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In 2017 I had the pleasure, and the privilege, to take up the important mission of becoming President of FoodDrinkEurope. It was an interesting year and I would like to thank the members of the organisation, and the Secretariat, for their achievements over the past 12 months.

Being at the helm of Europe’s food and drink industry during these changing times is quite a responsibility. The food and drink industry is Europe’s leading manufacturing sector, with a €1,098 billion turnover, and is a key job provider, with 4.2 million employees. The food and drink sector is inextricably intertwined in Europe’s social, cultural and economic fabric. It is also a global champion, and the largest exporter of food and drink products in the world. Thanks to its ongoing ambition to increase value added by 2.5-3.5% per year by 2025, the industry will continue to provide economic growth and jobs for EU citizens, ensure the satisfaction and well-being of consumers and secure environmental sustainability. And I am pleased to announce that since the industry established this ambition, it is firmly on track in achieving this growth rate.

Our commitment to growth is however threatened by increasing fragmentation on the European Union’s internal market, with different Member States deciding to go on their own ways on various pieces of food and drink legislation. In this context, a well-functioning Single Market is now becoming the industry’s most important priority. On top of the fragmentation challenge, Brexit is adding one more level of complexity and uncertainty for businesses on both sides of the channel.

The food and drink industry operates, and will continue to operate responsibly, in order to achieve our goals in a sustainable way, we rely on an enabling policy framework to effectively tackle the challenges we face and seize the opportunities we are presented with. Our ability as an industry to do this is of great importance for the sector’s contribution to the success of the EU growth and jobs agenda.

In 2018 we celebrate the 25th anniversary of the EU Single Market, undoubtedly one of Europe’s most important achievements, and I invite all of our stakeholders, and in particular the competent authorities, to reflect on the achievements of the last 25 years, and to put the Single Market central in all food and drink policies for the future.

2017 was an important year for FoodDrinkEurope, with an impressive amount of memorable events and achievements, some of which are presented in this annual report; I hope you will enjoy reading it!

One event is particularly noteworthy: our General Assembly last June elected our new President, Hubert Weber, Executive Vice President and President Europe for Mondelēz International. I would like to take this opportunity to welcome Hubert and to thank him again for agreeing to step up to the task!

Among the new challenges we had to face in 2017, and indeed continue to confront, was renationalisation of legislation, and different interpretations and “gold-plating” of EU laws, which increasingly lead to barriers for food and drink companies within the EU 28. This year we launched a new campaign to celebrate and promote the Single Market, highlighting its benefits for businesses and consumers alike.

Europe’s food and drink manufacturers are committed to promote sustainable practices and aim to make a major contribution to the targets set within the UN 2030 Agenda for Sustainable Development, strengthening the links between food, people and the planet. Science and science-based regulation have an important role to play in helping the industry meet the challenges it faces.

The food and drink industry – Delivering high level food industry skills in the digital economy’ aimed at creating and maintaining employment in the sector meet the challenges it faces. FoodDrinkEurope contributed to important discussions on the EU E&I Framework Programme, sequels to Horizon 2020, and urged EU institutions to, not only develop an ambitious plan but also to ensure an appropriate budget – including increased support for E&I in areas relevant to the food and drink sector.

Our project “Pantries of Europe” was just one ingredient in this campaign, prompting us to acknowledge how much more diverse our pantries have become since the lifting of cross-border restrictions in 1993. The goal of this campaign is to demonstrate that this tremendous choice, incredible diversity, high quality and sheer great taste would not have been possible without the Single Market and its EU level legislation. 2017 was also an important year for agri-food promotion in third markets FoodDrinkEurope accompanied Commissioner Phil Hogan in the high-level business delegation visits to Canada in May and to Iran in November, organised by DG AGRI. During these two missions, we had the opportunity to discuss, with key Canadian and Iranian policy makers and business representatives, cooperation on trade, food safety issues and many other food-related topics.

Back in the EU we faced a particular challenge when political authorities in several Central and Eastern European EU Member States alleged that the food products sold to consumers in their markets are of inferior quality compared to similar products sold in Western Europe. The food and drink industry takes these so-called ‘dual quality’ allegations very seriously, all consumers are considered equal and deserve the best quality and the highest safety we can guarantee. FoodDrinkEurope met several times with Commissioner Jourová and, along with colleagues from AWI (the brand manufacturers) and Eurocommerce (importers) defended the food industry’s view at an important Summit “For equal quality of products for all”, which was held in Bratislava in October.

Underpinning everything we do is the drive to operate responsibly, respecting not only the economic, but also the social and environmental aspects of our business. FoodDrinkEurope commenced, along with its social partners EFFAT, a further study dedicated to “New Professions and career paths in the food and drink industry - Delivering high level food industry skills in the digital economy” aimed at creating and maintaining employment in the industry in a more and more digitalised world. Substantial time and resources were also dedicated to promoting sustainable practices and implementing the targets set within the UN Sustainable Developments Goals (SDGs), strengthening the links between food, people and the planet. Our work was recognised at a European and global level, when we were invited to become a ‘Friend of Champions 12.3’, a coalition of executives from governments, businesses, international organisations, research institutions, farmer groups, and civil society, dedicated to inspiring ambition, mobilizing action, and accelerating progress toward achieving SDG 12.3 by 2030.

Research and Innovation are also of crucial importance to help our sector meet the challenges it faces. FoodDrinkEurope contributed to important discussions on the EU E&I Framework Programme, sequels to Horizon 2020, and urged EU institutions to, not only develop an ambitious plan but also to ensure an appropriate budget – including increased support for E&I in areas relevant to the food and drink sector.

Our media presence this year was quite a success. We established a substantial presence on social media, and in particular on Twitter – where we have one of the leading trade association handles in terms of followers – and a huge number of our stories and quotes featured in prominent media outlets throughout Europe.

You can read all about these issues, and many more of our activities, in this report which summarises the top-of-mind events of 2017. Before closing this short introduction, I would like to express my gratitude to all of our members for their support throughout the year! Their input and expert guidance are precious and an essential ingredient in our daily work.

Finally, my thanks to the FoodDrinkEurope team whose professionalism, positive energy, and passion for high quality is truly inspiring!

Bonne lecture!

Mella Frewen
Director General
A YEAR TO REMEMBER

2017 was a busy and very productive year for FoodDrinkEurope, despite the challenging political landscape. FoodDrinkEurope and its members have increasingly been engaging with policy makers and various stakeholders to convey Europe’s food and drink industry’s responsibility to keep generating growth and jobs, ensure the satisfaction and well-being of consumers, and of course operate sustainably.

