



Helping the savoury snacks industry succeed

ANNUAL REPORT & REVIEW

2017–18

OUR MISSION

- Promote the development and understanding of the European savoury snacks industry
- Provide technical expertise and input to EU policy and decision makers
- Be the voice of the European savoury snacks industry in the EU public debate
- Provide a platform for sector-wide co-operation on non-competitive issues in full compliance with the limits imposed by antitrust laws.

THE INDUSTRY WE REPRESENT

The European savoury snacks sector is one of the top performers among the European food and beverage industry. The dissolution of traditional eating patterns and the trend towards grazing is helping the sector to continue to thrive and grow.

With consumers looking for more personalisation in products and services and the right snack at the right time and occasion, the European savoury snacks industry is at the focal point of consumers' needs. Our industry is constantly evolving and is often ahead of the curve: the latest fad being protein-rich foods. Our sector is already there and meets with a wide range of products the consumers' desires. Need a handy and quick energy boost on your way to work? No problem. Nuts, seed mixes, jerky, breadsticks, crisps - all readily packaged in single-hand pouches that allow you to continue reading your newspaper online or checking your twitter feeds.

Our industry, being very adaptable to changing consumer demands, and producing exciting, indulgent, convenient

and affordable treats, needs to keep abreast with policy-making at both national and European level. And the pressure from the legislative side has been increasing in recent years; especially relating to topics such as food product reformulation, marketing to children, food safety regulation and discriminatory food taxation.

We, at the European Snacks Association, with an international membership of over 200 companies that represent the entire value chain, are here to help members to successfully operate in a complex marketplace, promoting the safe and nutritious nature of our products, whilst seeking to promote the development and understanding of savoury snacks at EU level and providing technical expertise and input to EU policy and decision makers.



President's review

SAVOURY SNACKS CONTINUE ON A SUCCESSFUL MISSION



Having completed my first year as ESA president it is a pleasure and privilege to inform our members that our association, with the great support of all its members and its secretariat, managed to bring home substantial wins for our industry, and I would like to highlight here two.

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Based on scientific data and a sound and collaborative approach we managed along with other sectors to convince the European Commission to implement legal mitigation measures for the process contaminant acrylamide, which are already used by our member companies voluntarily for more than a decade and which helped to reduce the substance enormously in finished products. In doing so, we were also able to avoid the implementation of maximum limits which, due to the nature of raw materials used and unpredictable seasonality, would have imposed an unjustified business impact on our sector.

A second tremendous win for our industry was the case of blanched peanuts. At the World Customs Organization (WCO) level there were discussions to treat blanched peanuts as processed peanuts, rather than raw ones as before. With the help of members, the ESA team prepared a solid and profound case study based on scientific arguments and reflecting business reality, which helped inform the debate at WCO level and convinced member countries to opt for the status quo. This decision alone saved the savoury snack nut industry, and other nut processors in the confectionary industry, many millions of euros.

Besides these 'hard' wins our team in Brussels is continuing to create and maintain a positive mindset about our industry by promoting the achievements of our sector in terms of product

reformulation or responsible marketing, and it maintains trustful and constructive relationships with key stakeholders.

All of the above is only possible with members providing the ESA team with information. This helps them to substantiate our messages and requests, and make our voice heard in relevant political debates. Furthermore, your participation in all ESA working groups is vital and very much appreciated. This involvement is the basis for effective and sustainable advocacy that helps our industry excel among other food sectors.

Last but not least, as our third leg on which ESA stands, I would like to highlight the tremendous outcomes of the 2017 SNACKEX. This was by far the best and biggest show in ESA's lifetime and the positive feedback was overwhelming. With such a great event under our belt, we are looking very confidently forward to the next one in Barcelona next year.

I want to thank you all for your ongoing support, as well as the entire ESA secretariat for their tireless commitment and engagement.

A handwritten signature in black ink that reads "Valentina Maglio".

Valentina Maglio
President
European Snacks Association

The year ahead

DIRECTOR GENERAL'S INSIGHT

Looking into the future always starts with a brief look into where we are coming from. The last year proved challenging for ESA to say the least; however, with the strong support of our members and my very capable team in the secretariat it was another one for the books. ESA nearly single-handedly fended off potentially severe regulatory measures (including two outstanding achievements: quite favourable benchmark levels for acrylamide and the retention of blanched peanuts in the zero tariff rate) that would have tremendously impeded members' business; the best SNACKEX ever and an ever-increasing positive presentation of our industry towards European policy and decision makers.



Our sector is at the epicentre to provide nutritious and indulgent treats. Whatever flavour, shape or texture consumers will look for, our members will be ready to deliver

Brussels power play is shifting

What are we looking at in the next 12 to 18 months? At the Brussels' level we will see the current European Commission and European Parliament both ending their terms. A time during which usually not a lot is going on in terms of new legislation, but more with the strategic positioning of Commission staff for the potential new roles and members of the European Parliament getting ready for re-election in their local constituencies.

You might want to think: well, calm times ahead and easy swimming. Au contraire, I say. Why? Because we have seen member states' governments taking over more and more action while the Commission seems to have become quite complacent. A vivid example was when the Italian government announced a few months ago a law for mandatory country of origin labelling – clearly against single market rules – and the Commission avoided any sort of conflict; hence, potentially endangering the single market.

