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2013 was another busy and active year for FoodDrinkEurope. We focused on our priorities in the areas of health and nutrition, safety, science, environmental sustainability, competitiveness and dialogue with our social partners and I am really pleased to see the progress made on all of these fronts. 2013 was also a year of strengthening the partnerships we have established with our stakeholders, both up and downstream; these partnerships are an important driving force for the growth of the industry.

This Annual Report gives a flavour of the organisation’s activities over the past year, guided by our active and dedicated members who help make FoodDrinkEurope the point of reference for Europe’s food and drink industry.

In spite of the continuing negative economical climate in the EU in 2013, our industry successfully maintained the characteristics of a stable and robust manufacturing sector. Europe’s food and drink industry is the biggest manufacturing sector in the EU both in terms of turnover and employment, as well as the direct employer of some 4.25 million people. Our industry certainly is a resilient pillar of the European economy!

We are a local industry, the most important partner of Europe’s rural areas and rural communities, using 70% of agricultural raw materials produced in the EU. We provide a diverse variety of safe and affordable foods to European consumers, and also to consumers in many other parts of the world.

Europe’s food and drink industry is faced with ever increasing challenges, not only inside Europe but also on the world stage. We must continue to pay attention to important aspects of our business such as Corporate Responsibility, producing sustainably and reducing waste. At the same time, we must become more actively engaged in the discussions around sustainable food, health and nutrition, and highlight better all the efforts the industry is making in these fields.

Only by increasing the transparency of what we do, can we slowly but surely, build trust in our industry; we must engage positively in dialogue and meaningful discussions in order to serve consumers by providing food and drink products of the highest quality that are produced in a sustainable way.

Jesús Serafín Pérez
President
Achieving Results

2013 has certainly been another eventful and memorable year. A number of things stand out in particular, which you will have the opportunity to read about in more detail in this Report. We have worked hard on all the major issues that have an impact on our industry for each of our key pillars, namely: food policy and science, consumer information, diet and health, competitiveness and environment.

Throughout the year, we published several guidance reports, including our Guidance on Food Allergen Management, with the aim of harmonising and disseminating good practice across the European food industry at all levels. We also produced, gathered and published data which is referred to and used by many different stakeholders, further enhancing the position of FoodDrinkEurope as a trusted and relevant source of information. These reports include ‘Data & Trends’, ‘Competitiveness Report’, ‘Priorities for the Irish Presidency of the Council of the EU’ and ‘Priorities for the Lithuanian Presidency of the Council of the EU’.

2013 was also an important year for our work in consumer health and wellbeing. In September, together with Eurocommerce, we published our Guidance on the Provision of Food Information to Consumers which was very well received both by our members and by external stakeholders. We continued to be an active member of the EU Platform for Action on Diet, Physical Activity and Health, underlining the collaborative and voluntary approach of the industry in promoting balanced diets and healthy lifestyles.

In June, together with representatives from across Europe’s food supply chain, we launched our Joint Declaration on Food Wastage entitled, ‘Every Crumb Counts’. What began with just six signatory organisations quickly grew to 17 and we have ambitious plans to build on this momentum and secure new signatories in the future. The food wastage declaration attracted immense media attention and was reported as far afield as Australia, the USA and Asia.

September 2013 saw the launch of The Supply Chain Initiative. This important joint effort shows the commitment of our industry, together with our food chain partners, to fairer commercial practices along the food supply chain, leading to greater accountability and transparency for all. As with any such initiative, the proof of its effectiveness is in its implementation; we look forward to witnessing the application of the voluntary Framework in the months to come and we strongly encourage those who have not yet signed up, to do so.

We have had continuing close and very fruitful cooperation with our social partner EFFAT this past year. In May, we issued a joint position paper against discriminatory food taxes, and in November we published together the findings of a major research project we carried out on employment and skills in the food sector.
2013 was an important year in the world of international trade and I’m pleased to say that FoodDrinkEurope was vocal and visible on each set of negotiations. We issued statements on the G8 Summit in June, the EU-USA trade deal (TTIP), the EU Canada agreement (CETA) as well as on ongoing negotiations with Japan and India. We participated in debates in the European Parliament, the Commission and elsewhere on important negotiations, both multi and bi-lateral. Our constant visibility on these issues attracted the attention of some major news agencies.

Our media profile this year was higher than ever. We have strengthened our relations with traditional media, embraced new media tools and now have a substantial presence on social media, and in particular on Twitter. We are ensuring an ever more active presence, participating increasingly as speakers in conferences and events around Europe and abroad.

While we faced many challenges in 2013, in particular to the reputation of our industry, one of the positive outcomes was that this has underlined the fact that FoodDrinkEurope is seen very clearly as the ‘go to’ body representing the food and drink industry in Europe.

This brief introduction is but the tip of the iceberg! Please read on to discover a more complete account of our activities in 2013.

I would like to take this opportunity to say “thank you” to our members for their support and important contributions to our work and activities. Their expertise, their commitment and their dedication are the cornerstone of our organization.

And, need I add that none of this would be possible, of course, without the great team that works so diligently to keep it all up and running. No two days are the same; each issue brings its challenges, and my colleagues step up each time with professionalism, enthusiasm and that all-important good will! Thank you to my colleagues for all their hard work and for proving every day the power of ‘team work’.

Mella Frewen
Director General
The mission of FoodDrinkEurope is to promote the creation of an environment in which all food and drink companies, whatever their size, can meet changing consumer demands while competing for smart, sustainable and inclusive growth.

FoodDrinkEurope’s work is based on sound scientific research, robust data management and effective communication, working within the regulatory framework to ensure that all food and drink policy issues are dealt with in a holistic manner. The organisation promotes members’ interests in areas such as food safety and quality, nutrition and health, consumer trust and choice, competitiveness, research and development, innovation and environmental sustainability. FoodDrinkEurope’s work also consists of working closely with many groups of key stakeholders to address the range of complex socio-economic and environmental challenges that the industry is facing.

