

SUCCESS in a changing policy environment



While consumer expectations and innovation dynamics are evolving, the political and regulatory environment in which the savoury snacks sector operates is undergoing a structural shift of its own, says **Sebastian Emig**

THE European policy landscape in which we all have to operate is becoming more strategic, more reactive and, at times, less predictable.

This shift is driven in large part by broader geopolitical developments. Rising trade tensions between major global actors, combined with industrial overcapacity and energy-related shocks, are reshaping the European Union's approach to economic policy. The Single Market, long defined by openness and liberalisation, is increasingly framed through the lens of resilience, competitiveness and strategic autonomy.

For food manufacturers, this evolution is not theoretical. It affects access to inputs, cost structures, investment decisions and long-term planning. Trade policy, once largely technical in nature, is becoming more politicised and more closely tied to broader geopolitical considerations. As a result, businesses must operate in an environment where stability can no longer be taken for granted.

COMPETITIVENESS AND SECURITY

At the same time, the internal dynamics of EU policymaking are shifting. There is a growing recognition among policymakers that regulation, while essential, must be balanced against the need to maintain Europe's industrial competitiveness. This is reflected in the increasing prominence of "simplification" agendas and efforts to reduce administrative burdens across a range of policy areas.

In practice, this is leading to a rebalancing of priorities. Where previous policy cycles focused heavily on expanding regulatory frameworks, the current phase

places greater emphasis on implementation, cost and impact. Corporate sustainability legislation, for example, is already being revisited in light of competitiveness concerns, signalling a more pragmatic and, at times, contested approach to the Green Deal.

For industry, this creates both opportunities and uncertainties. On the one hand, there is greater openness to dialogue and to aligning policy objectives with economic realities. On the other hand, the direction of travel is less linear, with the potential for adjustments, delays or reversals as political priorities evolve.

FAST DECISIONS, SHORT TIMELINES

Another notable development is the changing nature of the legislative process itself. In response to a more volatile geopolitical environment, EU institutions are increasingly exploring faster procedures, with shorter consultation periods and reduced reliance on traditional impact assessments.

While this may enhance the Union's ability to respond quickly to external shocks, it also raises important questions about predictability and transparency. For stakeholders, including the food sector, this means adapting to shorter policy cycles and engaging earlier in the process to ensure that decisions remain grounded in evidence.

The risk is not simply one of speed, but of reduced visibility. In a context where policymaking becomes more reactive, the ability to anticipate and shape outcomes becomes more challenging, reinforcing the importance of proactive engagement. ►

CONTESTED POLICIES

Overlaying these institutional changes is a broader shift in the policy narrative. Issues such as nutrition, sustainability and food systems are becoming more politically charged, with increasing scrutiny of processed foods and renewed debates around reformulation, labelling and dietary guidance.

At the same time, tensions between environmental ambition and economic competitiveness are becoming more pronounced. The result is a policy environment in which trade-offs are more visible and more openly debated.

For the savoury snacks sector, this means operating in a space where expectations are high, but consensus is not always guaranteed. It also underscores the importance of maintaining a clear, evidence-based voice in discussions that can quickly become polarised.

ENGAGEMENT AS A PRIORITY

Taken together, these developments point to a policy environment that is not only more complex, but also more strategic in nature. Decisions are increasingly shaped by considerations that go beyond individual sectors, reflecting broader concerns about security, resilience and global positioning.

In this context, engagement with policymakers is no longer a reactive exercise. It is a strategic priority. The ability to contribute constructively to debates, to provide evidence and to articulate practical solutions will be essential to ensure that policy outcomes remain workable and proportionate.

As ESA's Director General, I am confident that our sector is well equipped to navigate this environment. The savoury snacks industry has long operated at the intersection of innovation, regulation and consumer expectations. By remaining pragmatic, united and forward-looking, we can continue to play a constructive role in shaping a policy framework that supports both competitiveness and responsible growth.

The environment may be becoming more complex, but with clarity of purpose and active engagement, it remains one in which our sector can continue to thrive.

SNACK INNOVATION

As we move further into 2026, it is becoming increasingly clear that the savoury snacks sector is entering a new phase of development. Consumer demand remains strong, but expectations are shifting in

ways that are both subtle and profound. The question is no longer simply how to grow, but how to adapt to a market where snacks are expected to deliver more in every bite. For manufacturers, this shift is not abstract. It is visible in product development pipelines, reformulation strategies and the growing complexity of delivering products that meet evolving consumer needs. At the same time, it is reshaping relationships across the value chain, particularly with ingredient partners who play a critical role in enabling innovation.

PERMISSIBLE FUNCTIONALITY

Few developments illustrate this transition more clearly than the mainstreaming of protein, fibre and whole grains in savoury snacks. What was once the domain of specialised or niche products is now moving into everyday consumption.

Consumers are not abandoning indulgence, but they are increasingly looking for snacks that offer an additional layer of functionality, whether in terms of satiety, digestive health or nutritional balance.

This shift is also being influenced by broader developments in the health landscape, including the rise of GLP-1 weight-management treatments. While initially perceived as a disruptive force, their longer-term impact appears to reinforce a more familiar conclusion: sustainable health outcomes depend on consistent dietary habits, not short-term interventions. In this context, snacks that combine enjoyment with nutritional value have a clear role to play.

For manufacturers, this represents both an opportunity and a challenge. The opportunity lies in meeting consumers where they are, offering products that align with real lifestyles. The challenge lies in doing so without compromising the sensory qualities that define successful snacks. Taste, texture and overall eating experience remain decisive.

INNOVATION CONSTRAINTS

At the same time, innovation is becoming more demanding. The addition of protein or fibre is no longer sufficient in itself. Products must deliver on multiple dimensions simultaneously: flavour, texture, affordability and simplicity.

This creates a series of well-known trade-offs. Higher protein content can introduce off-notes or affect texture. Fibre enrichment can lead to dryness or processing challenges. Sodium reduction remains important but must be achieved without diminishing flavour impact. In

parallel, consumers are paying closer attention to ingredient lists, reinforcing the need for clean-label solutions based on familiar and trusted ingredients.

Cost considerations further complicate the picture. In an environment where affordability remains a key purchasing driver, solutions must not only work technically but also at scale. At the same time, manufacturers are seeking to streamline portfolios, focusing on products that deliver clear value and consistent performance.

In this context, innovation is less about adding features and more about resolving constraints. The ability to balance these competing demands is becoming a defining capability for the sector.

CONFIDENCE IN ADAPTABILITY

Taken together, these trends point to a sector that is evolving, but also demonstrating its resilience. The savoury snacks industry has long combined innovation with accessibility, and this remains one of its core strengths.

The current phase of development does not signal a departure from this model, but rather its evolution. The objective is not to replace enjoyment with functionality, but to combine the two in ways that are credible, scalable and aligned with consumer expectations.

As ESA's Director General, I remain confident in the sector's ability to navigate this transition. By focusing on practical solutions, maintaining a clear understanding of consumer needs and strengthening collaboration across the value chain, the industry is well positioned to continue delivering products that resonate.

The challenge ahead is not to choose between health and enjoyment, but to ensure that both remain firmly within reach. ■



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