MILESTONES

5 MAJOR EVENTS
Including the inaugural Annual Event & the 15th Anniversary of the General Food Law

35 HIGH-LEVEL ONE-TO-ONE MEETINGS
With Vice-Presidents, Commissioners, Prime Ministers, Ministers, MEPs and Ambassadors

DIRECT ENGAGEMENT WITH 70 MEPs

3 OFFICIAL EUROPEAN COMMISSION TRADE MISSIONS

26+ RESPONSES TO PUBLIC CONSULTATIONS

70+ NEW POSITION PAPERS

26+ NEW POSITION PAPERS

PARTICIPATION IN 3 OFFICIAL EUROPEAN COMMISSION TRADE MISSIONS

12 SUBMISSIONS TO WTO NOTIFICATIONS

11,500 TWITTER FOLLOWERS

1600 DOWNLOADS

18,600 UNIQUE MONTHLY WEBPAGE VIEWS

5 PUBLICATIONS

60+ SPEAKING ENGAGEMENTS

11,500 FACEBOOK LIKES

225 MEDIA MENTIONS

74 MEDIA QUERIES

30 INTERVIEWS
Including the Financial Times, BBC, the Economist, ARTE, France 2, Der Spiegel

3 NEW WEBSITES

5PUBLICATIONS

2 PODCASTS

800+ MEDIA QUERIES

800+ MEDIA QUERIES

3PODCASTS

30% INTERVIEWS

30% INTERVIEWS

15% FROM 2016

15% FROM 2016
PROVIDING ECONOMIC GROWTH AND JOBS FOR EU CITIZENS

SMALL SCALE, BIG IMPACT: SMALL AND MEDIUM-SIZED ENTERPRISES (SMEs) AT THE HEART OF EUROPE’S FOOD AND DRINK INDUSTRY

Following up from the launch of the SME initiative entitled “Small Scale, Big Impact” in 2016, FoodDrinkEurope actively continued to promote and showcase the diversity, culture, tradition and contribution to growth of Europe’s food and drink small and medium-sized enterprises.

The next step of “Small Scale, Big Impact” was focused on connecting SMEs with Members of the European Parliament, thanks to the “Tag an SME” project, where MEPs put forward SMEs from their own regions as examples of companies that, regardless of their size, have a significant impact on the local economy.

During the course of this phase MEPs Nicola Caputo (S&D, IT), Anneli Jäätteenmäki (ALDE, FI) and Renate Sommer (EPP, DE) hosted a FoodDrinkEurope networking reception in November 2017, at the European Parliament, which was an officially recognised event of the European SME Week. Members of the European Parliament welcomed 8 SME entrepreneurs from various Member States who presented their products and showcased their know-how and traditions. The successful event had a great turnout with 6 MEPs present at the event, as well as high level participants from the Commission and from national governments. During the evening, an impressive twitter buzz was generated with the event hashtag reaching 2nd place as a twitter trending topic in Belgium.

On that occasion, FoodDrinkEurope launched a White Paper calling for specific policy measures to help food and drink SMEs thrive and grow.

Thanks to the meaningful engagement with the MEPs and the policy recommendations featured in the White Paper, FoodDrinkEurope wants to promote further dialogue with food and drink SMEs and help ensure that their concerns and needs are taken into consideration by policy-makers.

4.2 MILLION PEOPLE ARE EMPLOYED BY THE FOOD AND DRINK INDUSTRY IN THE EU

THERE ARE 289,000 FOOD AND DRINK COMPANIES IN EUROPE
9 in 10 ARE SMALL AND MEDIUM-SIZED COMPANIES (SMEs)

THESE COMPANIES PRODUCE A VAST RANGE OF FOOD AND DRINK PRODUCTS, SATISFYING THE DIVERSE AND CONSTANTLY CHANGING NEEDS OF EUROPE’S 500 MILLION CONSUMERS AND A MULTITUDE OF OTHER CUSTOMERS WORLDWIDE
IMPLEMENTING THE EU FOOD & DRINK INDUSTRY AMBITION FOR GROWTH & JOBS

In 2017, one year after Europe’s food and drink industry announced its commitment to generate a value added growth of 2.5-3.5% per year by 2025, FoodDrinkEurope monitored progress towards the industry’s growth ambition.

For the time being, the industry is on track with its ambition but progress is threatened by the current difficult and uncertain climate. This highlights the need to implement the necessary EU policy actions to enable the food and drink industry to grow, to create more jobs, to generate more value added and to do this in a sustainable way. A new report outlines FoodDrinkEurope’s policy priorities and recommendations for 2018. These priorities include, first and foremost, an ambitious and comprehensive Single Market strategy.

THE HIGH LEVEL FORUM FOR A BETTER FUNCTIONING FOOD SUPPLY CHAIN (HLF)

Throughout 2017, FoodDrinkEurope took an active part in the work of the HLF and its sub-groups (Food Euro, internal market, digitalisation and private labels). FoodDrinkEurope participated in the HLF meeting on the 6th of December 2017 where three Commissioners were present.

Thanks to this engagement, FoodDrinkEurope was able to relay cross-industry messages on the internal market, unfair trading practices and price transparency. Moreover, Mella Frewen shared the industry’s ambition with the HLF 1st the HLF Sherpa meeting on 3 October and advocated for a positive and ambitious agenda for the HLF.

Thanks to its ongoing ambition to increase value added by 2.5-3.5% per year by 2025, the industry will continue to provide economic growth and jobs for EU citizens, ensure the satisfaction and well-being of consumers and secure environmental sustainability.

INDUSTRIAL POLICY

FoodDrinkEurope took an active part in the Industry4Europe coalition, notably on the Single Market chapter of the coalition’s reaction to the Commission Communication ‘For an ambitious EU industrial strategy’.

The coalition published a Joint Declaration in February 2017, a few days ahead of the 1st Industry Day organised by DG GROW. This was a wake-up call to put back industry high on the Commission’s agenda. This Declaration led to an intense advocacy campaign and, in September 2017, the Commission published a Communication on ‘A renewed EU Industrial Policy Strategy’. However, as a long-term vision and concrete objectives were lacking in the Communication, the coalition released a longer document ‘For an ambitious EU industrial strategy’ in October 2017 which provides details on the different topics (internal market, skills, trade, access to finance, R&I and governance). Recently, the coalition has worked with the Council Presidencies on indicators and governance, and prepares its strategy for the upcoming Commission.

UNFAIR TRADING PRACTICES (UTPs)

Food processors of all sizes are exposed to UTPs, affecting their capacity to invest and innovate in the long-term. FoodDrinkEurope reacted to the Commission’s inception impact assessment in August and responded to the public consultation in November on UTPs and on market transparency.