FoodDrinkEurope seeks to enhance and promote the long-standing tradition of quality and variety that has been vital in gaining Europe’s food and drink industry the world-class recognition that it enjoys today. By combining Europe’s food and drink heritage with world-class innovation for the future, FoodDrinkEurope and its members aim to strengthen the industry’s global competitive position in continuing to serve consumers’ needs by providing safe, nutritious, affordable food and drink products produced in a sustainable way. FoodDrinkEurope also aims to enhance consumer trust in Europe’s food and drink industry and create wider recognition of its important contribution to the daily lives of consumers across the EU.
2013: a year in review

January 2013
► Publication of the ‘Priorities for the Irish Presidency of the Council of the EU’ brochure
► FoodDrinkEurope publishes position on the Commission’s proposal on biofuels
► The European Food Sustainable Consumption and Production (SCP) Round Table: Call for Pilot Testing Volunteers

February 2013
► Publication of Guidance on Food Allergen Management
► Food and drink business operators call for non-distortive POs/IBOs in CAP reform
► Europe’s food industry regrets cut to R&I spending in new EU budget
► Reaction to announcement on US free trade negotiations

March 2013
► FoodDrinkEurope welcomes launch of EU-Japan FTA talks
► World Water Day: Food & drink industry’s commitment to sustainability

April 2013
► World Health Day: Europe’s food industry reaffirms efforts to encourage healthier diets
► Europe’s food operators welcome EU Single Market for Green Products
► Call for an enhanced engagement with India towards an ambitious trade deal

May 2013
► Food taxes rejected in favour of comprehensive approach to obesity
► Joint EFFAT-FoodDrinkEurope Position on Discriminatory Food Taxes
► FoodDrinkEurope urges EU leaders to support VAT anti-Fraud Package

June 2013
► World Environment Day: Europe’s food industry steps up efforts to tackle food waste
► G8: Europe’s food manufacturers welcome push for trade agreements
► Europe’s food manufacturers welcome EU-USA trade talks
► Launch of ‘Every Crumb Counts’, the Joint Declaration to tackle food wastage
► FoodDrinkEurope welcomes conclusion of CAP reform negotiations
July 2013
► Publication of the ‘Priorities for the Lithuanian Presidency of the Council of the EU’ brochure

September 2013
► Publication of Guidance for food business operators on EU labelling rules
► Launch of The Supply Chain Initiative: Together for good trading practices

October 2013
► World Food Day 2013: Europe’s food manufacturers working towards more sustainable food systems
► Europe’s food and drink manufacturers welcome milestone in EU-Canada trade talks

November 2013
► EFFAT and FoodDrinkEurope publish a major research project on employment and skills in the food and drink manufacturing and processing sector
► Copa-Cogeca and FoodDrinkEurope support on-going negotiations on the proposed EU-US Transatlantic Trade and Investment Partnership (TTIP) agreement
► European agri-food chain representatives reaffirm support for EU-Japan deal at Tokyo Summit

December 2013
► The European Food Sustainable Consumption and Production (SCP) Round Table adopts the ENVIFOOD Protocol to assess environmental impact of food
► FoodDrinkEurope welcomes conclusion of Horizon 2020
► FoodDrinkEurope welcomes European Commission’s proposal to reform EU promotion policy
► European SME Week: Small and Medium-sized food and drink companies driving growth in Europe
► Publication of 2013-2014 Competitiveness report
► Bali Ministerial Conference: Europe’s food manufacturers call for successful and balanced trade deal
► FoodDrinkEurope welcomes Commission report on origin labelling for meat used as an ingredient
► Novel Foods Regulation: FoodDrinkEurope calls for a clear framework to facilitate innovation
Food and drink industry figures

**Turnover**
- €1,048 billion (3.1% increase compared to 2011)
- Largest manufacturing sector in the EU (14.6%)

**Employment**
- 4.2 million people (0.4% increase compared to 2011)
- Leading employer in the EU (15.5%)

**Number of companies**
- 286,000

**SMEs**
- 51.6% of food and drink turnover
- 64.3% of food and drink sector employment

**Consumption**
- 14.6% (% of household expenditure on food & drink)

**Value added**
- 1.9% (% of EU GDP)

**External trade**
- €86.2 billion exports (13.2% increase compared to 2011)
- €63.2 billion imports (0.4% increase compared to 2011)
- €23 billion trade balance
  - Net exporter of food and drink products

**EU market share of global exports**
- 16.1% (20.5% in 2002)
  - Shrinking share in global markets

**R&D**
- 0.3% (% of food and drink production)

Source: Eurostat, UN COMTRADE, OECD
Food Safety Management
Throughout 2013, FoodDrinkEurope continued its efforts to encourage the highest standards of food safety among Europe’s food manufacturers, producing new tools to assist its members in this regard.

FoodDrinkEurope also engaged with MEPs on important dossiers such as the Official Food & Feed Controls Regulation. FoodDrinkEurope established a strong position which enabled fruitful discussions with key MEPs and led to suitable amendments to the draft proposal from the European Commission. Other important dossiers included the Revision of Hygiene legislation for frozen food and the Parliament’s non-legislative food fraud report.

Guidance on Food Allergen Management
In February 2013, FoodDrinkEurope published the Guidance on Food Allergen Management for Food Manufacturers and promoted it to members. The first of its kind, this document sets out general principles to manage specific pre-packed foods causing allergies or certain intolerances and provides sound, evidence-based, consistent information on good practice in risk management of allergenic foods for food producers.

FoodDrinkEurope also contributed to the European Food Safety Authority (EFSA) public consultation on a draft scientific and technical guidance for the preparation and presentation of applications that relate to labelling ingredients (pursuant to article 6(11) of directive 2000/13/EC) and to the preparation of allergen dossiers.

In 2014, FoodDrinkEurope will be organising a quantitative risk assessment on allergens to further develop the important work that is being undertaken for this dossier.

