

# SHAPING the FUTURE



Europe stands at the cusp of a new political and industrial era - one that is reshaping everything from food systems and global trade to digitalisation and sustainability expectations. In such a fast-changing context, the European savoury snacks sector is not merely adapting - we are helping to shape the future, write **Sebastian Emig**

**R**EPRESENTING more than 200 companies across Europe through the European Snacks Association (ESA), I have the privilege of engaging daily with manufacturers, suppliers, regulators and visionaries who are driving progress in this dynamic sector. Today, I want to reflect on where we stand as an industry—and where we are headed.

## AGILE, AMBITIOUS, ADAPTIVE

The savoury snacks industry in Europe continues to grow steadily, propelled by consumer demand for quality, taste, convenience and, increasingly, health-conscious and sustainable options. We are seeing unprecedented innovation in the areas of reformulation, better-for-you products, protein-rich alternatives and novel ingredients. The marriage of culinary creativity and cutting-edge food tech is enabling our sector to offer products that align with the evolving lifestyles and values of consumers.

The recent surge in the application of artificial intelligence (AI) across food manufacturing is already revolutionising our operations. AI is optimising everything from energy efficiency and raw material usage to

product consistency and line maintenance. But while these technological strides are impressive, they also require robust frameworks to ensure that safety, data integrity and trust are maintained.

At the same time, we cannot ignore the pressures we face. Global trade tensions, inflation, unpredictable supply chains and a shifting EU regulatory landscape all pose significant challenges for our members. But with challenge comes opportunity—and the European snacks industry is more than ready to seize it.

## SIMPLIFICATION AND UNCERTAINTY

Regulation is one of the defining issues of our time, or should that be the simplification of regulation (some would call it even de-regulation)? The European Union has long prided itself on setting global benchmarks for food safety, sustainability and transparency—the so-called ‘Brussels Effect’. Yet, as recent policy shifts have shown, this influence is not guaranteed.

The EU’s recent turn towards simplifying regulation, underpinned by the Competitiveness Compass and its move toward omnibus legislation, is sending

mixed signals to our industry. While simplifying administrative burdens is a welcome ambition—particularly for SMEs—we must be cautious not to undermine predictability, investment certainty, or the integrity of the EU’s sustainability framework. The shift from ‘green’ to ‘clean’ in the Commission’s policy language must be watched carefully. A narrow focus on industrial competitiveness at the expense of environmental ambition would be a short-sighted move. Sustainable production is not a burden—it’s a business case. The companies leading the way in climate-smart innovation are not only doing the right thing; they are also positioning themselves as market leaders.

Rolling back key initiatives such as the Corporate Sustainability Reporting Directive (CSRD) or sustainable finance taxonomy before they are even fully implemented threatens to erode business confidence and derail green investment. It also raises questions about Europe’s long-term credibility as a rule-maker.

ESA has always supported smart, science- and evidence-based regulation. What we need now is clarity, consistency and co-creation, with guidelines that ensure ►

predictability and confidence for business. We urge policymakers to engage industry early in the legislative process and avoid sudden U-turns that destabilise progress. We will continue to support science-led sustainability pathways and work closely with EU institutions, NGOs and researchers to guide sectoral progress. We are particularly engaged in discussions around sustainable agriculture, packaging circularity and environmental labelling.

## NEW RISKS, NEW RULES

In the broader geopolitical context, recent developments—such as the return of President Trump to the White House and renewed transatlantic tensions—add further complexity to our operating environment. The EU's agriculture and food sectors are bracing for higher tariffs and rising protectionism. With populist shifts in both Europe and America, our members face increasing volatility and fragmentation in global trade.

One of the most impactful developments was surely the on-again/off-again application of new tariffs.

In March, the USA started applying a 25% tariff on steel and aluminum, including some derivative products, from a number of countries, as well as the EU. That certainly threw some clogs into our machine and the Commission responded by announcing that it will introduce countermeasures in two steps.

First, the Commission allowed the suspension of existing 2018 and 2020 countermeasures against the US to lapse. These countermeasures target a range of US products that respond to the economic harm done on €8 billion of EU steel and aluminum exports – and include a range of agricultural raw materials, ingredients and drinks. Second, in response to new US tariffs affecting more than €18 billion of EU exports, the Commission devised a package of new countermeasures on US exports following a consultation of Member States and stakeholders.

The new measures were set to come into force by mid-April, before Trump abruptly U-turned and announced that he would pause some of his highest tariffs for 90 days, leading the EU to suspend its own retaliatory 25% tariffs on US goods for 90 days, taking us to July. Trump's 25% tariffs on steel, aluminium and cars remained in place throughout.

Ursula von der Leyen said: "We want to give negotiations a chance. If negotiations are not satisfactory, our countermeasures will kick in."

If they eventually go ahead, the EU countermeasures could apply to US goods exports worth up to €26 billion in total, matching the economic scope of the paused US tariffs. The Commission indicated its willingness to find a negotiated solution that avoids an escalation in the trade conflict. Many agri-food categories are included, among which almonds are the most relevant for our sector. Almonds are the second-most-traded agri-food commodity between the USA and the EU after soya beans.

As the chaos began to unfold, the Secretariat immediately engaged with other affected sector associations to align on potential actions and share information. We contacted various MEPs from INTA committee ahead of an exchange with trade Commissioner Maroš Šefčovič on the EU response to US trade policy and sent a joint letter to Commissioner Šefčovič.

One outcome of our actions was that the tariffs on almonds are not supposed to kick in until 1 December, unless the USA agrees to a fair and balanced negotiated outcome. We will continue to advocate for fair, transparent trade that upholds the high standards of the European market. Mirror clauses, level playing fields and science-based negotiations must remain non-negotiable pillars of any future trade deal.

## WHAT LIES AHEAD: SNACKEX 2026

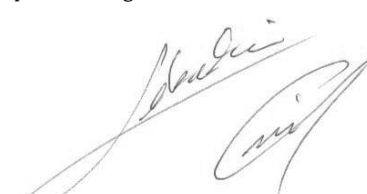
Looking ahead, we are preparing for our next edition of SNACKEX—Europe's leading trade fair for the sector—which will once again bring together the brightest minds and most exciting innovations in the snacks ecosystem.

More than ever, SNACKEX is a platform not only for business deals, but for strategic thinking. It's where manufacturers meet their providers, where startups pitch sustainable ingredients, and where global trends are discussed in local context. I warmly invite all stakeholders—from across Europe and beyond—to join us and be part of the conversation.

## CONCLUSION: SHAPING, NOT WAITING

Europe's savoury snacks sector is strong, innovative and resilient. But we cannot afford to be passive observers of the changes reshaping our world. Whether the issue is regulatory clarity, digital transformation, or sustainability, we must lead—not wait. As one thought-provoking article recently put it, 'Either you shape history—or history shapes you'.

At ESA, we are committed to shaping the future—with our members, our partners and our regulators. Because in times of uncertainty, one thing remains true: collaboration is the most powerful ingredient we have. ■



**Director General Sebastian Emig\***

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

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