In October 2017, FoodDrinkEurope’s Board agreed that the organisation should fully and proactively engage in the debate on UTPs to inform the impact assessment and influence the outcome. Following up from this decision, FoodDrinkEurope had several meetings with the Commission (DG AGRI, DG GROW, Secretariat General) to provide evidence for the impact assessment.

With its central position in the food supply chain between farmers and retailers, the food processing industry needs fair competition conditions along the chain and well functioning markets.

For FoodDrinkEurope, the legislation which will provide a harmonised framework at EU level needs to cover all operators in the food chain and all food products. It should be based on the Supply Chain Initiative’s Principles of Good Practice.
THE COMMON AGRICULTURAL POLICY

Since the beginning of the consultation process on “Modernising and Simplifying the CAP”, FoodDrinkEurope has been actively involved in the discussions. FoodDrinkEurope organised a workshop in February 2017, with Tassos Haniotis, Director of Strategy and Policy Analysis from DG AGRI and representatives from Wageningen University. In April 2017, FoodDrinkEurope took part in the public consultation and successfully adopted a position paper calling for:

• A truly common agricultural policy, which underpins a strong and well-functioning Single Market with fair competition conditions for farmers across Member States.
• A CAP that promotes market-orientation in agriculture, as the most efficient approach to improve the competitiveness of EU farmers and to deliver agricultural raw materials that are in line with the quality and quantity needs of the industry and of consumers.
• A CAP that strengthens EU agriculture and makes it more resilient, while also encouraging a move to address climate change.

FoodDrinkEurope promoted its views both in bilateral meetings with EU institutions and in DG AGRI events (i.e. the CAP conference in July 2017) and Civil Dialogue Group meetings (all year long). The FoodDrinkEurope position was featured in a report from the European Committee of the Regions. FoodDrinkEurope also joined forces on this topic with other stakeholders, such as the Agri-food Chain Coalition and EFFAT.

In November 2017, FoodDrinkEurope reacted to the Commission Communication on “The future of food and farming”, issuing a statement calling for a strong role of the Commission in the assessment, approval and monitoring of the CAP Strategic plans, to prevent any renationalisation, since greater subsidiarity might be granted to Member States.

In parallel to the broad consultation process on CAP, in the course of 2017 FoodDrinkEurope followed closely the Omnibus regulation. Initially meant to be a pure simplification exercise that would introduce technical changes to the CAP regulation, during the inter-institutional negotiations the Omnibus evolved into a mid-term review of the CAP.

EU PROMOTION POLICY FOR AGRI-FOOD PRODUCTS

In December 2017, FoodDrinkEurope, together with Copa-Cogeca and CELCAA, organised a well-attended technical meeting to discuss the lessons learnt from the 2017 calls for proposals on the EU promotion policy with DG AGRI and CHAFEA. Members had the unique opportunity to receive from EU officials their insights on the submitted proposals, the assets of the awarded projects and recommendations for future applicants.

Moreover, FoodDrinkEurope submitted its contribution to the 2018 Annual Work Programme of the EU promotion policy in March 2017 and provided input all year long. FoodDrinkEurope supported the emphasis on third countries and considers that the promotion policy has a key role to play in increasing the export opportunities of European operators. FoodDrinkEurope also asked that the calls are defined in a manner that allows all eligible products, including processed products, to apply and qualify for such programmes.

FoodDrinkEurope and members accompanied Commissioner Phil Hogan to the high-level business delegation visits to Canada (1-3 May) and Iran (7-13 November). In Canada, Mella Frewen made a presentation ‘Road to success: CETA and the future of EU-Canada trade’, in the presence of Commissioner Hogan and Lawrence MacAulay, Canadian Minister of Agriculture at the opening of the SIAL Canada 2017 food exhibition. Mella Frewen was also part of the business delegation that accompanied Commissioner Hogan in the mission to Iran. In this context, Mella Frewen had the opportunity to meet with key EU and Iranian policy makers and business representatives, and discuss cooperation on various food-related issues like trade and food safety.

EU-CANADA FOOD AND DRINK TRADE (2016, € MILLION)

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<th>EXPORTS</th>
<th>IMPORTS</th>
<th>BALANCE</th>
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<td>Food and drink</td>
<td>2,991</td>
<td>855</td>
<td>2,136</td>
</tr>
<tr>
<td>2012-2016 change</td>
<td>16%</td>
<td>14%</td>
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KEY EU FOOD AND DRINK EXPORTS

spirits, beer, wine, chocolate and confectionery, bread, pastry and biscuits, olive oil cheese, etc.

KEY EU FOOD AND DRINK IMPORTS

fish products, fruit and vegetable products, etc.

and primarily agricultural commodities such as oils seeds and cereals

1 CHAFEA: Consumers, Health, Agriculture and Food Executive Agency
MULTILATERAL TRADE NEGOTIATIONS

In September 2017, a FoodDrinkEurope delegation attended the 2017 WTO Public Forum entitled "Trade: Behind the Headlines" held at the WTO headquarters in Geneva. On this occasion, the delegates also met with representatives of the WTO Secretariat, the Chairperson of the WTO Committee on Agriculture, and various Geneva-based Missions (EU, US, UK) to discuss, amongst others, the progress ahead of the 11th WTO Ministerial Conference in Buenos Aires, Argentina, in December 2017.

BILATERAL TRADE NEGOTIATIONS

FoodDrinkEurope was active on a range of EU bilateral trade negotiations and agreements with third countries, in particular the EU-Canada Comprehensive Economic and Trade Agreement (CETA) which entered into force provisionally in September 2017 – as well as the EU-Japan Economic Partnership Agreement (EPA) trade talks which were finalised in December last year.

During the high-level Mission of Commissioner Hogan to Canada in May 2017, FoodDrinkEurope issued a joint statement together with Food & Consumer Products of Canada (FCPC), in support of CETA and ‘trade deals as catalysts for growth and jobs’.

In July 2017, FoodDrinkEurope, Copa-Cogeca, and CELCAA jointly welcomed the ‘in principle’ agreement on the EU–Japan EPA and in December 2017, FoodDrinkEurope welcomed the finalisation of the EU-Japan EPA trade talks. FoodDrinkEurope also participated in a seminar on Japan’s approval system for food additives, organised by the Mission of Japan to the EU. In addition, FoodDrinkEurope responded to several public consultations of the European Commission such as the one on EU-Mexico trade relations (January 2017) and on the implementation of the EU-Korea FTA (March 2017).

