



Confédération des industries agro-alimentaires de l'UE
Confederation of the food and drink industries of the EU



Annual Report 2009



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ROLE AND MISSION OF CIAA

The EU food and drink industry is an important pillar of the European economy, as one of the most successful and dynamic business sectors. As the largest manufacturing sector in Europe, the industry boasts an annual **turnover of €965 billion**, half of which is generated by small and medium-sized companies (SMEs). The sector is highly fragmented comprising some **310,000 companies, 99.1%** of which are **SMEs**. The EU agri-food industry also purchases and processes some **70% of EU agricultural production** and employs **4.4 million people**.

CIAA is the body representing Europe's diverse food and drink sector, protecting and promoting the interests of the largest multinational to the smallest producer, as well as sectors, all of which form the building blocks of the industry.

CIAA's mission is to facilitate the development of an environment in which all European food and drink companies, whatever their size, can meet the needs of consumers and society, while competing effectively for sustainable growth.

CIAA contributes to the development of an appropriate framework in which issues such as competitiveness, affordability of high quality food, consumer trust, food safety, informed consumer choice, responsible business practices and the environment are dealt with in a holistic manner, underpinned by sound science, robust data management and effective communication.

In delivering this mission, the CIAA will, in close cooperation with its members, operate as an active, committed and responsible stakeholder, and, as the representative of the whole food and drink industry in the EU, increase the visibility of the European industry, enhance and promote its cultural and social values, its richness and variety, tradition and culture.

CIAA's permanent secretariat, based in Brussels, maintains close contacts with European and international institutions and has become a major partner in consultations on food-related developments.

Membership of CIAA¹ is made up of:

- 26 national federations, including 3 observers;
- 26 EU sector associations; and
- 20 major food and drink companies.

CIAA co-ordinates the work of more than 700 experts, grouped in Committees and Expert Groups around the following three themes:

-  **Competitiveness**
-  **Food and Consumer Policy**
-  **Environmental Sustainability**

Through these Committees and Expert Groups, manufacturers from all EU countries provide broad and in-depth expertise. They contribute to establishing CIAA positions on key issues, which, once approved, are communicated to European and international decision-makers.

Some facts and figures about the EU food and drink industry

- Largest manufacturing sector in Europe, with an annual **turnover of € 965 billion**;
- Purchases and processes **70% of EU agricultural production**;
- **Exports some € 58 billion** in food and drink products to third countries;
- Contributes to a **positive trade balance of around € 1.1 billion**;
- Offers over **500 million consumers** a wide range of safe, wholesome, nutritious and affordable food and drink products; and
- **Employs 4.4 million people**.

¹ As of January 2010

MESSAGE FROM THE PRESIDENT AND THE DIRECTOR GENERAL



Jesús Serafín Pérez
President

For CIAA, 2009 was in many respects shaped by successful efforts to raise the visibility and awareness of the competitiveness challenges and requirements of the EU food and drink industry. In an ever-changing political environment, CIAA has also undergone significant change within the **organisation** itself.

To better serve its members, CIAA has re-modelled itself into a modern, efficient organisation, working under new governance rules, a committed Board and a redefined mission. I was delighted to join the CIAA team in July as **President** and take on the responsibility of leading a “CEOs only” Board. This represents quite a dramatic change in the governance of the Confederation and an interesting challenge for me in the future.

I look forward to working with many of you in the coming years on the vast panorama of dossiers that are of paramount importance to the industry.

2009 was a particularly active and challenging year for CIAA and Europe’s food and drink industry. We have witnessed developments within a number of important dossiers, welcomed a new Parliament and have been busy organising several noteworthy events.

CIAA focused on a number of key issues throughout the year, in particular, the launch and continued work of the European Food Sustainable Consumption and Production Round Table, the work of the High Level Group on the Competitiveness of the EU Agri-food industry, the revision of the Novel Foods Regulation, and developments within the framework of the Food Information Package, to name but a few.