**Process Contaminants**

In 2013, FoodDrinkEurope finalised its most recent update of its Acrylamide Toolbox which takes into account the latest scientific and technological developments. The FoodDrinkEurope Acrylamide Toolbox has for several years been an invaluable resource for food and drink manufacturers worldwide that want to identify the best ways to reduce acrylamide in their products. This is the 13th update of the toolbox which has been revised on a continuous basis as the science progresses.

FoodDrinkEurope also submitted acrylamide occurrence data to EFSA for the preparation of an opinion on the safety of the substance.

**Regulatory Fitness and Performance Programme (REFIT)**

FoodDrinkEurope contributed actively to the content of the European Commission Communication on EU Regulatory Fitness with a view to examining the functioning of the general food law. This regulatory fitness check will help simplify existing legislation and reduce administrative burdens for the 286,000 food and drink companies in Europe, an overwhelming majority of which are SMEs.

**Research and Innovation**

FoodDrinkEurope worked proactively throughout 2013 to help food and drink manufacturers overcome obstacles to innovation, the cornerstone for future growth and competitiveness in Europe. This involved direct engagement with the EU institutions and partnerships with other stakeholders. In addition, FoodDrinkEurope contributed to the Horizon 2020 budget discussions. Of the €80 billion overall budget for Horizon 2020, approximately €3.8 billion was allocated to the theme of ‘Food security, sustainable agriculture and forestry, marine, maritime and inland water research and the Bioeconomy’. In a statement, FoodDrinkEurope expressed regret that this amount was regrettably smaller than anticipated; it will nevertheless be of crucial importance to Europe’s food and drink manufacturers.

In 2013, FoodDrinkEurope was also actively involved in several funding instruments that compliment Horizon 2020, such as ‘Prometheus’ and ‘Trafoon’, two key research and development projects. FoodDrinkEurope contributed to the strategic agenda of both projects.

3 PROMETHEUS: ‘Process contaminants: Mitigation and Elimination Techniques for High food quality and their Evaluation Using Sensors & Simulation’ – a research and development project with relevance for process contaminants policy development

4 TRAFOON: ‘Traditional Food Network to improve the transfer of knowledge for innovation’ is a 3 year project coordinated by the University of Hohenheim, Life Sciences Center (Germany)
Additionally, FoodDrinkEurope was selected to be part of the European Commission’s Bioeconomy Panel⁵. This is a platform for informed discussions on the bioeconomy and is composed of 30 experts who represent a wide variety of interests.

**European Technology Platform (ETP) ‘Food for Life’**

In 2013, the European Technology Platform (ETP) ‘Food for Life’ (managed by the FoodDrinkEurope secretariat) continued presenting research and innovation opportunities and improving the transfer and share of knowledge (particularly to SMEs) across the food and drink industry in Europe. Throughout 2013, the ETP promoted the content of its updated ‘Strategic Research & Innovation Agenda’⁶ which was published in 2012.

2013 was a very important year for the ETP ‘Food for Life’ which successfully passed through a process of evaluation and which was, once again, recognised as a European Technology Platform by the European Commission, now under the rules of the new ‘Strategy For European Technology Platforms: ETP 2020’. This is an important step for the ETP and for the ‘Food for Life’ team, which is committed to contributing to the competitiveness of the food and drink sector and to Europe’s economic growth.

**Joint Programming Initiatives**

FoodDrinkEurope held the chair and vice chairs of expert groups in several of the European Commission’s Joint Programming Initiatives (JPIs), such as ‘Healthy Diet for a Healthy Life’, ‘Agriculture, Food Security and Climate Change’⁸ and ‘Sustainable Food Production and Consumption’⁹. The JPIs were established to pool national research efforts to make better use of Europe’s precious public research and innovation resources and to tackle common European challenges more effectively.

**Nanotechnology**

In 2013, FoodDrinkEurope contributed to ongoing efforts at EU level and to JRC (Joint Research Center) surveys on the revision of the definition of nanotechnology for food uses. FoodDrinkEurope worked with key stakeholders to ensure that any proposed changes in the definition will not result in confusion for the consumer.

**Novel Foods Regulation**

In December 2013, FoodDrinkEurope took note of the proposal for the revision of the Novel Foods regulation, following the failure to reach an agreement in 2011. FoodDrinkEurope expects that this proposal will contribute to research and innovation in order to ensure sustainable growth and employment and help bring new and improved products to market.

**Honey Directive**

FoodDrinkEurope contributed significantly to the revision of the Honey Directive and engaged actively with the European Parliament and the Commission. In particular, FoodDrinkEurope’s efforts were focused on ensuring that the Directive clarifies the true nature of pollen as a constituent of honey.

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⁵ http://ec.europa.eu/research/bioeconomy/policy/panel_en.htm
⁷ https://www.healthydietforhealthylife.eu/
⁸ http://www.faccejpi.com/
⁹ https://www.susfood-era.net/home
In December 2013, FoodDrinkEurope launched its 2013-2014 Competitiveness Report\textsuperscript{10}, urging EU institutions to deliver an industrial policy tailored to increase the competitiveness of the food and drink sector.

FoodDrinkEurope’s report, entitled ‘Promoting an EU Industrial Policy for Food and Drink’ presented the latest economic performance figures of the EU food and drink industry and demonstrated clearly that it is a stable, resilient and robust manufacturing sector.

The purpose of this report was to highlight that the EU food and drink industry continues to generate the largest percentage of EU GDP, ahead of other important sectors such as engineering, automobile and chemicals, and, on the other hand, to show that the industry is striving to keep pace with international competition in terms of export market shares, private R&D investment and labour productivity.