MARKET ACCESS PARTNERSHIP

FoodDrinkEurope continues to play an active role in the different committees set up under the EU’s Market Access Partnership (MAP) including the Market Access Advisory Committee (MAAC) and SPS Market Access Working Group (SPS MAWG) - which bring together the Commission, Member States and representatives of business associations on a regular basis to address and solve concrete market access issues in third countries.

In 2017, FoodDrinkEurope also helped to identify and facilitate the inclusion of food and drink industry company success stories in the European Commission’s ‘Trade and Investment Barriers Report 2017’.

CETA is expected to strengthen the trade and investment relations between two of the world’s most advanced economies and like-minded partners, for the benefit of growth and jobs. Europe’s food and drink manufacturers stand to benefit from an improved market access to Canada and look forward to the new opportunities.

Mella Frewen, Director General, FoodDrinkEurope

EU SECTORAL SOCIAL DIALOGUE COMMITTEE OF THE FOOD AND DRINK SECTOR

FoodDrinkEurope and EFFAT (European Federation of Food, Agriculture and Tourism Trade Unions) are Social Partners thus part of the Commission (DG EMPL) ‘EU Sectoral Social Dialogue Committee’ representing the food and drink industry.

After a two year long joint research project both organisations in September 2016 launched a toolbox report in Bratislava, entitled “Bringing in new talent and managing an ageing workforce: two sides of the same coin – implementing good practices for a more attractive food and drink sector”.

This toolbox is based on a compilation of 28 hands-on good practice examples and tools submitted by respective national affiliates and members of the European social partners. Also available online as a living database, it allows employers, employees and interested parties to consult and share initiatives on new innovative ways to address issues such as recruiting more young people and retaining older workers in employment, with the context of also improving the image of the sector.

As a follow up to the toolbox mentioned above, both Social Partners are currently engaging in a new EU funded project entitled ‘New Professions and career paths in the food and drink Industry – Delivering high level food industry skills in the digital economy’. This project, which is intended to be finalized in Q4 of 2019, has the objective of identifying new technologies in the food and drink industry, as well as the emerging jobs and new skills and type of qualifications required.

TOOLBOX RECOMMENDATIONS

1. ATTRACTING NEW TALENT TO THE FOOD AND DRINK INDUSTRY

2. MANAGING AN AGEING WORKFORCE

3. IMPROVING THE SECTOR’S IMAGE

The European social partners, FoodDrinkEurope and EFFAT, have joined forces to identify bottlenecks in recruiting new and skilled employees and to tackle challenges arising when companies have an ageing workforce.
ENSURING A SCIENCE-BASED APPROACH TO FOOD SAFETY AND INNOVATION

FoodDrinkEurope and its members have extensive procedures in place to ensure all products on the market meet the highest standards, most recent certification schemes and, of course, the latest legal requirements. These procedures include work on ingredients, on materials which are in contact with food, on allergens, and – from a broader perspective – on chemical and biological food safety aspects.

FOOD SAFETY MANAGEMENT

Throughout 2017, FoodDrinkEurope worked on various key food issues and some of the key achievements include the following milestones:

With regards to general food safety management issues, FoodDrinkEurope commented on the European Commission’s discussion paper on regulatory approaches to third party certification in food safety. In a global context, FoodDrinkEurope was also involved in various Codex committee discussions, such as the paper on future strategies.

FoodDrinkEurope continued to promote its position on food fraud towards its membership. FoodDrinkEurope worked closely with the European Commission and its members on potential fraud cases to prevent damage both for the industry and consumers.

Regarding acrylamide, a chemical produced naturally in food as a result of cooking starch-rich food at high temperatures, FoodDrinkEurope welcomed the publication of the European Commission Regulation establishing mitigation measures and benchmark levels for the reduction of the presence of acrylamide in food. Europe’s food and drink industry has worked on the mitigation of acrylamide on a cooperative basis since the discovery of its presence in food in 2002, and this legislation builds upon this work. This development was an important step for both industry and consumers in order to mitigate the presence of acrylamide in food.

In the area of food contact materials, FoodDrinkEurope contributed to the survey on the use of compliance documentation in official controls and in the supply chain and submitted input to the Commission’s Roadmap on the evaluation of food contact materials. FoodDrinkEurope continued working closely with its value-chain partners, developing common views on a future EU legislation on printed food contact materials. FoodDrinkEurope also published the second version of its Industry Guidelines on printed cartons. This document is intended to illustrate best practice in ensuring the regulatory compliance of printed cartons intended for packaging food products.

In the context of better regulation, FoodDrinkEurope continued its contribution to the content of the European Commission Communication on EU Regulatory Fitness (REFIT) with a view to examining the functioning of the general food law and also contributed to the evaluation of crisis management and the functioning of the RASFF – the Rapid Alert System for Food and Feed. In December 2017, the Commission presented a roadmap to address transparency and sustainability of
the European risk assessment model in the food chain and FoodDrinkEurope responded to this consultation.

In the area of food contaminants and also in relation to the REACH exercise, FoodDrinkEurope worked with stakeholders, such as ECPA – the European Crop Protection Association, on the review of pesticide legislation.

Also in 2017, FoodDrinkEurope set up an expert group dealing with the issue of mineral oils in food, including developing suitable testing methods.

Following the publication of the revised novel food regulation, FoodDrinkEurope contributed to a number of public consultations, such as on the implementing act on the Union list and on administrative and scientific requirements concerning traditional foods from third countries and applications referred to in Article 10 of the regulation. A technical meeting for all applications referred to in Article 10 of the novel food regulation, FoodDrinkEurope was set up in order to help the industry meet the challenges it faces. The discussions about the EU R&I Framework Programme that will follow Horizon 2020 started in 2017. FoodDrinkEurope has contributed to this discussions by publishing its views on how this programme could look like.

FoodDrinkEurope calls on the EU institutions to develop an ambitious one and ensure an appropriate budget for it - including increased support for R&I in areas relevant to the food and drink sector.

FoodDrinkEurope was a partner of the EU-funded project ‘Promoting Societal Engagement in Research and Innovation - PROSO’, which in June 2017 organised a conference in Brussels to share views and experiences across societal groups in regard to the incentives and barriers that encourage or discourage societal engagement with R&I.

The major goal of the PROSO project was to provide guidance on how to encourage engagement of citizens and third sector organizations, like non-governmental organizations (NGOs) and civil society organizations (CSOs), in Europe’s research and innovation processes.