CIAA welcomed the creation of the **European Food Sustainable Consumption and Production (SCP) Round Table (RT)** in May, which aims to establish the food chain as a major contributor towards sustainable consumption and production in Europe. CIAA is a founding member of this public-private initiative, which comprises 24 member organisations representing the European food supply chain, and is co-chaired by the European Commission. The RT’s activities will not only help to strengthen the long-term competitiveness of Europe’s food chain, but also support EU policy objectives.

The establishment of the **High Level Group (HLG) on the Competitiveness of the EU Agri-food Industry** in June 2008 provided an opportunity to put essential requirements of the food and drink industry into the political limelight. The continued work of this group led

to the adoption in July 2009 of a Report, a list of 30 Recommendations and a Roadmap (set of accompanying actions), all of which aim at boosting the performance of the food and drink sector. CIAA members continued to actively monitor the implementation of this Roadmap and actions throughout the year demonstrating their commitment to playing an active and direct role within this process.

In addition, CIAA continued to closely follow the developments within the revision of the **Novel Foods Regulation**. As the proposal continued through the legislative process, CIAA actively communicated its position and was pleased to see that a number of important aspects were taken on board by the Institutions by June.

In July, CIAA took the opportunity to congratulate the **new MEPs** on their election to the European Parliament for the 2009-2014 legislative term, via a **'Who is Who'** brochure and several one-on-one meetings. Highlighting a number of the key challenges facing our sector; we called on MEPs to help keep the competitiveness of the EU agri-food industry high on the EU political agenda.

The release of the European Food Safety Authority's (EFSA) first set of Opinions on the scientific merits of generic **health claims** in October represented a positive development in reaching a harmonised, Community-wide list of such claims. This list is imperative to manufacturers in order to have certainty about which products can make claims across the European market. CIAA looks forward to the next steps in the process in reaching agreement on a common list of accepted claims.

CIAA equally welcomed EU harmonisation in relation to the **Food Information Package** in November. We strongly believe that this is the only means to guarantee the Single Market and the free movement of goods whilst protecting the legitimate interests of producers and enabling consumers to make informed choices. We were therefore pleased at the recognition of our approach to nutrition labelling and in particular the Commission's support of our voluntary scheme based on Guideline Daily Amounts (GDAs). CIAA published its updated position on mandatory nutrition labelling and continued to promote the importance of portions for improving consumer understanding.

I would like to thank those who chaired our Committees and Expert Groups during the year - Geoff Thompson of Danone, Ruth Rawling of Cargill, Pascal Greverath of Nestlé and Paul Fitzsimmons of Kellogg's. They give their time and expertise willingly and their support is greatly appreciated.

Finally, great appreciation and acknowledgement of invaluable professional support should, as always, be expressed to the whole team in the CIAA Secretariat.



Mella Frewen
Director General

BOARD OF DIRECTORS



President
Mr. J. S. PÉREZ
Aguas de Fuensanta S.A.



Vice-President
Dr. W. HEER
Südzucker



Vice-President
Ms. D. REINICHE
Coca-Cola



Vice-President
Mr. A. ZANETTI
Zanetti SpA



Treasurer
Mr. D. DEBROSSE
Heineken



Mr. Z. ABDALLA
PepsiCo



Mr. D. BAILLIE
Unilever



Mr. M. CAPURSO
Ferrero International S.A.



Mr. M. A. CLARKE
Kraft Foods



Mr. M. DELBAERE
Crop's N.V.



Mr. F. EGBERTS
Henri Van De Bilt



Mr. L. FREIXE
Nestlé Europe



Mr. M. GRANBORG
Danisco



Mr. T. KUNZ
Danone



Mr. T. MOBSBY
Kellogg's



Mr. J. G. MOSELEY
General Mills International



Mr. F. PIZZAGALLI
Fumagalli Industrie Alimentari SpA

LIAISON COMMITTEE

Barilla Group

Mr. P. BARILLA

Cadbury

Mr. C. van STEENBERGEN

Campbell Europe

Mr. J. P. SECHI

Cargill

Mr. F. van LIERDE

Coca-Cola

Ms. D. REINICHE

Danone

Mr. T. KUNZ

Ferrero International S.A.