\textsuperscript{10} \url{http://www.fooddrinkeurope.eu/S=0/publication/competitiveness-report-promoting-an-eu-industrial-policy-for-food-and-drink/}
High Level Forum for a Better Functioning Food Supply Chain

Throughout 2013, FoodDrinkEurope participated actively in the High Level Forum (HLF), which brings together stakeholders from across the food chain as well as representatives from 21 EU Member States to assist the European Commission in implementing the 30 Recommendations of the High Level Group (HLG) on the Competitiveness of the Agro-Food Industry, and to develop an integrated EU industrial policy for food and drink.

In addition to the many important efforts already undertaken within this Forum, FoodDrinkEurope’s work in 2013 focussed on five key issues, crucial to the implementation of the EU 2020 Strategy for smart, sustainable and inclusive growth. These include: (i) the Regulatory Fitness and Performance Programme (rEFiT)\(^\text{11}\), (ii) Environmental policy & Sustainability, (iii) B2B relations along the food supply chain, (iv) International Trade, and (v) Employment.

The Supply Chain Initiative

In September 2013, FoodDrinkEurope, working together with seven other EU associations representing the food supply chain\(^\text{12}\), launched ‘The Supply Chain Initiative’\(^\text{13}\) with the aim of ensuring fairness in commercial relations along the food supply chain.

By the last quarter of 2013, 19 companies had signed up to The Supply Chain Initiative and 79 companies/groups from across the EU have thus far expressed their intention to register. In addition, tools are being developed to encourage and monitor the establishment of national dialogue platforms in all EU Member States, with countries such as Belgium, Germany and the Netherlands having already established such platforms.

The Governance Group of ‘The Supply Chain Initiative’, which is co-chaired by FoodDrinkEurope, coordinated the work of this initiative to monitor the application of the principles of good business practice and to assist in the interpretation of the guiding principles. It can also offer a means to resolve disputes arising in a case of non-compliance.

Bilateral Trade Relations

The European food and drink industry is the largest global food and drink exporter in the world; exports amounted to €86.2 billion in 2012.

Over the course of 2013, FoodDrinkEurope welcomed the launch of free trade agreements with the United States and Japan, the political agreement reached on the key elements of a Comprehensive Economic and Trade Agreement (CETA) with Canada, and called for enhanced engagement with India towards an ambitious trade deal. In relation to the United States, FoodDrinkEurope welcomed the launch of the Transatlantic Trade and Investment Partnership (TTIP) negotiations in June 2013. FoodDrinkEurope collaborated with other European agri-food chain organisations and released a joint statement calling on negotiators to resolve non-tariff measures in the TTIP negotiations\(^\text{14}\).

\(^{11}\) http://ec.europa.eu/smart-regulation/refit/index_en.htm
\(^{12}\) The associations involved in this Initiative are: the food and drink manufacturing industry (FoodDrinkEurope), the branded goods manufacturers (AIM), the retail sector (the European Retail Round Table (ERRT), EuroCommerce, EuroCoop and The Union of Groups of Independent Retailers of Europe (UGAL)), and agricultural traders (CELCAA).
\(^{13}\) http://www.supplychaininitiative.eu/
FoodDrinkEurope took part in meetings with the EU’s Chief Negotiator on TTIP and various cabinets of European commissioners. In relation to Japan, FoodDrinkEurope proactively collaborated with other stakeholders, leading to joint statements in November 2013, reaffirming the strong support for a deep and comprehensive FTA between the EU and Japan.

In October 2013, FoodDrinkEurope participated in the WTO Public Forum and met with key staff of the WTO Secretariat and several delegations to convey the industry position ahead of the 9th WTO Ministerial Conference held in Bali in December 2013.

Small and Medium-sized food and drink companies
One of FoodDrinkEurope’s key priorities, throughout 2013, was to develop the competitiveness of Europe’s food and drink SMEs by placing a special emphasis on their specific needs and ensuring a better regulatory framework. FoodDrinkEurope has been tracking the application of the Small Business Act (SBA) and targeting actions on behalf of SMEs.

Reform of the Common Agricultural Policy
During the first semester of 2013, FoodDrinkEurope proactively communicated the industry’s views on various elements of CAP reform, such as the application of competition rules in the agricultural sector and the importance of achieving a market-driven CAP, through contacts with MEPs and other partners from the food chain. FoodDrinkEurope welcomed the timely conclusion of the triilogue negotiations in June 2013, as Europe’s food and drink industry needs access to a secure and adequate supply of high quality agricultural raw materials.

Promotion Policy for EU agri-food products
FoodDrinkEurope warmly welcomed the Commission’s proposal, in November 2013, to reform the promotion policy for EU agricultural and food products and shared the Commission’s assessment that this policy is an important tool for contributing to the competitiveness of the agri-food sector. FoodDrinkEurope particularly supported the focus on promotion programmes in third countries and the extension of eligible product criteria to certain food products. Together with key users of promotion programmes, FoodDrinkEurope asked for a timely approval of the reform of this policy.

Biofuels
Throughout 2013, FoodDrinkEurope followed closely the debate on the Commission’s proposal to amend the Renewable Energy Directive (RED) and the Fuel Quality Directive (FQD), which was published in October 2012. FoodDrinkEurope welcomed the proposal as it foresees a capping on food-based biofuels and support for advanced biofuels that do not compete with food. FoodDrinkEurope provided input to the Council and European Parliament discussions, where appropriate, in order to promote the ‘food and feed first’ approach.

17 CEFS (Comité Européen des Fabricants de Sucre) does not support the position of FoodDrinkEurope. ANIA (Association National des Industries Alimentaires) did not reach a consensus on this position.
Industry’s commitment to help consumers make healthier choices

Encouraging consumers to adopt healthier lifestyles through a balanced diet and more physical activity is a major challenge for society as a whole. Europe’s food and drink manufacturers recognise that they have an important role to play in encouraging better diets and healthier lifestyles. In June 2013, the evaluation report of the EU Strategy on Nutrition, Overweight and Obesity Related Issues18 acknowledged the importance of stakeholder actions in the EU Platform for Action on Diet, Physical Activity and Health19 to help in addressing obesity.