FoodDrinkEurope also continued to contribute to the development of the sectoral guidance document on Food and Feed of the EU ‘Access and Benefit-Sharing’ regulation, which aims at establishing a framework governing compliance with requirements for access to genetic resources and for benefit-sharing in accordance with the Nagoya Protocol.

Established back in 2005 under the management of FoodDrinkEurope, the ETP ‘Food for Life’ is an industry-led, public-private collaboration with the recognition of the European Commission, with the aim to drive forward R&I to create a better working European food system for all.

Following the update of the ETP’s Strategic Roadmap in 2016, the ETP started developing a new Implementation Action Plan, which will define how the action items listed in the SRA should be executed. Prior to the finalisation of this IAP in 2018, the ETP published in 2017 one of the IAP chapters that focuses on Implementation Actions for FoodDrinkEurope.

The ETP ‘Food for Life’ is an industry-led, public-management of FoodDrinkEurope, the ETP published in 2017 one of the IAP chapters that focuses on Implementation Actions for FoodDrinkEurope. This publication was developed jointly with the European Collaboration of the National Food Technology Platforms and the European Federation of Food Science and Technology and distributed at the FOOD 2030 event organised by the Commission in October 2017.

The ETP ‘Food for Life’ is a partner in the Fit4FOOD2030 project, started in November 2017 and which seeks to support the European Commission’s FOOD 2030 initiative and mobilise a wide variety of stakeholders at the level of cities, regions, countries, and Europe to build up R&I in order to ‘future-proof’ the European food system.

Other related initiatives

Throughout 2017, FoodDrinkEurope, via the ETP ‘Food for Life’, held the chairmanship of the Stakeholder Advisory Groups of the Joint Programming Initiatives (JPIs) ‘Healthy Food, and ’Agriculture, Food Security and Climate Change’. The JPIs were established in order to make better use of Europe’s precious public research and innovation resources and to tackle common European challenges more effectively.

FoodDrinkEurope is also a member of the External Advisory Board of the ERA-Net Cofund SUSFOOD2, aimed at increasing cooperation and synergy between the European partners and defining common future perspectives in sustainable food production and consumption.
NUTRITION & HEALTH AND CONSUMER INFORMATION

Alongside healthy and active lifestyles, balanced diets are essential to good health. Consumers would like to eat and live more healthily but do not always know how. Europe’s food and drink industry contributes to this goal but cannot do it alone. Joint action is needed on this front and FoodDrinkEurope is willing to work together with public authorities and other stakeholders towards improving the diets of European consumers.

JOINING FORCES FOR AN ACTUAL CHANGE: TOGETHER FOR MORE #BALANCEDDIETS

On the occasion of the European Business Summit in 2017, as part of a panel on “Sustainable Living: Foresights for 2050”, FoodDrinkEurope launched a Call for Action to help improve diets and promote good nutrition and health. In doing so, the organisation of Europe’s food and drink industry called upon all interested parties and stakeholders to join forces and look ahead to tackle today’s societal challenges related to nutrition and health. Working with European partners can help achieve a 10% reduction of the overall calorie intake of European consumers by 2020 and create new opportunities for business and society.

Dialogue, synergies, a coordinated approach and a more positive communication to consumers can only help reinforce all partners’ efforts. The food industry is committed to work, amongst others, on product formulation, innovation, choice and portion sizes, clear labelling and awareness raising to contribute to a more balanced diet, as illustrated in FoodDrinkEurope’s Eat & Live Well.

With FoodDrinkEurope’s Call for Action other stakeholders in civil society, such as food chain partners (e.g. farmers, retail, catering, bars and restaurants), public authorities, consumer groups and public health NGOs, are invited to join, since a multi-stakeholder approach is the strongest, most successful and efficient way to work towards this EU-wide ambition.

CONSUMER INFORMATION

FoodDrinkEurope actively followed the developments related to country of origin labelling, especially in the context of the adoption of national rules on mandatory origin labelling for certain foods and of the draft Commission Implementing Regulation on origin labelling of the ‘primary ingredient(s)’. The Single Market is the single best achievement for our industry, and FoodDrinkEurope is vigilant to make sure that companies can continue to benefit from frictionless trade across the EU. As respect for the rule of law is a fundamental principle in achieving this, FoodDrinkEurope decided at the end of 2017 to lodge a complaint to the European Commission against some Italian labelling decrees which were adopted bypassing key EU rules and procedures.

FoodDrinkEurope also provided input to the public consultation on a Commission Implementing Regulation on the origin indication of the primary ingredient of foods, which should put a halt to any further national initiatives on country of origin labelling which fragment the Single Market. FoodDrinkEurope closely monitored the implementation of Regulation 1129/2011.

CALL FOR ACTION TOGETHER FOR MORE BALANCED DIETS

Europe’s food and drink industry launches a Call for Action to help improve diets and promote good nutrition and health. Only by working together to improve diets can we make a difference. This is why we ask all interested parties and stakeholders to join forces and look ahead to tackle today’s societal challenges related to nutrition and health.

CONSUMER INFORMATION

Alongside healthy and active lifestyles, a balanced diet is key to good health.

It protects against non-communicable diseases such as obesity, diabetes, cardiovascular diseases, some types of cancer and skeletal conditions.

It contributes to well-being and physical health.
(EU) No 1169/2011 on the provision on food information to consumers in the Member States, assisting members and facilitating a harmonised interpretation and application of the EU rules. At the same time, the organisation actively participated in the discussions at EU and international level on issues related to consumer information, such as date marking and front-of-pack nutrition labelling.

NUTRITION AND HEALTH CLAIMS

In 2017, FoodDrinkEurope actively followed the on-going regulatory fitness (REFIT) evaluation of Regulation (EC) No 1924/2006 on nutrient profiles and botanicals, and submitted a contribution to the underlying study for this evaluation. FoodDrinkEurope intends to continue monitoring this evaluation, and is confident that this exercise will allow to adequately address the complex outstanding issues of nutrient profiles and botanicals.

ADDRESSING THE ISSUE OF ALLEGED “DUAL QUALITY”

The Single Market for food and drinks does not preclude diversity, as consumers in different regions may have different tastes and preferences and the availability of locally-sourced raw material may vary.

In this context, the food and drink industry takes recent allegations of “dual quality” very seriously, since companies consider all consumers across the EU as equal and wish to provide them with the best quality products that fit their preferences and expectations. Europe’s food and drink industry has been cooperating closely with the European Commission since this issue was raised at European level and has committed to open dialogue. To this end, FoodDrinkEurope has had regular meetings with Commissioner for Justice, Consumers and Gender Equality, Vera Jourova, and FoodDrinkEurope’s Director General, Mella Frewen interacted at the Summit “For equal quality of products for all”, which was held in Bratislava on 13 October 2017, with Prime Ministers of 6 EU Member States where concerns around the issue have been expressed.