Hence, other member states will harness this power vacuum to fill it with their own ideas and approaches, which, in turn, might impede further business in between countries. This could turn into specific labelling rules, discriminatory food taxes, benchmark or maximum limits for nutrients in foods, stricter advertising rules or more. On top of all this a big question mark remains with the potential exit of the United Kingdom from the European Union. Many companies from all sectors are dreading the fact that there seems to be hardly any progress in handling this first-time event; hence business predictability is eroding with every month without a clear vision – with many fearing for a hard Brexit.

These are just a few cornerstones for the political-regulatory environment. What kind of changes will the food industry itself and especially our sector face? I think that the food industry will experience some big shifts in 2018.

Adoption of new processes and techniques, novel technologies and new regulatory requirements are all going to challenge current methods of creating new products, marketing those and ensuring the safety from farm to fork. The food industry needs to be prepared to adapt quickly and efficiently, especially as these changes will accelerate rapidly. The past year has already set the table for these advancements: novel technologies such as the Industrial Internet of Things and sensor data that propelled precision agriculture are being increasingly introduced further downstream in the food system. Blockchain technology promises to make supply chains more transparent and traceable. Targeted next-generation sequencing has allowed industry to adapt to changing definitions of food and better ensure quality and identify risks in a more efficient and thorough way than ever before. And all this under the wary eyes of the more and more engaged and volatile expectations of consumers.

Innovation is impacting nearly every aspect of the food industry, and it is no longer just start-ups that are disrupting the landscape. From Walmart's blockchain initiative with IBM and Nestlé's efforts to tackle food waste, to the many repercussions of Amazon's acquisition of Whole Foods, major brands and retailers are taking big calculated risks when it comes to how they distribute, manufacture and market food. 2018 will be a definitive year for how industry begins addressing these changes. It will be increasingly important to not just lament the latest regulation, but rather get ahead of the changes and advocate for intelligent regulatory conversations and frameworks. The ability to adapt to new technology and even the messaging and positioning around these advancements, will define the future of food. Food is going increasingly digital, and data science, computer vision, robotics and bioinformaticians are going to be an increasingly big story in the food system.

2018 will be a watershed year for the food industry and presents a massive opportunity to optimise and scale how industry feeds the world's populations.

The nutrition landscape has never been more exciting – or complex

The way that consumers define nutrition is ever-changing. As they look for new and different benefits from the food they eat, their voices are growing louder as they demand more from food brands. How they eat has changed, too, as the lines between meals and snacks are continuing to blur. Consumers want – and need – their snacks to deliver more.

Consumers are overwhelmed, however, by the fads and trends that constantly pop up in the media and in the grocery store. Many are unsure of what information is true and what is actually right for them. From low-fat and low-carb to gluten-free and paleo, it is no wonder they aren't always confident in their food choices. And in our fast-paced, always on-the-go society, consumers don't necessarily have the time to keep up with – or even understand – the latest consumer trends, let alone put them into practice by preparing a meal or snack themselves. I think here our sector is at the epicentre to provide nutritious and indulgent treats. Whatever flavour, shape or texture consumers will look for, our members will be ready to deliver.



Sebastian Emig
Director General*
European Snacks Association

*in his capacity as permanent representative of PrimeConsulting BXLBCN SL

POTATO & CEREAL SNACKS



The EC Regulatory Working Group (ECR) continued to fulfil its mission of protecting and promoting the interests of the savoury snacks industry across many key areas – ranging from acrylamide to 3-MCPD and glycidyl esters, and from flavourings to plant protection products.

Acrylamide

2017 witnessed the finalisation of the European Commission's proposals on acrylamide, with regulation (EU) 2017/2158 published in the Official Journal of the European Union on 21 November 2017. The regulation applies from 11 April 2018.

In line with ESA's long-standing position, the regulation introduces mandatory codes of practice for manufacturers of certain food products, including sliced potato and formed crisps (chips). These codes are based upon existing best practice, which have previously been listed within the voluntary FoodDrinkEurope (FDE) acrylamide toolbox.

Manufacturers are now legally required to apply the codes of practice as part of their existing food safety management system and should be able to demonstrate how they are controlling their supply chain and production processes as regards acrylamide.

Manufacturers are assisted in this task by the existence of benchmark levels, which are listed in an annex to the regulation. An evolution of the previous indicative values, benchmark levels are simply performance indicators to be used to verify the effectiveness of the application of the mitigation measures. They are based upon occurrence data for broad food categories and have been established by the Commission at a level

which is approximately 10 to 15% lower than the mean values recorded within the latest EFSA datasets.

The new benchmark levels are very challenging for the sector. However, the Commission has acknowledged that for some foods there may be specific production, geographic or seasonal conditions or product characteristics which, despite the application of all relevant mitigation measures, will impact on a manufacturer's ability to meet the levels. Nevertheless, in such situations, the food business operator should still be able to show evidence that they have applied all relevant mitigation measures.

Complementary to the regulation, the Commission has also committed to work with EU member states to consider whether it is practical to establish maximum levels for acrylamide in certain foods. We expect this debate to still take some time, however the discussions may also be coloured by results of monitoring, from member states, activists and NGOs.

To this end ESA continues to collect anonymised acrylamide occurrence data from industry and has provided these data to scientists and to the European Food Safety Authority (EFSA) to aid analysis. In September 2017, 'Acrylamide Levels in Potato Crisps in Europe from 2002 to 2016' was published as a peer reviewed paper in the Journal Food Additives and Contaminants. This is a follow-up to the paper published in 2013.