Throughout 2013, Europe’s food and drink manufacturers reaffirmed their commitment to improving healthy eating choices for consumers by being a major contributor to the EU Platform for Action on Diet, Physical Activity and Health, accounting for almost 50% of all commitments made.

A founding member of the Platform, FoodDrinkEurope and its members have developed, supported and encouraged initiatives and commitments, aimed, for instance, at providing the consumer with more choice and availability through the launch of different portion sizes and enhanced product compositions, providing clear consumer information and responsible marketing, and promoting healthier lifestyles, and this work is on-going. FoodDrinkEurope is also working on improving the monitoring of such efforts by the food and drink industry.

19 http://ec.europa.eu/health/nutrition_physical_activity/platform/index_en.htm
In 2013, FoodDrinkEurope members continued to successfully implement their commitment to consistent and harmonised nutrition labelling on the front of the pack of food and drink products by means of voluntary Guideline Daily Amount (GDA)/Reference Intake (RI) labelling, which has been adopted by many companies throughout the EU and beyond.

FoodDrinkEurope is also taking part in the EU funded NU-AGE project, which studies the specific dietary needs of healthy ageing. In 2013, FoodDrinkEurope worked towards the implementation of the project20, delivering information on current EU legislation on food-related issues, diet and health, which will feed into scientific research and policy recommendations that address the specific dietary needs of an ever increasing elderly population.

**Providing food information to consumers**

In 2013, the European food and drink industry was active in preparing for the new labelling rules, due to enter into force in 13 December 2014, when the new Food Information to Consumers Regulation21 will become applicable.

In this context, FoodDrinkEurope, together with EuroCommerce22, launched in September 2013 a comprehensive Guidance brochure23 to help facilitate a common understanding between European manufacturers and retailers on the requirements of EU labelling rules which will enter into force in 201424. In order to help companies better understand the Regulation’s requirements, FoodDrinkEurope also participated in various events on food labelling all across Europe, raising awareness at various levels, and provided further assistance to its members in preparing for the label changes.

During 2013, FoodDrinkEurope also provided input into stakeholder consultations and participated in debates concerning country of origin labelling. The industry’s engagement will continue in 2014, when new stakeholder consultations will be organised in view of the adoption of other implementing measures foreseen by the Regulation.

At a global level, in 2013 FoodDrinkEurope continued its involvement in the work of Codex Alimentarius, providing technical contributions to the discussions related to harmonisation of food labelling standards.

**Nutrition and health claims**

Further to the establishment of an EU-wide list of approved health claims on foods25 in December 2012, several additional health claims were also authorised in 2013. FoodDrinkEurope continued to follow closely the implementation of authorised health claims in the European market.

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22 EuroCommerce is the representative body at EU level for retailers, wholesalers and other trading companies.
24 Regulation (EU) 1169/2011 on the provision of food information to consumers enters into force on 13 December 2014.
Every Crumb Counts: Joint Food Wastage Initiative

In June 2013, representatives from across Europe’s food supply chain announced the launch of a joint effort to tackle the major societal problem of food wastage via the publication of their Joint Declaration entitled, ‘Every Crumb Counts’. This was the culmination of the work undertaken by a dedicated FoodDrinkEurope Task Force on food wastage.

The purpose of this joint initiative is to raise awareness and shape EU level policy on food wastage and to engage with stakeholders to take further action to prevent and reduce edible food wastage. By adopting the Joint Declaration, FoodDrinkEurope’s objective is to set a benchmark in the fight against food wastage and to contribute towards the EU’s goal for a more sustainable food supply chain. The Declaration has thus far gained the political support of UNEP/FAO ThinkEatSave campaign, WRAP and Wageningen University.

The Joint Initiative was launched at an event in Brussels on 25 June 2013 in the presence of distinguished speakers. A dedicated website was created, together with an online industry toolkit, to help food manufacturers maximise their food resources. The initiative, by the end of 2013, achieved a significant response from stakeholders, reaching a total of 17 co-signers and 4 supporters in 3 months. FoodDrinkEurope is now seen as a significant partner in EU and global policy developments with key recommendations being reflected in the EU Food Sustainability consultation and well-received by the EU policymakers.

For its work in spearheading this initiative, FoodDrinkEurope was shortlisted for the European Placing sustainable growth at the heart of business


[27] http://www.fooddrinkeurope.eu/industry-in-focus/maximizing-food-resources/
Public Affairs ‘Trade Association of the Year Award’, marking a significant achievement for FoodDrinkEurope and its members.

**Resource Efficiency**
Throughout 2013, FoodDrinkEurope worked closely with partners under the multi-stakeholder initiative, the European Food Sustainable Consumption and Production (SCP) Round Table. The Round Table\(^{28}\), co-chaired by the Commission and food chain partners, adopted the Guiding Principles and reports on voluntary environmental communication tools, on non-environmental aspects of sustainability and on continuous environmental improvement.

Following on from the public consultation and pilot testing of the EnViFOOD protocol\(^{29}\), which is a harmonised framework methodology to assess the environmental impact of food and drink products, the Round Table will adopt on 20 January 2014 the final methodology. This sector methodology lays the ground for the upcoming Commission Environmental Footprint methodology pilots for food and drink products to be launched in February 2014.

**Food Sustainability**
FoodDrinkEurope worked closely with members to proactively contribute to the food sustainability debate in anticipation of the Commission Communication on the Sustainability of Food Systems.

These efforts led to the establishment of a High Level Forum voluntary stakeholder group on food sustainability which includes various partners from across the food supply chain. FoodDrinkEurope will continue to work towards a long term strategic approach to food sustainability encompassing the three pillars of sustainability (social, economic, and environmental).

**Packaging and Packaging Waste**
In 2013, the European food and drink industry worked towards optimising packaging usage throughout the product life-cycle so as to minimise adverse impacts on the environment, whilst ensuring that the positive role in terms of helping to ensure food safety and quality, is maintained\(^{30}\).