The sooner the dialogue starts, the better. Gaining and maintaining consumer trust is our core value; our industry’s success is based on treating all consumers equally. We look forward to cooperating with the European Joint Research Centre to help develop a harmonised methodology to assess the alleged problem.

FoodDrinkEurope is contributing to expert meetings of the Commission’s Joint Research Centre (JRC) to develop a common EU-wide testing methodology, which – once applied at pan-European level – should provide a clearer insight towards fact-based evidence on this political issue. FoodDrinkEurope also represents the industry in the High Level Forum for a Better Functioning Food Supply Chain, where the issue is also discussed.

Political authorities in a number of Central and Eastern European Member States have alleged that the food and beverage products sold to consumers in their markets are of inferior quality compared to products sold under the same brand and packaging in Western European ones.

The Eat and Live Well website offers a wealth of information on how Europe’s food and drink sector puts in place initiatives to help consumers achieve a more balanced diet and better lifestyle, while still enjoying their food and keeping its social and traditional role.

What we eat and how we eat it is both a pleasure and an art. Let us continue to enjoy it and at the same time help tackle challenges related to health and nutrition.
BUILDING ON THE ESSENTIAL LINKS BETWEEN FOOD, PEOPLE AND THE PLANET

IMPLEMENTING THE UN SUSTAINABLE DEVELOPMENTS GOALS

FoodDrinkEurope and its members are firmly committed to continue to develop more sustainable practices and implementing the targets set within the UN Sustainable Developments Goals (SDGs) alongside strengthening the links between food, people and the planet.

In view of the High Level multi stakeholder platform kick off meeting in January 2018, FoodDrinkEurope launched in December 2017 a website showcasing, alongside its members, its commitment in implementing and achieving the SDGs. FoodDrinkEurope, and its Director General, was invited to become a member of the EU High level multi stakeholder platform on the SDGs, launched in December 2017. FoodDrinkEurope actively contributes to the discussions and actions in the platforms multiple sub-groups.

With the publication of the ‘Ingredients for a Circular Economy’ website and leaflet, FoodDrinkEurope emphasized the importance of raising awareness of what a circular economy means for the food and drink industry, how the industry delivers a more circular economy and what is needed moving forward. FoodDrinkEurope won the award for Best Association Publication at The European Association Awards 2017 for this work.

For this project FoodDrinkEurope was shortlisted as finalist in the European Excellence Awards in Public Affairs in the Food & Beverage category. As follow up to this work, FoodDrinkEurope has launched video case studies to demonstrate the usefulness and practicality of these guidelines and to illustrate how both large companies and SMEs are dedicated to food donation and redistribution.

FoodDrinkEurope also continued its meaningful contribution to the European Commission’s Platform on Food Losses and Food Waste. Earlier in the year, FoodDrinkEurope launched Preventing Food Waste, a new website platform presenting all industry actions in the area of food waste prevention and reduction.

FoodDrinkEurope’s ‘Every Meal Matters’ joint food donation guidelines were referenced in the EU Food Donation guidelines, launched in October 2017, as a good example of an industry led voluntary initiative on food redistribution.

Further underlining FoodDrinkEurope’s commitment to food waste prevention, the organisation was invited to become a ‘Friend of Champions 12.3’, a global coalition of executives from governments, businesses, international organisations, research institutions, farmer groups, and civil society dedicated to inspiring ambition, mobilizing action, and accelerating progress toward achieving SDG 12.3 by 2030.

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FoodDrinkEurope has throughout the year continued its proactive contribution to EU policy elaborations implementing the EU Circular Economy Action Plan and will continue to do so in 2018.

The recently adopted Commission Communication on a Plastics Strategy recognizes the relevance of packaging to ensure food safety and reduce food waste. Also the EU waste legislative review lead to the maintenance of the single market legal base of the Packaging and Packaging Waste Directive and positive outcomes on food waste prevention in the Waste Framework Directive.

**ENVIRONMENTAL FOOTPRINT**

In November 2017, FoodDrinkEurope came forward with the European food and drink industry’s recommendations on the possible future use of the EU Environmental Footprint Methodology.

The report summarises the food and drink sector’s key learnings at the current stage of the Product Environmental Footprint (PEF) process and aims to reflect on the industry’s experiences, and to provide insights in the context of the continuous evolution of environmental footprinting both in terms of policy and practical use.

**FOOD SCP ROUND TABLE**

The European Food Sustainable Consumption and Production (SCP) Round Table continued to develop further technical guidance on the ENVFOOD protocol horizontal topics. The Round Table delivered the food chain recommendations on how to further enable a more circular economy.

The report aims to explain what the Circular Economy means for the agri-food value chain by showing real examples, identify barriers and challenges, and to formulate recommendations both sector operators and policy makers.

**PRODUCT ENVIRONMENTAL FOOTPRINTING POLICY RECOMMENDATIONS**

| 1. | We would recommend a harmonised policy framework based on the PEF that is supported by industry. The policy framework should ensure that the use of PEF should be voluntary. |
| 2. | The policy framework should be flexible. The variety and complexity of food and drink products imply both significant initial costs and ongoing expenditure to perform environmental footprinting, particularly when products are reformulated and new products are developed. A flexible policy which would allow companies to decide what is most appropriate for their individual circumstances would be advisable. |
| 3. | In order to ensure consistency and comparability of results, the policy framework should apply life-cycle thinking from (even pre-) farm to fork/glass and beyond for food and drink products, with a view to enhance environmental performance along all food chain stages, including the consumption stage. |
| 4. | The policy framework should support the use of PEF as a diagnostic tool for identifying hotspots and promoting continuous improvement. PEF is not yet sufficiently developed to be used to compare one food product against another as it impinges a level playing field amongst products. |
| 5. | Given the importance of the food and drink sector for the European economy, its strong involvement in the PEF pilot tests – accounting for around half of the tests – and the environmental specifics existing within this broad sector, any policy discussions must continue to engage the PEF food and drink pilots in a public-private partnership. |
| 6. | The policy framework should help enhance Europe’s international competitiveness. Food and drink production operates within global supply chains. The policy framework must also improve the operation of the Single Market and should not constitute a distortion of competition or an unjustifiable obstacle to the proper functioning of the Single Market or to international trade agreements. |
| 7. | The policy framework should always take into account and promote innovation to improve the performance of products, including their environmental performance along the life-cycle. |
| 8. | The communication of any results to consumers or other stakeholders should remain voluntary and off-pack. It is vital that the information provided is verifiable, credible, scientifically reliable, comprehensive, clear, not misleading, and transparent, particularly in the absence of a PEFCR. |
| 9. | In terms of communication vehicles, given the high diversity of food and drink products and actors along the food chain, operators should be able to use the means and format of communication that is the most suitable and effective to support informed choice by the recipient of the information, including the use of digital technologies. |
| 10. | The PEF must be feasible for small and medium sized enterprises (SMEs) to use. For instance, due to a lack of resources, SMEs might be consequently disadvantaged. |

**INDUSTRIAL EMISSIONS DIRECTIVE**

FoodDrinkEurope has proactively provided its recommendations, throughout 2017, to the European Commission’s review of the Industrial Emissions Directive and the Best Available Techniques Reference Documents (BREF) for the Food, Drink and Milk sector and will continue to do so in 2018. The aim of this process is to set operating limits for manufacturing plants across the EU.

