

# Navigating choppy waters



Shifting nutrition narratives, trade uncertainty and a changing global order are transforming the operating environment for Europe's food manufacturers, writes **Sebastian Emig**

**A**S we move deeper into 2026, it is becoming increasingly clear that Europe's food manufacturers' operating environment is being reshaped on several fronts at once. Nutrition debates are intensifying, trade relations are becoming more transactional and the rules-based framework that has long underpinned global commerce is under growing strain.

For the savoury snacks sector, a highly integrated, innovation-driven part of Europe's food ecosystem, these developments are not abstract. They influence consumer expectations, investment decisions, supply chains and market access. The question is not whether change is coming, but how we respond to it.

## GLP-1S AND THE HEALTH DEBATE

Few topics illustrate the shifting nutrition landscape better than the rapid rise of GLP-1 weight-management medications. Initially framed as a disruptive force for food demand, the narrative is now evolving. Emerging evidence suggests that weight regain after treatment is common, bringing renewed attention to long-term dietary habits, lifestyle balance and the role of everyday foods.

This matters for our sector. It reinforces a point we have long made: there are no sustainable shortcuts to health. Food choices remain central, not only during weight loss but – crucially – afterwards. In that context, simplistic “good versus bad” food narratives do little to serve consumers or policymakers, especially in the debate about so-called ultra-processed foods.

For savoury snacks manufacturers, this moment presents both a responsibility and an opportunity. Reformulation efforts, portion control, transparent labelling and innovation in functional and better-for-you products are

not reactions to a trend. They have been, and remain, part of a longer trajectory towards meeting consumers where they are. Snacks are consumed in real lives, not clinical settings. They must fit into balanced diets that people can maintain over the long term.

At the same time, we should be cautious about policy reflexes that treat pharmaceutical developments as justification for renewed pressure on specific food categories. Health outcomes are shaped by patterns of consumption, education and access, not by shaming, stigmatising, or even demonising individual products. A science-based, proportionate approach remains essential.

## TRADE POLICY IN AN AGE OF UNCERTAINTY

While nutrition debates evolve, the external environment for European food producers is becoming more volatile. Recent developments around transatlantic trade, including renewed tariff threats and legal uncertainty surrounding major trade agreements are a reminder that open markets can no longer be taken for granted.

For a sector that depends on imported ingredients, specialised machinery, global sourcing and export opportunities, this matters deeply. Trade is not an abstract geopolitical concept; it is a daily operational reality. When trade becomes a tool of pressure rather than cooperation, costs rise, consumers' insecurities increase, planning horizons shrink and resilience is tested.

Europe has long benefited from a predictable, rules-based trading system. That system is now under visible strain, challenged by bilateralism, legal disputes and a growing tolerance for economic coercion. For food manufacturers and suppliers, the implications are clear: supply chains must be diversified, risk ▶

management strengthened and engagement with policymakers intensified.

At the EU level, it is essential that trade policy remains anchored in transparency, reciprocity and legal certainty. Agreements must be robust, defensible and aligned with Europe's long-term strategic interests, including food security and industrial competitiveness. Legal ambiguity and stop-start trade initiatives undermine confidence at a time when stability is most needed.

### A BROADER SHIFT

Taken together, these trends point to a broader shift. We are operating in a world where certainty is diminishing, narratives are polarising and long-established frameworks are being questioned. In such an environment, food manufacturers are often pulled into debates that extend far beyond their core activity: from public health to geopolitics.

Yet the food sector, including savoury snacks, remains one of Europe's most resilient industrial pillars. It combines scale with adaptability, tradition with innovation. Across the value chain, companies are

investing in automation, digitalisation, sustainability and workforce skills; often while navigating rising input costs and regulatory complexity.

This resilience should not be underestimated. Nor should the sector's capacity to contribute constructively to policy debates. Whether on nutrition, sustainability or trade, our credibility lies in being evidence-driven, pragmatic and solutions-oriented. We do not argue for the absence of rules, but for rules that work. We need rules that incentivise innovation, provide clarity and recognise economic reality.

### CONFIDENCE GROUNDED IN ACTION

Looking ahead, there are reasons for confidence. The savoury snacks sector has repeatedly shown its ability to adapt without losing sight of consumer enjoyment, cultural diversity and product quality. The current moment calls for the same qualities: calm analysis, constructive engagement and a refusal to be drawn into false binaries.

GLP-1 medications will not replace

the need for balanced diets. Trade tensions will not eliminate the value of cooperation. And uncertainty, while challenging, does not negate the strength of a sector that understands its responsibilities and its role.

As ESA's Director General, I remain convinced that our industry's greatest asset is its capacity to evolve thoughtfully, guided by science, grounded in reality and attentive to consumers' changing lives. By staying engaged, united and forward-looking, the savoury snacks community can continue to thrive, even as the broader landscape shifts around us. The times may be complex, but our direction does not have to be. ■



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