In the context of implementing the Roadmap for a Resource Efficient Europe, the European Commission has been preparing a revision of the EU Waste Acquis, including the Waste Framework Directive and the Packaging and Packaging Waste Directive. FoodDrinkEurope welcomed this ambition and proactively provided expert input to revision processes, throughout 2013.

**Climate and Energy Policy**
FoodDrinkEurope called upon governments gathered at COP 19\(^{31}\) in November 2013, to deliver an ambitious, binding international agreement to address climate change and food security, and provide incentives for investment while guaranteeing legal certainty for food and drink companies. Food and drink manufacturers seek a long-term legal framework which will encourage investment in the industry.

FoodDrinkEurope actively contributed with its expertise to the elaboration of the revised Fluorinated Gases Regulation, finally agreed by the European Parliament and Council on 18 December 2013. FoodDrinkEurope welcomed the final outcome which aims to phase down fluorinated gases in refrigeration equipment instead of introducing an immediate ban.

\(^{28}\) http://www.food-scp.eu/


\(^{30}\) FoodDrinkEurope. Environmental sustainability vision towards 2030. Achievements, Challenges and Opportunities, June 2012

\(^{31}\) 19th session of the Conference of the Parties to the UNFCCC (COP 19), in Warsaw, November 2013
In January 2012, FoodDrinkEurope started a formal Social Dialogue with the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT) following a Recommendation adopted in 2009 by the High Level Group for the Competitiveness of the Agro Food Industry. Over the past two years, this Social Dialogue has successfully produced joint statements aimed at the Commission on Solvency II, reform of the Common Agricultural Policy (CAP) and discriminatory food taxes and has also commissioned a major research report on the sector funded by the European Commission.

‘Ensuring sustainable employment and competitiveness in the EU Food and Drink Sector: Meeting the challenges of the labour market’

In January 2013, FoodDrinkEurope and EFFAT launched this Commission-funded project to undertake labour market research on the food and drink manufacturing and processing (FDMP) sector across the European Union. This research had the overarching objective of providing an updated economic analysis and overview of the structure and demographic makeup of the FDMP sector and its workforce. The recommendations that have been drawn from the key findings in this report are divided into four sets, aimed at the European Union and Member States, educators, the EU food and drink manufacturing and processing industry and the sector’s social partners. This report and its recommendations were presented at a major conference held in Brussels on 4 November 2013.

Moving on: 2014 Work Programme

The FoodDrinkEurope and EFFAT 2014 Work Programme (WP) is mainly based on the recommendations identified in the report ‘Ensuring sustainable employment and competitiveness in the EU Food and Drink Sector: Meeting the challenges of the labour market’.

The main topics that are included in this WP are: an EU Industrial Policy for the food and drink industry, managing an ageing workforce, tackling youth unemployment, improving the attractiveness of working in the EU food and drink industry and nanotechnology in food and drink. The output of the Social Dialogue discussions on these topics will be developed through joint statements and long term research projects, possibly funded by the European Commission.

FoodDrinkEurope’s Social Dialogue Platform, in collaboration with EFFAT, is committed to continue this extensive and long term work on these highly relevant topics for employers in the EU food and drink sector.

The General Assembly is composed of all FoodDrinkEurope members (national federations, European sector associations and large food and drink companies). It approves the annual accounts, adopts the Roadmap and establishes internal rules of procedure.

The Board of Directors is composed of 17 Directors, all CEOs of food and drink companies operating in Europe and five of whom are from SMEs. The Board defines FoodDrinkEurope's vision, policies and priorities in accordance with the Roadmap, which it submits to the General Assembly for approval.

The Committee of Directors General (CDG) is composed of representatives from each national federation and European sector association. It ensures smooth communication between the secretariat and its members.

The Liaison Committee (LC) is composed of representatives from each food and drink company member. It also ensures smooth communication between the secretariat and its members.

This management structure ensures all FoodDrinkEurope members input into the development of the organisation’s policies and priorities.

33  www.fooddrinkeurope.eu/about-us/members/
Board of Directors

As on 31 December 2013

Mr Jesús Serafín PÉREZ
President
Aguas de Fuensanta

Dr Wolfgang HEER
Vice-President
Südzucker

Mr Marco CAPURSO
Ferrero

Mr Jørgen DIRKSEN
Rynkeby Foods

Mr Pascal GILET
Heineken

Ms Dominique REINICHE
Vice-President
Coca Cola

Mr Jürgen HEDER
Danone

Mr Chris HOOD
Kellogg
[to be formally elected by the General Assembly in June 2014]

Mr Hubert WEBER
Mondelēz International
[to be formally elected by the General Assembly in June 2014]

Mr Attilio ZANETTI
Zanetti

Mr Frans EGBERTS
Henri van de Bilt

Mr Thomas KUNZ
Danone

Mr Peter WEST
Mars

Mr Michel DELBAERE
Treasurer
Crop's NV

Mr Laurent FREIXE
Nestlé

Mr James MOSELEY
General Mills

Ms Dominique REINICHE
Vice-President
Coca Cola

Mr Michel DELBAERE
Treasurer
Crop’s NV

Mr Laurent FREIXE
Nestlé

Mr James MOSELEY
General Mills

Mr Hubert WEBER
Mondelēz International
[to be formally elected by the General Assembly in June 2014]
National Federations
(26 including 3 observers)