**CLIMATE CHANGE AND ENERGY**

Throughout the year, FoodDrinkEurope was actively involved in the legislative process of the recast of the Renewable Energy Directive. FoodDrinkEurope and its members agreed and disseminated a position paper in June and reached out to MEPs in November.

**PRODUCT ENVIRONMENTAL FOOTPRINT**

Product Environmental Footprint (PEF) is an EU-wide multi-criteria assessment of the environmental performance of a good or service throughout its life cycle. The main goal of the food and drink companies who decided to engage in the PEF pilot tests was to establish common rules in order to assess the environmental footprint of their products at European level.

**FOODSCP**

- FoodSCP Round Table
- continue to develop further technical guidance
- horizontal topics
- Round Table delivered food chain recommendations on how to further enable a more circular economy.

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GOVERNANCE AND STRUCTURE

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

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

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

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

FOOD AND CONSUMER POLICY COMMITTEE / FCP
The Food and Consumer Policy (FCP) Committee deals with issues related to food safety, research and innovation (including the European Technology Platform “Food for Life”) as well as consumer information, nutrition and health.

COMPETITIVENESS COMMITTEE / COMP
The Competitiveness (COMP) Committee’s main objective is to develop, coordinate and take an active part in actions aiming at improving the competitiveness of the European food and drink industry. In particular, it is active in horizontal issues such as SMEs, internal market, the High Level Forum and in more specific issues linked to the Common Agricultural Policy, trade, biofuels, derivatives and commercial relations.

ENVIRONMENTAL SUSTAINABILITY COMMITTEE / ESC
The Environmental Sustainability Committee (ESC) addresses issues such as sustainable production and consumption (including the Food SCP Roundtable), food waste, climate and energy and industrial emissions including water.

COMMUNICATIONS COMMITTEE / COMCOM
The Communications Committee (COMCOM) supports the work of FoodDrinkEurope on Reputation, coordinates and disseminates key messages and operates as a structure for exchange of information and best practices on communications issues.
COMMITTEES AND GROUPS
as of April 2018

FOOD AND CONSUMER POLICY

Consumer Info, Diet & Health /FCP1
- Consumer Information
- Claims
- Diet
- Strategic Tax
- GDA+
- Addition of Nutrients

Food Safety, Science, R&D /FCP2
- Food Safety Management, Feed & Hygiene
- Allergens
- Contaminants
- Process Contaminants
- Furan
- Ingredients
- Additives
- Phosphates
- Flavourings
- Enzyme
- Food Contact Materials
- Packaging Ink Joint Industry Task Force
- Novel Foods/GMO
- R&D
- Science
- Nanomaterials
- Nanomaterials Advocacy
- Mineral Oils

COMPETITIVENESS

Agricultural Policy
- Trade
- Procedures Import/Export

Better Regulation
- Commercial Relations
- Social Dialogue
- Economic Research & Analysis
- Biofuels
- Derivatives
- High Level Forum Industry Sherpas
- SME Champions Network

ENVIRONMENTAL SUSTAINABILITY

Climate & Energy
- Industrial Emissions
- Sustainable Food Systems
- Circular Economy
- Food Waste
- Corporate Social Responsibility

COMMUNICATIONS

Single Market
- Brexit

ETP ‘FOOD FOR LIFE’

Leadership team

COMMITTEE
- EXPERT GROUP
- TASK FORCE/AD HOC
- INACTIVE GROUP
BOARD OF DIRECTORS

President
Hubert Weber
Mondelēz Europe GmbH

Vice-President
and Treasurer
Frans Egberts
Heineken

Bernard Ducros
Danone

Gonzalo Guillén
Benjumea
Acesur

Chris Hood
Kellogg Company

Evangelos Kaloussis
Terra Creta S.A.

Vice-President
Wolfgang Heer
Südzucker AG

Vice-President
Marco Settembri
Nestlé S.A.

Silviu Popovici
Pepsico Europe

Malcolm Sheil
Kerry Europe & Russia

Jan Teplý
Madeta A.S.

Hanneke Faber*
Unilever NV

Antonio Ferraioli
La Doria S.p.A.

Robert Gibber
Tate & Lyle Plc.

Mehmet Tütüncü
Yıldız Holding A.S

Aldo Uva
Ferrero Trading Lux S.A.

Juha Vanhainen
Apatit Group
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 through its Committees and Expert Groups around four themes: food safety and science, nutrition and health, environmental sustainability and competitiveness.

**Secretariat**

Mella Frewen  
Director General

Dirk Jacobs  
Deputy Director General/Director of Consumer Information, Diet & Health

Beate Kettlitz  
Director of Food Policy, Science and R&D

Evelyne Dollet  
Director of Economic Affairs

Tove Larsson  
Director of Environmental Affairs

Régine Mynsberghe  
Office Manager

Louis Hinzen  
Senior Manager of Economic Affairs

Rebeca Fernandez  
Senior Manager of Food Policy, Science and R&D, EU Projects & ETP ‘Food for Life’ Secretariat

Caterina Gubbiotti  
Manager of Consumer Information, Diet and Health

Eoin Keane  
Manager of Food Policy, Science and R&D

Angeliki Vlachou  
Manager of Food Policy, Science and R&D

Sara Lamonaca  
Manager of Nutrition and Health

Francesca Bignami  
Manager of Economic Affairs

Lorenzo Ferrucci  
Manager of Sustainability & CSR

Patricia Lopez Blanco  
Manager of Environmental Affairs

Eleni Giannakaki  
Manager of Communications

Conor Mescall  
Manager of EP Relations & Communications

Maryline Crooijmans  
PA to the Director General

Laurence Moratello  
Secretary/Assistant of Consumer Information, Diet and Health & Environmental Sustainability departments

