of course, of the planet.

Yet, the adoption of this Vision for 2030 is not the beginning of the industry's efforts in this area. Food manufacturers have come a long way already in a relatively short space of time. Since the publication of the last FoodDrinkEurope Environmental Sustainability Report in 2008, an increasing number of companies -large and small- have continued to step up their efforts to implement sustainable practices in their own business operations and via collaborative activities with other stakeholders across the supply chain – from ensuring sustainable sourcing of raw materials to promoting greater resource efficiency and to championing sustainable production and consumption. This is a significant achievement for the industry, not least because of its highly fragmented nature with 99% of the number of companies either small or medium in size.

In this report, you will read an array of best practice examples from food operators in the areas mentioned above. It is the latter, sustainable consumption and production, on which I would like to focus. Food operators are fully committed to playing their part in doing business more sustainably. But, as is the case when food is wasted in the household, the efforts made throughout the supply chain to produce that food sustainably, are also then wasted if consumers are not more aware of the adverse effect that this has on the environment. Hence, the efforts of all actors in society are needed if we want to deliver a greener economy and better world for generations to come.

An excellent example of a successful initiative in this area is the **European Food Sustainable Consumption and Production Round Table**, a ground-breaking multi-stakeholder platform launched in 2009, initiated by FoodDrinkEurope and co-chaired by the European Commission, in conjunction with other actors, gathering together food chain partners, policy-makers and civil society to collaborate on environmental sustainability issues for the first time. The Round Table has made a number of landmark achievements already in its brief existence – from agreeing on a set of guidelines for the environment impact assessment of food and drink products throughout their entire product life-cycle, to how to communicate this information along the chain, including to the consumer.

As the example above makes clear, increasingly, 'whole of society' efforts are needed to ensure sustainable growth both in Europe and beyond, with each actor playing his respective part. In doing so, together, we can demonstrate that the 'triple win' of sustainability – across the social, environmental and economic pillars which form its basis- is not only achievable but also a legacy that this generation can be proud of.

Jesús Serafin Pérez
President



A WORD FROM THE COMMISSIONER



Food and drink play a fundamental role in our daily lives - but feeding the growing world in the long-term will only be possible if the way we produce and consume food is changed. Production and consumption of food is one of the major users of our planet's resources, and these resources, which we once considered as unlimited, are now clearly under increasing stress. Clean air and water, high quality land and soil, and the biodiversity and climate that support the whole food system, must be properly valued and used as efficiently as possible. It is for this reason that 'food' was highlighted as one of the three priority areas in the Commission's Roadmap to a Resource Efficient Europe alongside mobility and housing.

We are pleased to see that the Environmental Sustainability Vision for 2030 comes to similar conclusions with the strategic priorities of sustainable sourcing, resource efficiency along the food chain and sustainable consumption. One of the key priorities is also to tackle food waste – when food is wasted the resources that were invested into its production are also wasted.

Action by food and drink manufacturers alone is not enough. Food chain partners must work together to address food sustainability and tackle the adverse environmental impacts of food and drink products that occur all along the chain. A chief example is the multi-stakeholder initiative, the European Food Sustainable Consumption and Production Round Table, gathering European food chain partners, policymakers and civil society to collaborate on environmental sustainability for the first time.

The food industry should help in giving greater value to ecosystem services on which its industry itself depends. Maintaining biological diversity should be one of the main priorities as this is essential to sustainable food production.

While it is not a solution in itself, consumer information can play a major role. Consumers need to be aware of the environmental impacts of their choices and their own activities related to food, such as shopping and cooking. However, in order to be credible, consumer information must be scientifically reliable, understandable and not misleading. It is in the direct interest of the food sector so that those that really invest resources in improving their impacts are rewarded for their efforts; that they are not dismissed as "green washing". It is also clear that consumers should be increasingly informed via modern communication channels, such as smart phones applications and social media.

The European Food Sustainable Consumption and Production Round Table has been successful in working towards this objective by delivering a report on the use of communication tools for environmental information and developing the Envifood Protocol that should complement existing international standards. Now this good work has to be taken to the next step, and implemented in real actions on the ground that ensure consumers are given accurate information about the sustainability of the choices they make.

Due to the complexity of the food chain and food production, the social and economic aspects, such as dietary issues and international development, it is essential that all interested parties are involved in delivering holistic solutions. It is a positive aspect of the report that it starts this process, and the Commission will follow the same path when developing its Communication on Sustainable Food that will set out the long-term EU strategy for food.

