

# NAVIGATING uncertain waters



As we enter the second half of 2025, Europe's political and market landscapes are shifting in ways that will directly affect savoury snack makers. **Sebastian Emig** considers how our sector can stay on course

**C**ONFUSED policy signals from Brussels, bitter debates over environmental legislation and a revised transatlantic trade framework have all been front-page news in recent weeks. Meanwhile, consumer tastes and shopping habits are evolving rapidly. For the more than 200 companies represented by the European Snacks Association (ESA), understanding these developments is essential. In this column, I'll unpack what's happening on the EU stage and within our market and outline how we can navigate these rough waters.

## THE GREEN CLAIMS FIASCO

In late June, the Commission's press office sent Brussels into a tailspin by declaring it intended to withdraw the Green Claims Directive, legislation designed to clamp down on misleading environmental claims. Within hours, officials insisted that they might not withdraw the proposal if Parliament and the Council agreed to exempt micro-enterprises. The contradictory statements, coupled with reports of infighting among commissioners, created the impression of an institution in disarray. Centrist and liberal MEPs were outraged, while far-right politicians crowed about the apparent collapse of 'anti-greenwashing' rules. By Monday, the Commission had officially backtracked: they would only withdraw the law if microenterprise exemptions remained.

This episode wasn't just a communications mishap. As the press in Brussels noted, the Green Claims file has become one of the most politically charged dossiers in Brussels, exposing rifts within the centre-right European People's Party (EPP) and highlighting the rise of an alternative majority that cuts across traditional pro-European lines. Negotiations started in January and were abruptly cancelled when the Commission

announced its withdrawal plan. Why the sudden U-turn? Some suggest that it reflected pressure from the EPP, which argued that existing consumer empowerment rules already address greenwashing and warned of burdens on businesses. Others believe it was a tactical move to delay further confrontation on the Green Deal.

## A GREEN DEAL IN LIMBO

If the Green Claims saga feels chaotic, it's because it sits against a broader backdrop: the quiet dismantling of the EU's Green Deal.

In recent months, the Commission has bundled multiple legislative files into 'omnibus' simplification packages that water down climate rules and limit schemes such as the Carbon Border Adjustment Mechanism. A senior diplomat quoted in Brussels media said there's "almost a sense of embarrassment whenever files from the previous mandate pop up," adding that no one is championing the Green Deal. The result is legislative limbo: no push to enact the directive and no ownership to scrap it.

Commentators liken it to an Italian summer game called *Splash Out*, in which a water balloon is passed around until the timer runs out and someone gets soaked. That's how the Green Claims Directive is being treated: everyone knows it will explode, but no one wants to be holding it when that happens.

The EPP asked the Commission to withdraw the bill, passing the 'balloon' back to the executive. Following public backlash, the Commission referred the matter to the Council, stating that withdrawal would only occur if national ministers withdrew a controversial amendment.

All this muddle underscores a troubling reality: the EU's sustainability agenda has lost momentum. ►

## A TRANSATLANTIC TRADE SHOWDOWN

As Brussels wrangles over the Green Deal, another drama is playing out: America's tariff threats and Europe's response. In late July, Commission President Ursula von der Leyen rushed to Scotland to meet Donald Trump. Hours later, news broke that the EU had agreed to a 'deal': accept a 15 % tariff on EU exports to the USA, commit to buying US liquefied natural gas and invest billions in American industries. These concessions came after Trump threatened to impose punitive duties of 30% or even 50% on EU goods. Critics called it a capitulation that undermines World Trade Organisation rules. Even MEPs from the EPP warned that a 15% baseline tariff would be "a blatant breach of WTO principles and a serious blow to European industrial competitiveness."

Weeks earlier, Brussels pundits had warned of a make-or-break moment. Trump had sent von der Leyen an 'impertinent' letter threatening 30% tariffs unless the EU surrendered. Germany's political leaders were divided; some urged a 'quick and dirty' deal, while others demanded that the Commission activate countermeasures.

French President Emmanuel Macron argued the EU should "resolutely defend European interests" and prepare credible retaliation if no agreement is reached. Yet if Europe retaliates, it risks escalation; if it surrenders, it accepts an illegal tariff and sets a precedent for Washington to dictate EU legislation. This dilemma is not academic. Our sector relies on open markets, both for importing ingredients such as nuts and oils, and for exporting European snacks worldwide. Tariff hikes could squeeze margins and disrupt supply chains overnight.

## CONSUMER TRENDS AND RETAIL SHIFTS

While EU politicians play Splash Out, consumers across Europe and North America are quietly adjusting their snacking habits, and grocers

find themselves at the centre of a snacking shift.

Over the past year, supermarkets captured nearly 160 million snack unit sales from competitors, including convenience and drug stores. At the same time, they lost 56 million units to club and mass merchandisers as shoppers sought lower prices and larger pack sizes. Consumers are buying snacks less often (42 % say they're cutting back) and prioritising multipacks and family-size bags to save money. The shift is good news for grocers who specialise in larger packages, but bad news when those purchases move to club stores, where 90% of grocers' lost unit sales have gone.

The shift also highlights opportunities. Eighty per cent of surveyed shoppers said private label snacks are as good as – or better than – named brands, and Gen Z has a particularly optimistic view. E-commerce is booming, with nearly 300 million snack units moving online during the same period. For ESA members, these trends point to the need to invest in private label partnerships, optimise pack sizes and strengthen digital sales strategies. They also suggest we can capture share from convenience and drug channels by focusing on value and convenience.

For European producers, these insights suggest that our market will continue to evolve in similar ways: premiumisation for some, affordability for others; functional and protein-rich savoury items; and innovation in flavours and formats. Our category stands at the intersection of indulgence and wellness – a balancing act we've already begun to master.

## SHAPING, NOT WAITING

There's a temptation to watch these political dramas from the sidelines and hope they don't affect us. But as the past months have shown, events in Brussels and Washington can quickly cascade into our factories, supply chains and sales channels. Whether it's a greenwashing directive that complicates marketing claims or a tariff that raises input costs, the consequences are real.

At ESA, we believe the savoury snacks sector should shape history, not be shaped by it. That means engaging with policymakers early, urging science-based regulation and staying nimble in our operations. It also means celebrating the resilience and creativity of our industry, from reformulating products to meet health goals to exploring AI-driven innovations. While the Green Deal may be in limbo and trade tensions may persist, consumers still want delicious, sustainable snacks. If we keep our finger on the pulse of political developments and consumer trends, we can continue to delight snack lovers across Europe and beyond.

As we note in our annual Snapshot of the industry on p28, we are entering a period of change that presents both risks and opportunities. By staying informed, collaborating across the value chain and speaking with one voice, Europe's savoury snacks community can ensure that our sector not only survives but thrives. ■



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\*in his capacity as permanent representative of Prime Consulting BXLBCN SL



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