Mr. M. CAPURSO

General Mills International

Mr. L. MERIZALDE

Heineken

Mr. D. DEBROSSE

Heinz

Mr. R. van NEERBOS

Kellogg's

Mr. T. MOBSBY

Kraft Foods

Mr. P. BOURDIN

Mars

Mr. A. WESTON-WEBB

Nestlé Europe

Mr. L. FREIXE

PepsiCo

Mr. Z. ABDALLA

Procter & Gamble Food Products

Mr. B. de BUITLEIR

Südzucker

Dr. W. HEER

Tate & Lyle

Mr. I. FERGUSON

Ülker

Mr. M. TÜTÜNCÜ

Unilever

Mr. D. BAILLIE

EXECUTIVE COMMITTEE

CIAA President

Mr. J. S. PÉREZ

Aguas de Fuensanta S.A.

Food Information and Nutrition

Mr. D. BAILLIE

Unilever

Transition and Communication

Mr. M. CAPURSO

Ferrero International S.A.

Treasurer

Mr. D. DEBROSSE

Heineken

HLG - Competitiveness

Mr. L. FREIXE

Nestlé Europe

Agriculture and Trade

Dr. W. HEER

Südzucker

Science and Safety

Mr. J. G. MOSELEY

General Mills International

Environment

Ms. D. REINICHE

Coca-Cola


SMEs

Mr. A. ZANETTI

Zanetti SpA

CIAA MEMBERS

National Federations

 AUSTRIA

FIAA - Fachverband der Nahrungs- und Genussmittelindustrie
www.dielebensmittel.at

 BELGIUM

FEVIA – Fédération de l'Industrie Alimentaire / Federatie Voedingsindustrie
www.fevia.be

 CZECH REPUBLIC

PKCR – Potravinářská Komora České Republiky
www.foodnet.cz

 DENMARK

DI – Foedevareindustrien
www.foedevareer.di.dk

 ESTONIA

ETL – Eesti Toiduainetööstuse Liit
www.toiduliit.ee

 FINLAND

ETL – Elintarviketeollisuusliitto
www.etl.fi

 FRANCE

ANIA – Association Nationale des Industries Alimentaires
www.ania.net

 GERMANY

BLL – Bund für Lebensmittelrecht und Lebensmittelkunde
www.bll.de

BVE – Bundesvereinigung der Deutschen Ernährungsindustrie
www.bve-online.de

 GREECE

Συνδεσμος Ελληνικων Βιομηχανιων Τροφιμων (Federation of Hellenic Food Industries)
www.sevt.gr

 HUNGARY

ÉFOSZ – Élelmiszerfeldolgozók Országos Szövetsége
www.efosz.hu

 IRELAND

FDII – Food & Drink Industry Ireland
www.fdi.ie

 ITALY

FEDERALIMENTARE – Federazione Italiana dell'Industria Alimentare
www.federalimentare.it

 LATVIA

LPUF – Latvijas Pārtikas uzņēmumu federācija
www.lpuf.lv

 LUXEMBOURG

FEDIL – Business Federation Luxembourg
www.fedil.lu

 POLAND

PPFZ – Polska Federacja Producentów Żywności Związek Pracodawców
www.pfpz.pl

 PORTUGAL

FIPA – Federação das Indústrias Portuguesas Agro-alimentares
www.fipa.pt


 ROMANIA

Romalimenta – Federatia Patronala din Industria Alimentara
www.romalimenta.ro

 SLOVAKIA

PKS – Potravinárska Komora Slovenska
www.potravinari.sk

UFPS – Union of Food Producers in Slovakia

 SLOVENIA

GZS – Gospodarska zbornica Slovenije
www.gzs.si

 SPAIN

FIAB – Federación Española de Industrias de la Alimentación y Bebidas
www.fiab.es