Janez Potočnik
European Commissioner for the Environment

EXECUTIVE SUMMARY

To address the big challenges of securing smart, green growth on the path towards a greener economy both in Europe and globally, further efforts are needed to decouple economic growth from resource use and adverse impacts on the environment. Europe's food industry must ensure, also, that as it addresses these challenges, it does not compromise on food safety, quality, nutrition and health, while at the same time, satisfying consumer demand. To meet these objectives, FoodDrinkEurope's Environmental Sustainability Vision for 2030 includes a set of key actions detailing commitments across three core areas:

1. Sustainable sourcing;
2. Resource efficiency; and
3. Sustainable consumption and production.

Enclosed in this Report are a host of examples from industry players - large and small - which illustrate how Europe's food and drink industry is addressing environmental sustainability. FoodDrinkEurope members have highlighted key achievements on which the industry can continue to build its efforts, in a number of priority areas. Case studies and examples in each chapter demonstrate how food and drink companies of all sizes and individual sectors are striving to improve their environmental performance regardless of the multitude of different raw materials, products, processes, activities and local economic and environmental conditions that they face.

SUSTAINABLE SOURCING

Europe's food and drink industry purchases 70% of EU agricultural produce; it is thus crucial for the long-term health and prosperity of the industry that farming systems are sustainable and that biodiversity loss is prevented. Significant steps have been taken to improve the sustainable supply of key commodities with the development of many new initiatives and schemes in recent years, which, increasingly, adopt a more holistic approach to sustainability. Many companies are integrating sustainable sourcing into their overall business strategy, product design and corporate policy too.

ENERGY & CLIMATE CHANGE

Food and drink manufacturers have made significant investments to improve their energy performance and to reduce greenhouse gas emissions (GHG). Between 1999-2008, the industry cut its GHG emissions by 18% while production value increased by 29%. Increasingly, by-products and waste are used as a source of renewable energy and investments in low carbon technologies, such as Combined Heat and Power (CHP), are contributing to further emission reductions. The sector is also switching to alternative refrigerants as they become technically and economically viable, safe and energy efficient.

WATER

Europe's food and drink industry accounts for approximately 1.8% of Europe's total water use. In light of the anticipated increase in demand for water worldwide, significant efforts have been made to work with food chain partners to improve water management as well as waste water quality and water recovery and re-use. Food operators are also involved in various multi-stakeholder initiatives to address water use throughout the entire life-cycle of a product, in addition to water disclosure and voluntary water stewardship. Moreover, manufacturers have reduced water use on-site on a voluntary basis employing tools to measure water use, adopting water management practices and investing in water-efficient technology. As a result, the industry is achieving measurable water reduction and cost savings.

WASTE

Addressing waste and, in particular, food waste, is a top priority for the food sector given that when a food is wasted, the resources that were invested in its production are also wasted. At EU level, annual food waste is estimated at a total of 90 million tonnes. Manufacturers are constantly striving to use 100% of the agricultural resources they put into food production and are increasingly finding uses for by-products not only as food, but also as animal feed, fertilisers, cosmetics, lubricants and pharmaceuticals, amongst others. In addition, re-use, recycling and recovery by producing bioenergy from waste, are key methods for the industry to achieve optimal raw material utilisation and waste management. In addition, numerous food and drink companies are making commitments aiming for zero waste to landfill within the coming years.

PACKAGING

The food industry is increasingly using eco-design tools to optimise the environmental performance of products and packaging and is turning to reusable packaging solutions wherever environmentally beneficial and feasible. At the same time, packaging recycling rates have risen considerably over the past number of years. FoodDrinkEurope members have committed to producer responsibility recycling and recovery schemes in EU Member States where they have been introduced. In 2009, about 32 million tonnes of used packaging were recovered by these schemes in Europe. Manufacturers are working continuously with the packaging industry to develop innovative packaging materials with improved environmental impacts, while maintaining product protection and preservation.

TRANSPORT & DISTRIBUTION

Transport plays a vital role in the supply and distribution chains for Europe's food manufacturers. As a pillar of the EU economy, the food industry is an important user of different modes of transport, in particular, Heavy Goods Vehicles (HGV). The sector is actively seeking to enhance and reduce the adverse environmental impact of transport through collaboration with transport and distribution providers, to improve efficiencies in product sourcing, modal shifts, distribution networks, route planning and vehicle choice.