**Austria**
FIAA - Fachverband der Nahrungs- und Genussmittelindustrie
www.dielebensmittel.at

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

**Croatia**
HUP - Hrvatska Udruža Poslodavaca
www.hup.com.hr

**Czech Republic**
PKČR - Potravinářská Komora České Republiky
www.foodnet.cz

**Denmark**
DI - DI Fedevalerindustrien
www.fi.di.dk

**Estonia**
ETL - Eesti Toiduainetööstuse Liit
www.toiduliit.ee

**Finland**
ETL - Elintarvikeetollisuusliitto
www.etl.fi

**France**
ANIA

**Germany**
BFU

**Italy**
BLL & BVE

**Japan**
SEVT

**Lithuania**
ETL

**Luxembourg**
FDII

**Netherlands**
DI - DI Fødevarerindustrien
www.fi.dk

**Norway**
FDII

**Poland**
BFU

**Portugal**
FDF

**Romania**
GZS

**Russia**
TGDF

**Spain**
FIPA

**Sweden**
FIPA

**Switzerland**
FIAÄ

**United Kingdom**
FNLI

**United States**
FEDERALIMENTARE
France
ANIA - Association Nationale des Industries Alimentaires
www.ania.net

Germany
BLL - Bund für Lebensmittelrecht und Lebensmittelkunde
www.bll.de
BVE - Bundesvereinigung der Deutschen Ernährungsindustrie
www.bve-online.de

Greece
SEVT - Σύνδεσμος Ελληνικών Βιομηχανιών Τροφίμων
www.sevt.gr

Hungary
ÉFOSZ - Élelmiszer-feldolgozók Országos Szövetsége
www.efosz.hu

Ireland
FDII - Food and Drink Industry Ireland
www.fdii.ie

Italy
FEDERALIMENTARE - Federazione Italiana dell’Industria Alimentare
www.lpuf.lv

Luxembourg
FEDIL - Fédération des Industries Agro-Alimentaires Luxembourgeoises
www.fedil.lu

Poland
PFPZ - Polska Federacja Producentów Żywności Związek Pracodawców
www.pfpz.pl

Portugal
FIPA - Federação das Indústrias Portuguesas Agro-Alimentares
www.fipa.pt

Romania
ROMALIMENTA - Federaţia Patronală din Industria Alimentară
www.romalimenta.ro

Slovakia
PKS - Potravinárska Komora Slovenska
www.pks.sk
SPPK - Slovenská Poľnohospodárska a Potravinárska Komora
www.sppk.sk

Slovenia
GZS - Gospodarska zbornica Slovenije
www.gzs.si

Spain
FIAB - Federación Española de Industrias de la Alimentación y Bebidas
www.fiab.es

Sweden
LI - Livsmedelsföretagen
www.li.se

The Netherlands
FNLI - Federatie Nederlandse Levensmiddelen Industrie
www.fnl.nl

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

Observers
BFU - Baltic Food Union
www.balticfoodunion.com

Norway
NHO - Mat og Drikke
www.nhomatogdrikke.no

Turkey
TGDF - Türkiye Gıda ve İçecek Sanayii Dernekleri Federasyonu
www.gdf.org.tr
European Sectors (25)

Beer
The Brewers of Europe
www.brewersofeurope.org

Bottled Waters
EFBW – European Federation of Bottled Waters
www.efbw.eu

Breakfast Cereals
CEEREAL – European Breakfast Cereal Association
www.ceereal.eu

Broths & Soups
CULINARIA EUROPE – Federation of Associations and Enterprises of Industrial Culinary Product Producers in Europe
www.culinaria-europe.eu

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

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

Dietetic Products
SNE – Specialised Nutrition Europe
www.specialisednutritioneurope.eu

Fruit & Vegetable Juices
AIJN – European Fruit Juice Association
www.aijn.org

Fruit & Vegetable Preserves
PROFEL – European Association of Fruit & Vegetable Processors
www.profel-europe.eu

Honey
FEEDM – European Federation of Honey Packers & Distributors
www.feedm.com

Ice Cream
EUROGLACES – European Ice Cream Association
www.euroglaces.eu

Intermediate Products for Bakery & Confectionery
FEDIMA – Federation of EU Manufacturers and Suppliers of Ingredients to the Bakery, Confectionery and Patisserie Industries
www.fedima.org

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

Pasta
UNAFPA – Union of Organisations of Manufacturers of Pasta Products of the EU
www.pasta-unafpa.org

Processed Meats
CLITRAVI – Liaison Centre for the Meat Processing Industry in the European Union
www.clivtravi.eu

Processed Potatoes
EUPPA – European Potato Processors’ Association
www.euppa.eu

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

Soft Drinks
UNESDA – Union of European Soft Drinks Associations
www.unesda.org

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

Spices
ESA – European Spice Association
www.esa-spices.org

Spirits
spiritsEurope
www.spirits.eu

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

Tea & Herbal Infusions
ETC – European Tea Committee
www.etc-online.org

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

Yeast
COFALEC – Confederation of EU Yeast Producers
www.cofalec.com
As on 31 December 2013

Companies (18)

AGROKOR
Barilla
Cargill
The Coca-Cola Company
DANONE
FERRERO
GENERAL MILLS
HEINEKEN
Heinz
Kellogg’s
MARS
Mondelez International
Nestlé
PEPSICO
SÜDZUCKER
TATE & LYLE
Ülker
Unilever
Experts from FoodDrinkEurope’s membership make up the Committees and Expert Groups. They work together using their expertise to follow dossiers, analysing particular issues, aiming to find a common FoodDrinkEurope position.

Food and Consumer Policy Committee
Chair
Geoff Thompson (Danone)

Steering Group
Barbara Gallani (FDF)
Clare Leonard (Mondelēz International)
Angelika Mrohs (BLL)
Monstserrat Prieto Gobena (FIAB)
Daniele Rossi (FEDERALIMENTARE)
Dick Toet (Unilever)
Bart Vandewaetere (Nestlé)

Expert Groups (FCP 1)
CONSUMER INFORMATION
Angelika Mrohs (BLL)

TECHNICAL AMENDMENTS (ad hoc)
Isabelle Caelen (Nestlé)

PORTION SIZES (ad hoc)
Vanessa McConkey (General Mills)

NUTRITION AND HEALTH CLAIMS
Susanne Kettler (Coca-Cola)
Victoria Betteridge (Tate & Lyle)

DIET
Sylvie Chatron (Mars)
Sebastian Emig (ESA)