 SWEDEN

LI – Livsmedelsföretagen
www.li.se

 THE NETHERLANDS

FNLI – Federatie Nederlandse Levensmiddelen Industrie
www.fnli.nl

 UNITED KINGDOM

FDF – Food & Drink Federation
www.fdf.org.uk


OBSERVERS

 CROATIA

HUP - Hrvatska Udruga Poslodavaca
www.hup.com.hr

 NORWAY

NHO – Mat og Drikke
www.nhomatogdrikke.no

 TURKEY

GDF – Türkiye Gıda ve İçecek Sanayii Dernekleri Federasyonu
www.gdf.org.tr

Sectors

Bakery

AIBI – International Federation of Plant Bakeries

www.aibi-online.org

Beer

THE BREWERS OF EUROPE

www.brewersofeurope.org

Bottled Waters

EFBW – European Federation of Bottled Water

www.efbw.org

Breakfast Cereal

CEEREAL – European Breakfast Cereal Association

www.ceereal.eu

Broth & Soup

FAIBP – Federation of the Associations of the EU Broth and Soup Industries

www.aiibp-faipb.org

Chocolate, Biscuits & Confectionery

CAOBISCO – Association of the Chocolate, Biscuit & Confectionery Industries of the EU

www.caobisco.com

Dairy Products

EDA – European Dairy Association

www.euromilk.org

Dietetic Products

IDACE – Association of Dietetic Food Industries of the EU

www.idace.org

Fruit & Vegetable Juices

AIJN - European Fruit Juice Association

www.aijn.org

Fruit & Vegetable Preserves

PROFEL – European Association of Fruit and Vegetable Processors

www.profel-europe.eu

Ice Cream

EUROGLACES – European Ice Cream Association

www.euroglaces.eu

Intermediate Products for Bakery & Confectionery

FEDIMA – Federation of EU Manufacturers & Suppliers of Ingredients to the Bakery, Confectionery & Pastry Industries

www.fedima.org

Margarine

IMACE – International Margarine Association of the Countries of Europe

www.imace.org

Pasta

UNAFPA – Union of Organisations of Manufacturers of Pasta Products of the EU

www.unipi-pasta.org

Pet Food

FEDIAF – The European Pet Food Industry Federation

www.fediaf.org

Processed Meat

CLITRAVI – Liaison Centre for the Meat Processing Industries

www.clitravi.eu/

Processed Potatoes

EUPPA - European Potato Processors' Association

www.euppa.eu

Snacks

ESA – European Snacks Association

www.esa.org.uk

Soft Drinks

UNESDA – Union of European Beverages Associations

www.unesda.org

Soluble & Roasted Coffee

ECF – European Coffee Federation

www.ecf-coffee.org

Spices

ESA – European Spice Association

www.esa-spices.org/

Sauce & Condiments

FIC – Federation of the Condiment and Sauce Industries

<http://fic-europe.org>

Spirits

CEPS – European Spirits Organisation

www.europeanspirits.org

Sugar

CEFS – European Committee of Sugar Manufacturers

www.cefs.org

Tea & Herbal Infusions

EHIA – European Herbal Infusions Association

www.ehia-online.org

ETC – European Tea Committee

www.etc-online.org

Yeast

COFALEC - Confederation of EU Yeast producers

www.cofalec.com

Major food and drink companies

BARILLA GROUP
CADBURY
CAMPBELL EUROPE
CARGILL
COCA-COLA
DANONE
FERRERO GROUP

GENERAL MILLS INTERNATIONAL
HEINEKEN
HEINZ
KELLOGG'S
KRAFT FOODS
MARS
NESTLE EUROPE

PEPSICO
PROCTER & GAMBLE FOOD PRODUCTS
SÜDZUCKER
TATE & LYLE
UNILEVER
ÜLKER

CIAA COMMITTEES

Food and Consumer Policy Committee

Chairperson

Geoff Thompson (Danone/ANIA)*

Steering Group

Michael Blass (FIAA)
Barbara Gallani (FDF)
Guido Kayaert (Nestlé/FEVIA)
Angelika Mrohs (BLL-BVE)
Daniele Rossi (FEDERALIMENTARE)
Dick Toet (Unilever/FNLI)
Pilar Velázquez (FIAB)

Expert Groups

INCIDENT MANAGEMENT

Mella Frewen (CIAA)

BETTER REGULATION

Dick Toet (Unilever/FNLI)

FOOD SAFETY MANAGEMENT & HYGIENE

Gunter Fricke (Nestlé) C
Dario Dongo (FEDERALIMENTARE) VC

CONTAMINANTS

Sam Lalljie (Unilever/FDF)