CONSUMERS

Food and drink products are a fundamental part of the daily lives of Europe's 500 million citizens, providing nutrition, health, well-being and enjoyment. As such, consumers are at the heart of how the food industry operates, in responding to ever-evolving consumer demand and lifestyles (pack sizes, smart packaging to preserve food for longer, etc.). Nonetheless, consumers generate significant direct environmental impacts in the way they transport, store, prepare and dispose of food and there is a need for scientifically-reliable and harmonised analyses setting out where improvements in the food chain, including at the household stage, can be made. A key achievement of the European food and drink industry is the development of a harmonised assessment methodology for the environmental impact of food and drink products, the Protocol for the Environmental Assessment of Food and Drink. This Protocol is a key deliverable of the **European Food Sustainable Consumption and Production (SCP) Round Table** and has been developed in collaboration with the European Commission and food chain partners, NGOs, academia and national experts. The Round Table has also developed recommendations on the use of tools for communicating environmental information, including to the consumer. The Recommendations highlight good practice and key tools that may be used to communicate environmental information, while recognising that to do so effectively, requires the use of a multi-pronged approach. Moreover, many food companies already provide voluntary information to consumers about the environmental performance of their products through various communication channels.

Challenges, environmental performance and future vision for 2030

The European food and drink industry will face significant challenges due to an expected global population of 8 billion by 2030. The figures outlined below highlight these challenges as well as the industry's environmental performance to date. This has enabled FoodDrinkEurope to identify a 2030 vision and actions for how the industry can take the lead to address environmental sustainability into the future.

Forecasts for 2030: The Challenges



50%

An increase of 50% in food supplies will be needed globally¹



50%

Global demand for energy is expected to increase by 50%²



40%

Global demand for water is expected to increase by 40%³



40%

Freight transport levels in the EU are expected to increase by 40% on those of 2005⁴

The European food and drink industry's environmental performance: State of play



5.3%

Food and drink manufacturers account for 5.3% of industrial final energy use globally⁵



18%

European food and drink manufacturers have cut their GHG emissions by 18% between 1999 and 2008, while increasing their production value by 29% over the same period⁶



1.8%

Food and drink manufacturers account for 1.8% of total water use in the EU⁷



5%

The food and drink industry accounts for 5% of overall food waste generated in the EU (Note: excluding agriculture)⁸



20%-30%

Food and drink products account for approximately 20-30% of the overall environmental impacts of consumption in the EU 27⁹

Vision

Leading the way to 2030

The European food and drink industry is a **responsible, constructive leader** in addressing **the economic, social and environmental pillars of sustainability with a life-cycle approach**.

The European food and drink industry is a **leader in the global transition towards a green economy through our commitment** to use low-carbon and resource efficient solutions as well as to promote sustainable patterns of production and consumption in partnership with stakeholders.

The food industry aims to **decouple growth from adverse environmental impacts and resource use** without compromising on food safety, quality, nutrition or health, whilst at the same time satisfying consumer demand.

In the area of sustainable sourcing, FoodDrinkEurope's members:

- Embed and promote sustainable sourcing in the supply chain and strive for a common understanding of the term with food chain partners and other stakeholders.
- Make a positive contribution to food security and environmental sustainability both within and beyond Europe.
- Identify and tackle environmental hotspots through continuous interaction and long-term contractual relationships with suppliers.

In the area of resource efficiency, FoodDrinkEurope's members:

- Promote life-cycle thinking in how they do business as food and drink manufacturers, and look beyond operations to improve resource efficiency along the food chain.
- Achieve more sustainable production methods using technological breakthroughs, increased R&D and innovation.
- Reduce waste and use natural resources more efficiently, not only as food producers but also as responsible and innovative managers of inputs for other industries.

In the area of sustainable consumption, FoodDrinkEurope's members:

- Enhance interaction with all stakeholders through new communication technologies, tools and channels. As a result, consumers are more environmentally aware and consider how food fits in with their values (e.g. health, sustainability, budget, lifestyle and social concerns) in a more holistic way.
- Ensure environmental sustainability considerations and life-cycle thinking are embedded in food and drink product designs.

Actions:

In order to implement the industry's Environmental Sustainability Vision for 2030, the European food and drink sector commits to take the following steps:

- FoodDrinkEurope will continue to actively engage in the **European Food Sustainable Consumption and Production Round Table** to promote the harmonisation of environmental assessment methodologies for food and drink products, facilitate the communication of environmental performance along the food chain, including to consumers, and identify priority research programmes and opportunities for technical innovation to support continuous environmental improvement along the supply chain.