ESA has continued to closely cooperate with the various associations representing the European potato supply chain and to seek support for the re-authorisation of the active ingredient chlorpropham (CIPC), an essential tool for sprout suppression that enables a consistent supply of quality potatoes and derived products year-around

Utilising 73,863 test results, the paper shows a reduction in acrylamide levels in sliced potato crisps over time, but also demonstrates seasonal and year-on-year fluctuations, and variance across different EU regions.

ESA will continue to work on supporting materials for the sector in 2018-2019.

3-MCPD and glycidyl esters

In May 2016 EFSA published its scientific opinion on the safety of the process contaminants 2-MCPD, 3-MCPD, glycidyl and their fatty acid esters. Whilst proposals for maximum levels for glycidyl in oils have progressed and are expected to be published in the Official Journal of the European Union in 2018, proposals for 3-MCPD and its esters have stalled.

Following a report by the Joint WHO/FAO Committee on Food Additives (JECFA) in November 2016, which increased the tolerable daily intake (TDI) 3-MCPD and its esters, EFSA undertook to review its opinion. In January 2018 it published a revised opinion which established a TDI of 2 µg/kg bw per day. EFSA reported that this TDI is not exceeded by the adult population, however a slight exceedance was observed in 'high consumers' within the younger age groups and for infants receiving formula only. It's not yet clear how this will affect the Commission's proposals for regulation in this area, but it is thought unlikely that maximum levels will be pursued for individual foods such

as savoury snacks. However, maximum levels may still be pursued for oils and for foods for infants. ESA continues to monitor the work and the development of various code of practice, including at Codex Alimentarius level.



Plant protection products

Issues with renewal of key active substances and swift reductions of maximum residue levels (MRLs) - with virtually no time for the industry to adjust - are unfortunately frequent.

ESA has continued to closely cooperate with the various associations representing the European potato supply chain and to seek support for the re-authorisation of the active ingredient chlorpropham (CIPC), an essential tool for sprout suppression that enables a consistent supply of quality potatoes and derived products year-around. Data gaps are currently being addressed by the applicant and follow-up discussions will

take place at the Standing Committee on Plants, Animals, Food and Feed within the first quarter of 2018, which will determine the next steps to take.

In August 2017, the Commission renewed the approval of maleic hydrazide setting the maximum level of impurity hydrazine at 1 mg/kg in the technical material until 1 November 2018, and 0.028 mg/kg onwards.

Concerns emanating from the lack of appropriate transitional periods are a cross-cutting issue - an account of ESA's actions in this area is included under the Nut Processors Working Group section.

Flavourings

The sector confronted a big challenge in July 2017 as safety concerns of the flavouring substance 4,5-epoxydec-2(trans)-enal (epoxydecenal) were raised by EFSA, leading to its removal from the EU Union list. The use of the urgency procedure meant neither a transition period nor the opportunity to sell out the stock were granted. Furthermore, delayed access to information from suppliers affected several companies who struggled to verify the presence of the substance in their seasoning mixes. Despite the efforts carried out by ESA, together with FoodDrinkEurope, we were unable to secure a transition period. The ECR is therefore focusing on measures to prevent a similar case in the future in collaboration with the European Flavour Association (EFFA).

COMMUNICATIONS

Nutrition and health issues have continued to generate headlines in Brussels and elsewhere in Europe, often with their fair share of controversy, be it on discriminatory taxation, front-of-pack labelling initiatives or marketing to children. The increasing trend towards unilateral action, impacting on the functioning of the single market, has also emerged as one of the biggest concerns for the entire European food and drink industry, as well as for our sector.

The COMMS group has paid close attention to these developments and acted to bring the issues to the forefront of policy-makers' concerns with a successful awareness raising event in the European Parliament in November 2017.

Discriminatory food and drink taxation on the rise

This year has witnessed several member states proposing and introducing new fiscal policies, promoted as a cost-effective form of intervention by the World Health Organization (WHO), in an attempt to curb rising levels of noncommunicable diseases including obesity.

The focus of public authorities for the past few years has been on sugar, but this year we have also witnessed attempts to extend the scope of fiscal policies to other nutrients, for example in Portugal where the government proposed a tax on salty products but which was eventually voted down by the Parliament.

Anticipating the political swing, the COMMS group has developed a new infographic aimed at busting myths around savoury snacks and salt, highlighting the minor contribution of our products to average dietary salt intake in the EU, as well as the reformulation efforts undertaken in the past decade. Discriminatory taxation is likely to continue as a source of concern in the years to come and the secretariat will remain vigilant in addressing upcoming developments.

Growing concerns about alleged 'dual quality' of foods sold in the European Union

2017 was also marked by turmoil over the quality of foods sold under the same brand in different member states, with the allegation that Eastern European consumers are often offered lower quality

products in comparison to their Western counterparts.

Despite no real evidence of negative bias towards foods sold on Eastern European markets, the topic has become very emotional and therefore highly political with several heads of state as well as Commission's President Jean-Claude Juncker entering into the debate. The COMMS group will continue to monitor the situation in 2018 where legislative actions might re-ignite the controversy. As far as our sector is concerned, we will continue to maintain our position that, whatever the recipe, our products always meet the highest standards.

Raising the profile of the savoury snacks industry

The ESA secretariat has continued to engage with policy-makers to inform and discuss the role and responsibility of the sector in relation to nutrition and health. The secretariat held several fruitful exchanges and meetings with prominent members of the European Parliament (MEPs) and officials from the European Commission's DG SANTE, where ESA utilised the opportunities to share the views of the sector and showcase achievements in terms of product improvement, information to consumers and responsible marketing to children. In June 2017, the secretariat hosted its fourth edition of the outdoor event Share-a-Snack in the crowded Place Luxembourg in front of the European Parliament. Visitors, many of whom work in the Parliament and related institutions, were invited to test their knowledge on

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savoury snacks in a short online quiz which allowed us to share information about our sector in an interactive and entertaining way.