Sophie Margetis  
Secretary/Assistant of Food Policy, Science and R&D

Donata Nickel  
Secretary/Assistant of Economic Affairs

Daria Kuzmina  
Assistant Office Manager

Ekaterina Tsurkan  
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MEMBERS

NATIONAL FEDERATIONS

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 Udruga Poslodavaca
www.hup.hr

CZECH REPUBLIC
PKČR – Potravinářská Komora České Republiky
www.foodnet.cz

DENMARK
DI – DI Fødevarerindustrien
www.fi.di.dk

ESTONIA
ETL – Eesti Toiduainetööstuse Liit
www.toiduliit.ee

FINLAND
ETL – Elintarviketeollisuusliitto
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 Ernährungsindustrie
www.bve-online.de

GREECE
SEVT – Σύνδεσμος Ελληνικών Βιομηχανιών Τροφίμων
Federation of Hellenic Food Industries
www.sevt.gr

HUNGARY
ÉFOSZ – Elelmiszer-feldolgozók Országos Szövetsége
www.efosz.hu

IRELAND
FDI - Food Drink Ireland
www.fooddrinkireland.ie

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

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

NORWAY (OBSERVER)
NHO - Mat og Drikke
www.nhomatogdrikke.no

POLAND
PFPZ – Polska Federacja Proszowcow
Żywieniem Związku Pracodawców
www.pfpz.pl

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

ROMANIA
ROMALIMENTA – Federația Patronală din Industria Alimentară
www.romalimenta.ro

SLOVAKIA
PKS – Potravinárska Komora Slovenska
www.potravinari.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.fnli.nl

TURKEY (OBSERVER)
TGDF – Türkiye Gıda ve İçecek Sanayii Dernekleri Federasyonu
www.tgdf.org.tr

UNITED KINGDOM
FDF – Food & Drink Federation
www.fdf.org.uk
### EUROPEAN SECTORS

<table>
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<th>Sector</th>
<th>Association/Website</th>
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<tbody>
<tr>
<td><strong>BEER</strong></td>
<td>The Brewers of Europe <a href="http://www.brewersofeurope.org">www.brewersofeurope.org</a></td>
</tr>
<tr>
<td><strong>BOTTLED WATERS</strong></td>
<td>EFBW – European Federation of Bottled Waters <a href="http://www.efbw.eu">www.efbw.eu</a></td>
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<tr>
<td><strong>BREAKFAST CEREALS</strong></td>
<td>CEEREAL – European Breakfast Cereal Association <a href="http://www.ceereal.eu">www.ceereal.eu</a></td>
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<tr>
<td><strong>BROTHS &amp; SOUPS</strong></td>
<td>CULINARIA EUROPE – Federation of Associations and Enterprises of Industrial Culinary Product Producers in Europe <a href="http://www.culinaria-europe.eu">www.culinaria-europe.eu</a></td>
</tr>
<tr>
<td>**CHOCOLATE, BISCUITS &amp;</td>
<td>CAOBISCO – Association of Chocolate, Biscuit and Confectionery Industries of the European Union <a href="http://www.caobisco.eu">www.caobisco.eu</a></td>
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<tr>
<td>CONFECTIONERY**</td>
<td><strong>DAIRY PRODUCTS</strong></td>
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<tr>
<td><strong>DIETETIC PRODUCTS</strong></td>
<td>SNE – Specialised Nutrition Europe <a href="http://www.specialisednutritioneurope.eu">www.specialisednutritioneurope.eu</a></td>
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<tr>
<td><strong>FRUIT &amp; VEGETABLE JUICES</strong></td>
<td>AJIN – European Fruit Juice Association <a href="http://www.ajin.org">www.ajin.org</a></td>
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<td><strong>FRUIT &amp; VEGETABLE PRESERVES</strong></td>
<td>PROFEL – European Association of Fruit &amp; Vegetable Processors <a href="http://www.profel-europe.eu">www.profel-europe.eu</a></td>
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<td><strong>HONEY</strong></td>
<td>FEEDM – European Federation of Honey Packers &amp; Distributors <a href="http://www.feedm.com">www.feedm.com</a></td>
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<tr>
<td><strong>ICE CREAM</strong></td>
<td>EUROGLACES – European Ice Cream Association <a href="http://www.euroglaces.eu">www.euroglaces.eu</a></td>
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<tr>
<td>**INTERMEDIATE PRODUCTS FOR</td>
<td>FEDIMA – Federation of EU Manufacturers and Suppliers of Ingredients to the Bakery, Confectionary and Patisserie Industries <a href="http://www.fedima.org">www.fedima.org</a></td>
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<td>BAKERY &amp; CONFECTIONERY**</td>
<td><strong>Margarine</strong></td>
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<tr>
<td>**NATURAL SOY AND PLANT-BASED</td>
<td>ENSA – European Natural Soy and Plant Based Foods Manufacturers Association <a href="http://www.ensa-eu.org">www.ensa-eu.org</a></td>
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<td>FOOD**</td>
<td><strong>Pasta</strong></td>
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<td><strong>PET FOOD</strong></td>
<td>FEDIAF – European Pet Food Industry Federation <a href="http://www.fediaf.org">www.fediaf.org</a></td>
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<tr>
<td><strong>PROCESSED MEAT</strong></td>
<td>CUITRAV – Liaison Centre for the Meat Processing Industry in the European Union <a href="http://www.citrav.eu">www.citrav.eu</a></td>
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<td><strong>SNACKS</strong></td>
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<td><strong>SOFT DRINKS</strong></td>
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<tr>
<td><strong>SOLUBLE &amp; ROASTED COFFEE</strong></td>
<td>ECF – European Coffee Federation <a href="http://www.ecf-coffee.org">www.ecf-coffee.org</a></td>
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<td><strong>SPICES</strong></td>
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<td>spiritsEurope <a href="http://www.spirits.eu">www.spirits.eu</a></td>
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<td>CEFS - European Committee of Sugar Manufacturers <a href="http://www.cefs.org">www.cefs.org</a></td>
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<td><strong>TEA &amp; HERBAL INFUSION</strong></td>
<td>THIE – Tea &amp; Herbal Infusions Europe <a href="http://www.thie-online.eu">www.thie-online.eu</a></td>
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<tr>
<td><strong>YEAST</strong></td>
<td>COFALEC – Confederation of EU Yeast Producers <a href="http://www.cofalec.com">www.cofalec.com</a></td>
</tr>
</tbody>
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