Sustainable sourcing

- The industry will work with stakeholders, most notably, food chain partners, to **mainstream sustainable sourcing** by establishing guiding principles for sustainable sourcing, encouraging harmonisation and extending the coverage of certification schemes, facilitating sustainable sourcing for small and medium-sized enterprises (SMEs), and providing assistance to farmers for the uptake of sustainable sourcing.

Resource efficiency

- Reconciling agendas, such as the use of food crop-based fuels and other industrial uses of agricultural raw materials, is a key challenge at a time of population growth. The industry will engage with policymakers, food chain partners and other stakeholders to move towards **an integrated approach with particular attention on the availability of agricultural raw materials for the production of food and feed**.
- The industry will continue to **facilitate** exchange of **best practices** among operators, particularly among SMEs.
- The industry will **promote closed loop supply chains** and **work with supply chain partners** to improve environmental impacts along the chain.
- The industry will **encourage a common research and innovation agenda** to develop solutions to key environmental hotspots in our operations. Hotspots shall be addressed at the most appropriate level (e.g. European, sectoral, local, sub-sectoral, company level).
- The industry will initiate a food chain approach to address water impacts and support the development of a common **water toolkit**.
- The industry will work with food chain and other stakeholders, policymakers, retailers and consumer organisations, to reduce and, where possible, avoid food waste along the food chain.

Sustainable consumption

- The industry will look **beyond consumer information** and engage with government and stakeholders to facilitate increased awareness and public debate on sustainable consumption.
- The industry will engage with retailers and other stakeholders to **inform consumers about the impact of their diet on sustainability** and how it relates to their **lifestyle**.

Opportunities:

A number of key opportunities exist for Europe's food and drink industry across seven main areas, if the industry is to more fully tap into its potential for sustainable growth towards 2030. These are set out in the section below and overleaf.



Sourcing

- Design sustainable supply chains and ensure that ingredient crops are cultivated responsibly with particular attention to halting deforestation
- Mobilise public and private investment in agricultural productivity and yield growth
- Improve communication and transparency about certification scheme achievements at field level
- Providing technical assistance to farmers, especially smallholders, and advice on farming best practice
- Support ongoing efforts to improve collaboration, synergies and the establishment of common priorities between different biodiversity-related Conventions

Energy

- Share and encourage the spread of best practice and technology transfer, especially among SMEs
- Enhance focus, R&D, investment and cooperation among all stakeholders
- Improve commercial competitiveness of alternative energy sources, such as from by-products and waste
- Promote energy efficiency by public authorities, and incentives for businesses that apply resource efficiency measures

Water

- Further roll-out national, sector-wide and company guidance on good water management practices
- Call for economic incentives for water efficient eco-innovation and investment and water prices that reflect real costs in line with the EU Water Framework Directive
- Establish an internationally harmonised standard for assessing water impacts
- Fill data gaps on water availability, where water comes from, and whether good water management practices are used

Waste

- Call for support for research and innovation for new uses for by-products and food waste
- Launch joint campaigns and a toolkit for tackling food waste along the food chain
- Work with supply chain partners to maximise resource efficiency
- Identify opportunities to centralise by-product utilisation (e.g. centralise biogas production from food and drink facility by-products in a given area)

Opportunities:



Packaging

- Roll-out R&D and innovation in lightweight materials, biodegradable materials, materials' reduction, recyclability and recoverability, as well as for bio-based materials
- Cooperate with other stakeholders to prevent packaging waste through the promotion of re-use, recycling and recovery
- Share best practice packaging waste management with national recycling and recovery programmes
- Call on policymakers to improve reporting procedures in Member States and data quality
- Ensure sufficient investment by public authorities in recycling and recovery infrastructures

Transport

- Increase cooperation with transport and logistics operators to optimise loading rates and increase back-hauling
- Improve availability of alternative fuels and rail networks
- Prioritise rail and water-based transport (where feasible) and optimise from a life-cycle perspective
- Widen delivery windows to retailers to avoid peak commuting hours
- Improve vehicle design and the use of technology for optimal route planning

Consumers

- Work with stakeholders to help avoid food waste at every stage of the value chain, particularly at the household level
- Optimise packaging and ensure commercial viability of technological innovations that could help reduce food waste
- Roll-out joint, multi-faceted consumer communications and campaigns to promote sustainable consumption
- Enhance collaboration between food banks, food and drink manufacturers, logistics operators and retailers to redirect surplus food to the needy

Conclusion

The food and drink industry, being uniquely dependent on ecosystem services that determine the availability and quality of our raw materials, is committed to decoupling growth from adverse environmental impacts and resource use without compromising food safety, quality, nutrition and health, whilst satisfying consumer demand. To meet this commitment, the strategic priorities the FoodDrinkEurope set out for Environmental Sustainability by 2030 cover the following areas:

(i) sustainable sourcing, (ii) resource efficiency along the food chain, and (iii) sustainable consumption and production.