PROCESS CONTAMINANTS

Richard Stadler (Nestlé)

FOOD INGREDIENTS

INTAKE DATA COLLECTION
ADDITIVES CATEGORISATION
Lynn Insall (FDF)
Joy Hardinge (FDF)

MATERIALS IN CONTACT

John Horwood (FDF)

DECLARATION OF COMPLIANCE

Vacant

INTERNATIONAL STANDARDS

Irina du Bois (Nestlé/ECF)

NOVEL FOODS/GMO

Agnès Davi (Groupe Danone/ANIA)

R&D and SCIENCE

Daniele Rossi (FEDERALIMENTARE) C
Mike Knowles (Coca-Cola/UNESDA) VC

NANOTECHNOLOGY

Mike Knowles (Coca-Cola/UNESDA)

CONSUMER INFORMATION

Angelika Mrohs (BLL-BVE)

TECHNICAL AMENDMENTS ad hoc group

Isabelle Caelen (Nestlé)

GDA ad hoc group

Marta Baffigo (Kellogg's)

PORTION SIZES ad hoc group

Vanessa McConkey (General Mills International)

LEGIBILITY ad hoc group

Mark Caulfield (Kellogg's)

ADDITION OF NUTRIENTS task force

Marta Baffigo (Kellogg's)

MAXIMUM LEVELS ad hoc group

Marta Baffigo (Kellogg's)

NUTRITION AND HEALTH CLAIMS task force

Anne Heughan (Unilever/IMACE)

GUIDANCE ad hoc group

Eva Hurt (Nestlé)

Competitiveness Committee

Chairperson

Ruth Rawling (Cargill)

Steering Group

Murk Boerstra (FNLI)
Damiano Di Natale (Soremartec-Ferrero/FEDIL)
Horacio González Alemán (FIAB)
Bruno Guichart (FIAB)
Peter Hofland (Cargill)
Willem-Jan Laan (Unilever/IMACE)
Susanne Langguth (Südzucker/BLL-BVE)
Bénédicte Masure (EDA)
Bart Vandewaetere (Nestlé/EDA)

C: Chairman

VC: Vice-Chairman

*: Company or Association/Nominating member

Expert Groups

AGRICULTURAL POLICY

Susanne Langguth (Südzucker/BLL-BVE)

BIOFUELS task force

Willem-Jan Laan (Unilever/IMACE) VC

IMPORT/EXPORT PROCEDURES

Damiano Di Natale (Soremartec-Ferrero/FEDIL) C
Peter Hofland (Cargill) VC

TRADE

Bénédicte Masure (EDA) C
Bart Vandewaetere (Nestlé/EDA) VC

COMMERCIAL RELATIONS

Horacio González Alemán (FIAB)

ECONOMIC RESEARCH & ANALYSIS

Murk Boerstra (FNLI)

Environmental Sustainability Committee

Chairperson

Pascal Greverath (Nestlé/ETC)

Steering Group

David Bellamy (FDF)
Ann Nachtergaele (FEVIA)
Cees-Jan Adema (PepsiCo)
Franki Grilli (Ferrero)
Paloma Sanchez (FIAB)
Mark Caulfield (Kellogg's)
Anna Vainikainen (ETL)
Jean-Pierre Renaud (Danone)
Thomas Ingermann (Kraft Foods)
Joop Kleibeuker (EDA)
Yves Buchsenschutz (Danone/ANIA)

Expert Groups

CLIMATE

Paul Gardiner (British Sugar/CEFS)

SUSTAINABLE CONSUMPTION AND PRODUCTION

Pascal Greverath (Nestlé/ETC)
Philippe Diercxsens (Danone/FEDIL)

INTEGRATED POLLUTION PREVENTION AND CONTROL

Vacant

PACKAGING

Franki Grilli (Ferrero)

REPORTING

Thomas Ingermann (Kraft Foods)

WASTE

Joop Kleibeuker (EDA)

Communications

COMMUNICATIONS ADVISORY GROUP

Paul Fitzsimmons (Kellogg's)

COMMUNICATIONS NETWORK

Paul Fitzsimmons (Kellogg's)

Task Forces

DIET task force

Lyn Trytsman-Gray (Kraft Foods)

ADVERTISING AND MARKETING sub-group

Jeanne Murphy (Ferrero)

MONITORING AND REFORMULATING working group

Sylvie Chartron (Mars/ANIA)

FOOD TAXES

Truus Huisman (Unilever)

Experts from national federations, European sector associations and companies make up CIAA's Committees and Expert Groups. They work together using their specific relevant expertise to follow various dossiers, analysing particular issues, with the objective of finding a common CIAA position.