Another high point was ESA's participation, one week later in July 2017, at the annual garden party of the European Parliamentary Association in Strasbourg. With around 300 attendees, including numerous MEPs, ESA took the occasion to showcase savoury snacks from various EU markets. Most importantly the event provided an exceptional opportunity to engage MEPs in informal discussions as they displayed their curiosity about the products, different textures and flavours.

Later in 2017 with the support of prominent German MEP Renate Sommer, ESA organised a flagship stakeholder event in the European Parliament.

Ten years after the publication of the European Commission's white paper on a Strategy for Europe on nutrition, overweight and obesity-related issues, stakeholders discussed lessons learned and ways of building consensus on effective future policy.

EU Pledge members reinforced their commitments to advertise responsibly to children

ESA Pledge members once again demonstrated their responsible approach to advertising to children with a very high level of compliance to the EU Pledge commitments, both on TV advertising, company-owned websites as well as for the first time, social media profiles.

More importantly, EU Pledge members managed to further strengthen the common nutrition criteria that came into force in 2015 for almost all food categories. ESA Pledge members for instance reached an agreement for an extra 10% reduction on the salt threshold for potato-based snacks as well as for nuts and seeds, to be implemented respectively in 2020 and 2019.

In the interest of transparency, members also worked on designing an accountability mechanism that would enable members of the public (individual consumers, companies and/or civil society organisations) to question the compliance of a specific marketing communication from a member. A pilot test should be carried out in the first half of 2018 to assess the relevance and the suitability of the tool.

Looking forward...

In 2018-19, following the launch of the European Commission's European Strategy for Plastics in a Circular Economy Commission, the COMMS group will extend its activities towards environmental and sustainability issues.

On the communications side, the creation and constant improvement of our tools will be one of the key priorities for the COMMS group in 2018. The opportunity to integrate social media as part of ESA communication strategy could represent in this regard a major step forward. Stay tuned!



Year in review

SNACK NUTS

The Nut Processors Working Group (NPWG) brings together professionals from across the global supply chain for nuts, from origins through to processors. Chaired by Julie Adams (Almond Board of California), this dynamic expert group plays a key role in addressing the sector's concerns and interests, whether they are long-standing issues or newly emerging challenges. Through direct and constructive dialogue with decision-makers, and successful alliances with other trade associations at both an international and national level, the NPWG aims to ensure that the sector has its say in the development, drafting and implementation of new legislation, guidance and best practice affecting the sector.

World Customs Organization - Reclassification of blanched peanuts

In October 2016 a technical decision to classify blanched peanuts as roasted was adopted by the Harmonized Standards Committee (HSC) of the World Customs Organization (WCO). Throughout 2017 the NPWG has played a key and active role, seeking to reverse this decision, which would have dramatically impacted upon global trade.

Joining forces with FRUCOM, ESA coordinated an electronic group of international experts. This group worked intensively to produce a comprehensive document setting out key scientific and technical arguments to support the classification of blanched peanuts as raw, and the European Commission was able to use these arguments to back its position at the WCO.

In the months preceding the 60th session of the HSC, ESA and FRUCOM collaborated closely with a number of Brussels-based embassies in order to exchange information and coordinate actions. In total, 28 embassies and permanent representations in Brussels were contacted during the summer of 2017 in order to present the technical document developed by the electronic group, along with a letter signed by seven associations representing the international and European nut and peanut trade and industry. NPWG members were instrumental in gathering intelligence and communicating all relevant information to the national authorities in key producing countries.

All these efforts paid off in September 2017, when the HSC agreed by consensus to classify blanched ground-nuts as raw under heading 12.02, subheading 1202.42.

ESA participated in both consultations, providing arguments in favour of setting the aflatoxin ML at 15 µg/kg as a lower limit could present a barrier to trade with no appreciable consumer health benefit

Instead of considering the temperature of the heat treatment as the decisive criterion, a simplified approach was proposed to distinguish between blanched and roasted peanuts, based on physical properties and enzymatic activity of the products.

Residues of plant protection products

Insufficient transitional periods linked to EU proposals to reduce maximum residue levels (MRLs) of pesticides have become a recurrent issue in recent years. Therefore, the secretariat's efforts in 2017 have been aimed towards monitoring and anticipating changes to European legislation for sector-relevant plant protection products. ESA has also worked to raise awareness amongst decision-makers of the practical constraints and complexities associated with the application of new or revised MRLs, especially where there are insufficient transitional arrangements.

To support this work, ESA joined the Agri-Food Chain Roundtable on Plant Protection (AFCR-PP). This network of 24 industry associations covers the whole agri-food supply chain and strives for more open dialogue and increased transparency on the process leading to the setting of MRLs. So far, the AFCR-PP has been successful in introducing improvements regarding early access to information. For example, EFSA has agreed to notify members of the AFCR-PP whenever it receives a mandate to review the existing MRLs of an active substance following the non-renewal of its authorisation.