The case studies and examples in this report illustrate how many companies and food industry sectors are striving to improve their overall environmental performance. This publication shows that there is no 'one-size fits all' solution to improving the environmental sustainability of Europe's food and drink industry, given the diversity and complexity of the industry itself, and of the food chain. Yet, it also demonstrates how food and drink companies from all parts of the industry are able to contribute to environmental improvement regardless of the multitude of different raw materials, products, processes, activities and local economic and environmental conditions. In this context, it would be inappropriate to use the practices mentioned in this report as benchmarks for the entire industry or for specific sectors. Nonetheless, we hope that the examples will be a source of inspiration for other food and drink companies and players along the food chain, in their efforts to promote sustainable growth.

Finally, as this report shows, sustainable consumption and production of food and drink products requires a 'whole-of-society' effort; to contribute to this, the European food and drink industry is working on numerous initiatives with different stakeholders, most notably, though the work of the **European Food Sustainable Consumption and Production Round Table**. In this case, and indeed many others, we hope that by collaborating closely with food chain partners and other stakeholders, we can upscale our efforts and ensure the long-term duration of our achievements towards smart, green growth.

As a key player in the food chain helping to improve the food industry's sustainable business practices, we look forward to continuing this work, using a life-cycle approach in order to achieve the 2030 Environmental Sustainability Vision of an industry that is a responsible, constructive leader in addressing the economic, social and environmental pillars of sustainability needed to achieve a global green economy.

Reflections of stakeholders



"The European Food and Drink Industry in 2030 must be an example to the rest of the world on how to provide safe, nutritious and high quality food and drink for the European market in a sustainable and resource-efficient way. The industry must realise that a life-cycle approach to the food supply chain right through to the action of the consumer is the only way to tackle the 40% of food wasted in today's food supply chains. While the need to produce enough food for 9 billion people in 2050 is real, this does not mean that the sector should follow a path to high input, intensive production. Incentives for an integrated and sustainable production model must be provided by the industry and sustainability rewarded by the market and the consumer. Within the context of changing climate, rising population and changing global tastes, I welcome FoodDrinkEurope's 2030 vision in which resource efficiency and the role of consumption is included to ensure that the food and drink industry in Europe leads the way toward more sustainable food systems."

James Lomax,
Agri-Food Programme Officer, United Nations Environment Programme



"Resource efficiency is everyone's business. It is a key issue for the food industry as we face the challenge of meeting global food demand in an era of increasingly scarce resources, be it land, water and other key ingredients in the food supply chain. It makes environmental and economic sense to address these long-term issues while there is still time, so I welcome very much the engagement of the food industry in looking to solve these big challenges with initiatives today. FoodDrinkEurope is engaged in the European Food Sustainable Production and Consumption Round Table. It makes perfect sense that the industry plays a key role in this initiative, which can and must deliver results. Tackling the issue of supply is only one aspect, we must also look at demand issues, including promoting food choices which lead to positive health outcomes for citizens. These are complex questions but again the food industry has a part to play, including helping to tackle the enormous levels of food waste. Establishing long-term relationships with suppliers based on sustainability and fairness criteria is also important."

Mairead McGuinness
Member of the European Parliament



"Tackling food waste is absolutely critical to any resource efficiency and security strategy. Wasted food is an obvious waste of resources (inputs), water, energy and nutrition. Current estimates suggest that around 30% of the food grown globally is wasted, equating to some 1.3 billion tonnes of food a year. Tackling this food waste would make a major contribution to the need to make 70% more food available by 2050, to ensure future food security. In fact, it would reduce the food required by 2050 by an amount approximately equal to 25% of today's global food production. So food and drink manufacturers must continue to "do their bit". Increasingly this will mean more collaboration, more innovation and more active engagement with farmers, growers, retailers and consumers, in order to create the sort of paradigm shifts required to make the transition to a resilient, low carbon and resource efficient food chain."

Mark Barthel,
Special Adviser and Head of Design, WRAP (Waste & Resources Action Programme), UK



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