ADDITION OF NUTRIENTS
Vacant

Expert Groups (FCP 2)
CONTAMINANTS
Ron Colwell (Heinz)
Richard Stadler (Nestlé)

FOOD CONTACT MATERIALS
Leonor Garcia (Coca-Cola)
Ludovica Verzegnassi (Nestlé)

DECLARATION OF COMPLIANCE (ad hoc)
Vacant

FOOD INGREDIENTS
Geert De Rooij (FNLI)
ADDITIVE CATEGORIZATION (ad hoc)
ENZYME GUIDELINES (ad hoc)
Jean-Christophe Kremer (FEDIMA)
FLAVOURINGS GUIDELINES (ad hoc)
Viviane Vijverman (FEVIA)
INTAKE DATA COLLECTION (ad hoc)

FOOD SAFETY MANAGEMENT AND HYGIENE
Jean Louis Cordier (Nestlé)
Matilda Freund (Mondelēz International)

INCIDENT MANAGEMENT GROUP
Mella Frewen (FoodDrinkEurope)

NANOTECHNOLOGY
Mike Knowles (Coca-Cola)

NOVEL FOODS/GMO
Agnès Davi (Danone)
PROCESS CONTAMINANTS
Richard Stadler (Nestlé)

R&D
Daniele Rossi (FEDERALIMENTARE)

SCIENCE
Clare Leonard (Mondelez International)
Peter Van Bladeren (Nestlé)

BETTER REGULATION (ad hoc)
Dick Toet (Unilever)

ALLERGEN (ad hoc)
Ron Colwell (Heinz)

ETP ‘Food for Life’ Secretariat
Michael Knowles (Coca-Cola)
Daniele Rossi (FEDERALIMENTARE)

ETP Board
Michael Knowles (Coca-Cola)

ETP Coordination Committee
Michael Knowles (Coca-Cola)

National Technology Platforms
Daniele Rossi (FEDERALIMENTARE)

Innovation supported by Communication Training and Technology Transfer
Julian Drausinger (LVA Lebensmittelver)

Improve Health, Well-being and Longevity
Vacant

Safe Food that Consumers can trust
Vacant

Sustainable & Ethical Production
Ulf Sonesson (SIK- Swedish Institute for Food and Biotechnology)

Food Processing, Packaging & Quality
Dietrich Knorr (Technical University Berlin)

Food and Consumers
Hans van Trij (Wageningen University)

Food chain management
Gerhard Schiefer (University of Bonn)

International Activities Task Force
Michael Knowles (Coca-Cola)

Public Private Partnership Task Force
Jan Jacobi (GFP/FEI)

Small and Medium Enterprises Task Force
András Sebok (Campden BRI Magyarorszag Nonprofit Kft)

Competiveness Committee
Chair
Horacio González Alemán (FIAB)

Steering Group
Franz Kraus (Mondelez International)
Bart Vandewaetere (Nestlé)
Murk Boerstra (FNLI)
Damiano Di Natale (Ferrero)
Bruno Guichart (FIAB)
Paul Kelly (FDII)
Willem-Jan Laan (Unilever)
Susanne Langguth (Südzucker)
Bénédicte Masure (EDA)
Bernard Valluis (ANIA)

Expert Groups
AGRICULTURAL POLICY
Susanne Langguth (Südzucker)

BIOFUELS
Willem-Jan Laan (Unilever)

COMMERCIAL RELATIONS
Paul Kelly (FDII)
Michele Spangaro (FEDERALIMENTARE)

DERIVATIVES
Bernard Valluis (ANIA)

ECONOMIC RESEARCH & ANALYSIS
Murk Boerstra (FNLI)

IMPORT/EXPORT PROCEDURES
Damiano Di Natale (Ferrero)
Peter Hoftland (Cargill)

TRADE
Bénédicte Masure (EDA)
Environmental Sustainability Committee

**Chair**
Pascal Gréverath (Nestlé)

**Steering Group**
David Bellamy (FDF)
Paul Gardiner (CEFS)
Franco Grilli (Ferrero)
Ann Nachtergaele (FEVIA)
Paloma Sanchez (FIAB)
Anna Vainikainen (ETL)

**Expert Groups**

**CLIMATE**
Paul Gardiner (CEFS)

**INDUSTRIAL EMISSION DIRECTIVE**
Paul Gardiner (CEFS)

**EUROPEAN FOOD SUSTAINABLE CONSUMPTION AND PRODUCTION (SCP) ROUNDTABLE**
Pascal Gréverath (Nestlé)
Philippe Diercxsens (Danone)

**RT Mirror Group 1 (assessment methodology)**
Jean-Christophe Bilgny (Danone)

**RT Mirror Group 2 (communication tools)**
Ulrike Sapiro (Coca-Cola)

**RT Mirror Group 3 (improvement)**
Vacant

**RT Mirror Group 4 (non-environmental aspects)**
Vacant

**WASTE & PACKAGING WASTE**
Franco Grilli (Ferrero)

**FOOD WASTAGE**
David Bellamy (FDF)

**REPORTING**
Vacant

**WATER**
Bert De Meester (Nestlé)

**IPCC DIRECTIVE**
Vacant

Communications Advisory Group

**Chair**
Shane Dempsey (FDII)

**Vice-Chair**
Simone Ceruti (Danone)

National Federations
European Sectors
Liaison Committee members

Social Dialogue Platform
Michael Andritzky (BLL/BE)
Miguel Angel Ortega Bernal (FIAB)

Strategic Tax Group
Salvatore Gabola (Coca Cola)

As on 31 December 2013
FoodDrinkEurope’s permanent secretariat, based in Brussels, maintains close contacts with European and international institutions and is a major partner in consultations on all issues affecting Europe’s food and drink industry.

The secretariat coordinates the work of more than 700 experts in FoodDrinkEurope’s Committees and Expert Groups around four themes: food and consumer policy (food safety and science, nutrition and health), environmental sustainability and competitiveness.