Codex Alimentarius – Maximum levels for aflatoxins in ready-to-eat peanuts

Since 2013, at the request of India, the Codex Committee on Contaminants in

Food (CCCF) has been working on the establishment of maximum levels (MLs) for total aflatoxins (AFT) in ready-to-eat (RTE) peanuts. To support this work, the Joint FAO/WHO Expert Committee on Food Additives carried out an impact assessment, concluding that a ML of 15 µg/kg levels would have little further impact on dietary exposure to aflatoxins for the general population for RTE peanuts, when compared with setting MLs at 10, 8, or even 4 µg/kg. Moreover, should the ML be set at 4 µg/kg, the proportion of the world market of RTE peanuts rejected would be approximately double when compared with the proportion rejected at an ML of 15 µg/kg i.e. about 20% compared with 10%.

In March 2017, based on this assessment, the CCCF proposed to set an ML of 15 µg/kg in RTE peanuts. However, due to the lack of consensus, two rounds of consultations were launched requesting comments from members and observers in support of an ML of either 15 µg/kg or 10 µg/kg.

ESA participated in both consultations, providing arguments in favour of setting the ML at 15 µg/kg as a lower limit could present a barrier to trade with no appreciable consumer health benefit.

Ahead of the 12th session of the CCCF, scheduled to take place in March 2018, the electronic working group led by India presented and its recommendation for an ML of 10 µg/kg for aflatoxins (total) according to the conclusions of the consultation rounds.

In parallel to this activity, the European Commission mandated EFSA to produce a statement on the effect on public health of a possible increase of the ML

from the current EU level of 4 µg/kg to 10 µg/kg for in peanuts and processed products thereof, intended for direct human consumption or for use as an ingredient in foodstuffs. EFSA found that an increase of the ML would increase the cancer risk for consumers of peanuts.

Regardless of the final ML that is adopted, the Commission is theoretically supposed to align the current EU ML of 4 µg/kg with the new Codex value. However, this would go against the ALARA (as low as reasonably achievable) principle which is commonly applied within the European Union.

ESA will continue to closely monitor developments on this subject and keep an open communication with the Commission to ensure a risk-based approach to this matter.

Ochratoxin A

Following a number of RASFF notifications on high ochratoxin A (OTA) levels found in products including pistachios, dried figs, and oilseeds, the Commission is considering setting MLs for these commodities. In order to inform the discussion, ESA provided data from members to the Expert Committee on Agricultural Contaminants in Food at the end of 2017. Further discussions within the Expert Committee are expected in the first half of 2018, including a targeted stakeholder consultation to which ESA will contribute.

EVENTS

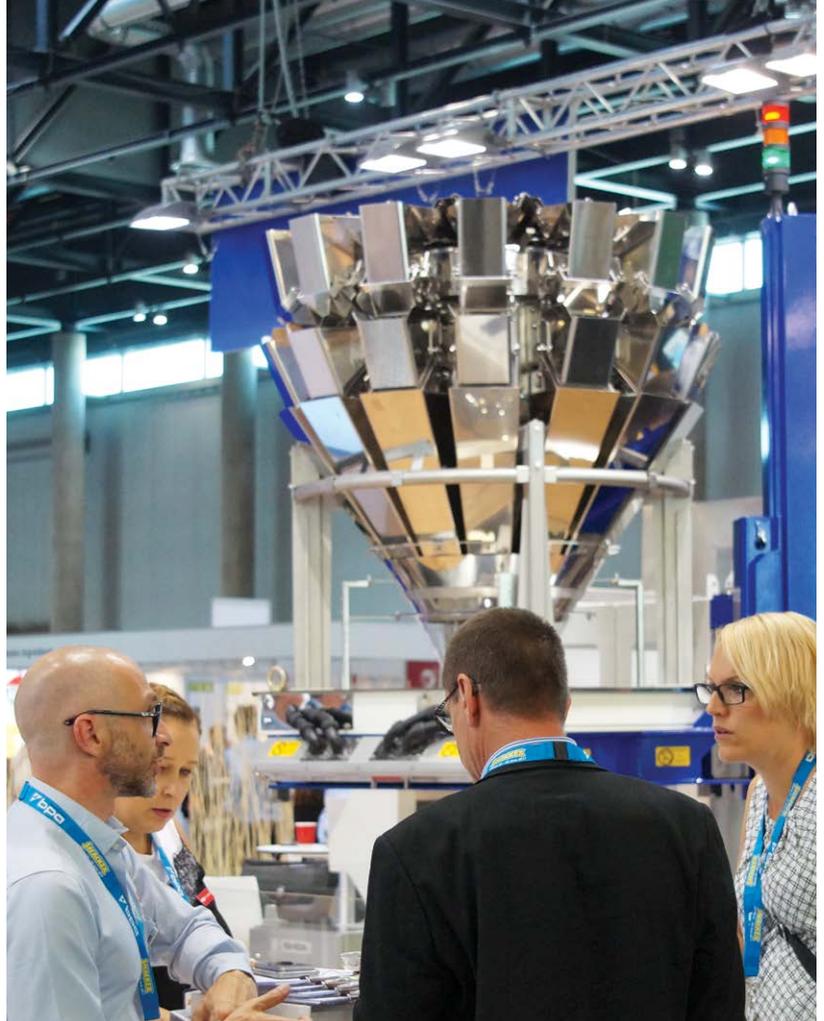
SNACKEX

Vienna, June 2017

+2,000 attendees

+155 exhibitors

+6,000 m2 trade fair floor



SNACKEX, the savoury snacks sector's flagship international trade fair and conference, is organised by the ESA secretariat and is held biennially.

SNACKEX represents a vital business-to-business networking and sales channel that facilitates the development and monetisation of relationships between buyers and sellers in the savoury snacks market.

Focused on developing an international, sector-wide platform that facilitates business connections, SNACKEX gained further traction in 2017 achieving the highest ever number of exhibitors and the largest show floor area in its history. Taking place at Messe Wien, Vienna, the 17th edition of SNACKEX invited manufacturers, suppliers and buyers to 'discover tomorrow's snacking' through a combination of a record breaking performance and a conference agenda packed with expert industry insights. Participants reported that business was brisk at Europe's only professional trade event dedicated solely to the savoury snacks sector. Some 155 exhibitors at SNACKEX were showing novel solutions to help manufacturers meet growing consumer demand for the latest snacking must-haves, while conference delegates left armed with the knowledge to face some of our sector's biggest challenges.

Having a sector-focused event like SNACKEX, where people can meet to discuss the innovations and challenges of our sector and do business with suppliers large and small from around the globe, is a big advantage according to conference delegates and the many international buyers looking to do business with exhibitors.

The two-day conference programme which supports the trade fair highlighted the latest trends in markets and consumer preferences, enabling delegates to discover the key drivers that will shape tomorrow's snacking behaviour. Speakers also set out strategies to help overcome some of the looming challenges facing snack producers across Europe. As the broad brush developments were being discussed in the conference room, those with more immediate, practical processing concerns were well served down in the show floor Knowledge Centre, with presentations on a range of technical solutions designed to enhance production efficiency.

The next edition of SNACKEX will be held in Barcelona, Spain, 27-28 June 2019, where once again conference delegates will learn about the latest trends and challenges and industry buyers will be discovering practical solutions to help them gain a business advantage.

The 17th edition of SNACKEX invited manufacturers, suppliers and buyers to 'discover tomorrow's snacking'



ESA Conference in the European Parliament EU nutrition and health policy: Who is in the driving seat?

Brussels, November 2017

On 22 November 2017, ESA organised a successful and lively panel debate in the European Parliament to exchange views on the future of the EU nutrition and health policy. The event was hosted by Dr Renate Sommer, a prominent member of the European Parliament Committee for Environment, Health and Food Safety (ENVI).

Ten years after the European Commission's white paper on a *strategy for Europe on nutrition, overweight and obesity-related issues*, the aim was to discuss lessons learned and explore ways of building consensus on future effective policy in a context of rising non-communicable diseases.

The role of the different stakeholders was at the centre of the discussion and if there was a consensus that all have a role to play in addressing the issue. It was noted by Paul Skehan (PepsiCo) on behalf of ESA that the industry is increasingly side-lined and that current tools such as the EU Platform for Action on Diet, Physical Activity and Health are no longer a place for constructive dialogue.

In the current context of heightened unilateral action on certain policies, panellists also discussed current developments at member states level where a number of initiatives are likely to fragment the single market (e.g. front-of-pack labelling schemes or country of origin labelling).

Mr Arūnas Vinčičūnas on behalf of the European Commission claimed that the protection of public health does not necessarily clash with the need to preserve the single market while some other speakers stressed the need for greater harmonization at EU level.

Key note speakers:

Renate Sommer

Member of the European Parliament

Arūnas Vinčičūnas

Head of Cabinet to Health and Food Safety Commissioner Vytenis Andriukaitis, European Commission

Paul Skehan

Senior Director, EU Public Policy, Government Affairs & Communications, PepsiCo

Ilaria Passarani

Head of Food and Health, European Consumers Organisation

Doru Frantescu

Director and Founder of VoteWatch Europe

Snack Nut Production Course

Valencia, October 2017

We are pleased to report that our residential snack production courses remain as popular as ever with the latest in the series taking place in Valencia, Spain, 16-18 October 2017, covering snack nuts from origin to packet.

Forty four delegates, ESA members and others, travelled from 18 countries to join us in Valencia for the 3 day intensive course to sharpen their skills and further their knowledge of snack nut production. Whilst not attempting to make attendees experts, they leave with a thorough, well-rounded grounding in industry best practice from acknowledged experts.

The course was a great opportunity for all production-oriented delegates of the nut sector to meet, network, and exchange good practices and experiences. The course received excellent reviews. The programme covered expert presentations on nut production from origin and sourcing through harvesting, sorting processing, flavouring and packing. During the course a visit to the Valencia Port Health Authority facility was made to enable delegates to experience first-hand how snack nuts imported from outside of the EU are inspected and tested prior to acceptance or rejection. Later, delegates took part in a practical flavour workshop enabling teams to conceive and create their own unique flavoured nut products and have them judged by flavour experts.

Combining knowledge and insight with an element of fun is at the heart of the rationale for these popular courses and delegates had plenty of time to network and share their own experiences and challenges with their peers and speakers. The snack production course programme continues with part one - chips and snacks from raw materials to formed products - which takes place in Prague, 16-18 April 2018, followed by part two - chips and snacks from flavouring to end-of-line, to be held in the autumn of 2018.

ESA would like to thank all our participants and our speakers for making these courses such a great success.



WHO WE ARE

The European Snacks Association is Europe's only trade organisation dedicated to advancing the savoury snacks industry on behalf of member snack manufacturers and suppliers.

+200 companies
have ESA membership

+40 countries
represented by members

+80% share
of branded European market

ESA has a broad international membership of manufacturers and companies supplying equipment, ingredients, and services to the industry. ESA's membership groups some 200 companies of all sizes in 40 countries, and ESA members represent approximately 80% of the branded European savoury snacks market.

Headquartered in Brussels, we are recognised as the voice of the industry before the European decision makers, and other key stakeholders.

How we work

ESA keeps members abreast of regulatory and legal developments relevant for the sector through regular working group meetings. Minutes of these groups are posted on the ESA members' website. Detailed examples of the remit and scope of these groups may be found in preceding pages.

The ESA board sets the direction of the organisation and approves the organisation's strategic plan for the forthcoming year. It supervises the work of the working groups and is led by the president. The general assembly is the decision-making body of ESA and meets annually. It approves the budget, elects the board and amends the association's by-laws. It consists of all business members of the organisation, each represented by a permanent delegate.

What we do

ESA represents member companies' interests at European and international level and is proactive in its anticipation and fielding of potential issues of relevance to the industry.

ESA is instrumental in co-ordinating a united industry view when interacting with the

European Commission and the European Parliament. In practice this means minimising the regulatory burden for members, protecting their right to produce, advertise and sell their products as well as further promoting the understanding of savoury snacks and snack nuts.

None of this would be possible without the support of our members and their willingness to work together on non-competitive issues. Our role in this is to provide the necessary platform for this interaction to take place and to help facilitate it in an effective and productive manner.

Who we work with

ESA has developed effective and successful working relationships with government, professional bodies and trans-national agencies. ESA is affiliated to FoodDrinkEurope and represents the sector on several of its key working groups. It also enjoys close working relationships with many other food and drink sector organisations in Europe and beyond.

Some of the organisations ESA works closely with:

- European Commission
- European Parliament
- Food standards agencies
- Codex Alimentarius Commission
- European food industry federations
- Non-governmental organisations
- European potato processing associations
- European food trade associations
- International snack food associations
- International peanut councils

...and many other food sector organisations around the world.



OUR STRUCTURE

Board of Directors

Valentina Maglio (President)	Unichips
Julie Adams	Almond Board of California
Carmel Collins	Kerry
Gloria Gabellini	PepsiCo International
Roger Harlacher	Zweifel Pomy-Chips
Maarten Leerdam	Intersnack Group
Marco Montanaro	Kellogg Company
Rolf Nilges	Intersnack Group
Paul Skehan	PepsiCo International
Robert Torck	Lorenz Snack-World
Susanna Vitaloni	Unichips
Göran Wadsten	Rosenqvists Food Technologies
Sebastian Emig	European Snacks Association

ESA Secretariat

Sebastian Emig	Director General*
Philip Mathieu	Marketing & Events
Andrew Curtis	Regulatory & Scientific Affairs
Marta de la Cera	Regulatory & Scientific Affairs
Olivier Devaux	Public Affairs & Communications
Veronica Yakicioglu	Events & Membership

*in his capacity as permanent representative of PrimeConsulting BXLBCN SL

The Snacks Magazine

Michelle Knott	Editor
Jasmin Hill	Advertising & Production

WORKING GROUP STRUCTURES

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EC Regulatory Working Group

Issues including:

- Process contaminants
- Labelling
- Food contaminants
- Flavours, additives & enzymes
- General food law
- Food safety
- Nutrient profiles
- Nutrition & health claims
- Salt/sodium
- Food contact materials
- Novel foods
- Endocrine disruptors
- Allergens

Active participants

Katie Carson (Chair)	Kellogg Company (1st semester)
Johan Wauben	Kellogg Company
Ruth Adewale	PepsiCo International
Hermann Meng	Mondelez International
Anika Nonn	Intersnack Group
Horst Kalbfleisch	Lorenz Snack-World
Corinna Günther	Lorenz Snack-World
Marco Blumenthal	Zweifel Pomy-Chips
Valeria Tessera	Unichips
Oriol Bessa Caserras	Liven
Greg Pearson	McCormick
David Hoareau	Sensient Flavours
Sandeep Topiwala	Sensient Flavours
Jane Route	Symrise
Aoife Timmons	Kerry
Damien Godfrey	Kerry
François Prébin	Mane
Carsten Bernoth	BDSI
Julia Gisewski	BDSI
Virginie Freslon	L'Alliance 7
Manon Vuong	L'Alliance 7
Marta de la Cera	European Snacks Association
Andrew Curtis	European Snacks Association

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Nut Processors Working Group

Issues including:

- Fosetyl residues
- Mycotoxins
- Heavy metals
- Other contaminants
- Import controls and inspection fees
- Allergens risk assessment
- General food law
- Labelling
- Nutrition & health claims
- Rapid alerts
- Responsible sourcing and sustainability
- Endocrine disruptors

Active participants

Julie Adams (Chair)	Almond Board of California
Louise McKerchar	American Peanut Council
Herman Driesens	European Nut Association
Abel Santos	Intersnack Group
Michael Brunnert	Intersnack Group
Jurgen van Oorschot	Intersnack Group
Horst Kalbfleisch	Lorenz Snack-World
Henry Kulnick	Lorenz Snack-World
Lieven Plets	Wonderful Pistachios & Almonds
Jason Nissen	Wonderful Pistachios & Almonds
Erik van Dorp	Olam Europe
Aseem Khanna	Olam Europe
Michael Lebouille	Mars
Marie-Jose van Litsenburg	Mars
John Bennett	Mars
Doug Mann	Mars
Edoardo Francanzani	Cámara Argentina del Maní
Menno van der Pijll	Triz Ventures
Julia Gisewski	BDSI
Carsten Bernoth	BDSI
Sharon Hall	SNACMA
Marta de la Cera	European Snacks Association

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Communications Working Group

Issues including:

- EU nutrition & health policy
- EU Pledge and responsible advertising
- EU Platform for Action on Diet, Physical Activity and Health
- Industry commitments
- Food taxation
- Stakeholder engagement & outreach programme
- Media relations

Active participants

Gloria Gabellini (Chair)	PepsiCo International
Mathijs Peters	PepsiCo International
Valentina Maglio (ESA President)	Unichips
Silvia Ferrata	Unichips
Marco Montanaro	Kellogg Company
Richard Burrell	Dow Seeds
Anders Högberg	Orkla Brands
Torsten Blume	Lorenz Snack-World
Bernd Ter Glane	Intersnack Group
Birgit Terporten	Intersnack Group
Robin Schwidder	VBZ
Guido Wolf	Ültje
Carsten Bernoth	BDSI
Veronica Ballesteros	Liven
Julia Gisewski	BDSI
Sebastian Emig	European Snacks Association
Olivier Devaux	European Snacks Association

MEMBER SERVICES

Advocacy

Representation of members' interests at European and international levels.

Specialist committees

Addressing key issues of direct relevance to the industry.

Media relations

Providing a positive industry voice to media, governments and opinion formers.

Publications

The Snacks Magazine is ESA's official trade journal, published quarterly.

Events

SNACKEX – Europe's only trade fair, conference and sourcing event for the savoury snacks industry. Plus various top level conferences and outreach events.

Education courses

Programme of snack and nut production education courses designed to impart knowledge on industry best practice and latest applications of new technology.

Members' newsletter

Providing monthly online industry news and regulatory updates.

Incident management

Acting as the central contact and information source in the event of an industry incident.

Industry database

Searchable members database providing ready access to key information about ESA members' activities and areas of operation.

Technical advice

Providing technical advice and guidance on demand to snack manufacturer members.

General enquiries and information

Responding to requests for information on many aspects of the industry.

PUBLICATIONS

Online

www.esasnacks.eu

The ESA website is the public face of the savoury snacks industry. It provides information about the industry, the sector's products and about ESA itself to government, opinion formers and the media.



Members' Area

The members' area is password protected for ESA members only. The following is a guide to what can be found there:

- **Risk Issues**
Information on those key issues which have been identified and graded in a regularly updated risk matrix as having a potential impact on members' businesses, together with a quarterly update on the status of action being taken.
- **Industry Positions**
Latest aligned industry positions on key issues.
- **Working Groups**
Source which member representatives are active in these groups and where to find the latest minutes of their meetings.
- **Fact Sheets**
A useful source of information intended

for use when communicating to company employees to help them understand the real facts about the products they help to make. They can also be used externally when responding to enquiries from the general public or the press.

- **Newsletter Archive**
Where to find back issues of ESA's monthly members' Snack Bulletin email newsletter.
- **Members Database**
A directory of all ESA members, easily searchable by key criteria, including product type, company activity, country,

Members Snack Bulletin Email Newsletter
Members receive a digest of industry related news and the latest developments in technical, regulatory and legislative matters, direct to their desktop every month.

Print

The Snacks Magazine

The Snacks Magazine is ESA's official trade journal. It is published quarterly and circulated to readers around the world, all of whom are directly concerned with the savoury snack and related industries. It is one of the Association's prime vehicles of communication with members and is a must-read publication for everybody in the international savoury snack sector.

The content of the publication remains totally focused on the savoury snacks business, complete with news, topical features and a range of regular sections covering everything from the latest regulatory developments to trends in the vital commodities markets.

Free to members, and available to non-members on subscription, *The Snacks Magazine* is also available online.

Important features published over the last year included flavours and seasonings, country of origin labelling, snack pellets, sorting & inspection, robotics and supply chain management.

Member company profiles covered Rosenqvists Food Technologies and Unichips and a market profile on Austria was published.

Regular coverage is given to topical issues such as European legislation, commodities and current research.

In-depth analysis and commentary on ESA's annual European state of the industry report is published in the autumn issue.

The magazine is regarded as a serious vehicle for advertising latest techniques, equipment and supplies to the industry not only in Europe, but internationally.



JOIN US



ESA membership is open to any global manufacturer of potato chips (crisps), savoury snacks and/or snack nut products and to companies which supply the industry with ingredients, flavours and processing / packaging equipment or other related services. Any trade association or trade organisation whose members are wholly or mainly engaged in the processing of savoury snack products may also be eligible for membership.

If you are operating in the savoury snacks industry in any way, you can benefit from joining ESA. In addition to many other benefits, all member companies receive:

- Discounted rates for exhibitors and conference delegates at SNACKEX – the only trade fair and conference in Europe devoted to the savoury snacks industry
- Discounted advertising rates in *The Snacks Magazine* – the association's official magazine published quarterly and reaching an international audience
- Discounted rates for our snack and nut production course programme – have your employees sharpen their production skills and knowledge of the industry
- Online access via members' website to the latest information on key issues for the industry including members' directory, new legislation and minutes of quarterly ESA working group meetings
- Access to regular business conventions and seminars, all at discounted rates
- Monthly e-mail newsletter.

There are classes of membership for:

Business

Snack manufacturers

Associate

Suppliers of ingredients, equipment, materials and services to the industry

Trade

Other associations and professional bodies

Companies wishing to join ESA are invited to make a formal application for the appropriate category of membership by contacting the ESA secretariat who will be pleased to answer your questions and help you with further details of membership benefits and fees.



The voice of the industry in Europe

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