As of April 2010

THE EU FOOD AND DRINK INDUSTRY IN FIGURES

Turnover
€965 billion
(+3.2% compared to 2007)

Largest manufacturing sector in the EU (12.9%)



Employment
4.4 million people
(+0.8% compared to 2007)

Leading employer in the EU (13.5%)

Number of companies
310,000¹
Fragmented industry

of which over
99% are SMEs²
the latter accounting for
48.7%
of food and drink turnover and
63.0%
of employment in the sector



(1) 2007 data (CIAA Data & Trends 2009)
(2) 2006 data (CIAA Data & Trends 2008)

External trade

Exports

€58.2 billion
(+6.4% compared to 2007)

Imports €57.1 billion

(+8.4% compared to 2007)

Trade balance €1.1 billion

Net exporter of food and drink products

EU market share of global export market

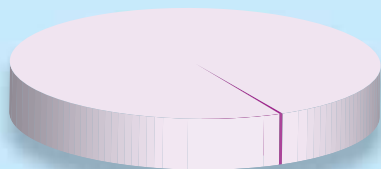
17.5%

(24.6% in 1998)

Shrinking share of EU exports
in global markets

R&D

(% of food and drink output)

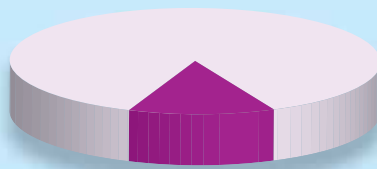


0.37%³

Insufficient R&D expenditure

Consumption

(% of household expenditure)

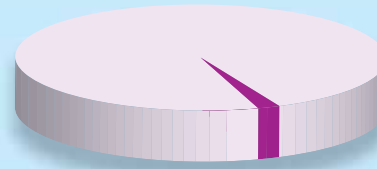


13%

Slight increase

Value added

(% of EU GDP)



2%

Stable

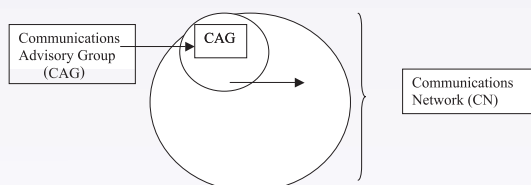
(3) EU 15 figure in 2006

COMMUNICATIONS

A new communications structure within CIAA

The last 12 months has seen the creation of a new structure within CIAA to deal with communications activities: the Communications Advisory Group and the Communications Network. This new structure enables CIAA to deal proactively and rapidly with communications across all areas of its work, beyond those dealt with in the past under the remit of the Diet Task Force subgroup on Communications.

The Communications Advisory Group or 'CAG' consists of a small, core group of communications and public affairs experts and acts as the driving force for communications activities undertaken by the CIAA. CAG members meet several times a year and report back to the members of the Communications Network. The Network meets once every six months both to input into the work of the CAG and disseminate information more widely throughout the industry.



An overview of the activities undertaken via this new structure throughout the course of 2009 are set out below.



An 'event full' year

In the first half of the year, CIAA marked the 4th anniversary of the **EU Platform for Action on Diet, Physical Activity & Health (DPAH)** with its annual dinner debate on 29 April. Robert Madelin, Director General for DG Health and Consumers of the European Commission participated as keynote speaker. Magnus Scheving, Iceland's celebrity presenter from the children's hit TV series 'LazyTown' gave a guest speech which stressed the need to motivate young people to live a healthy lifestyle by eating a balanced diet and taking part in physical activity. His messages provided a clear link to the recent shift in focus of EU Platform commitments to include actions in the field of physical activity.



The participation of the CIAA at an event organised in May by the **Czech Presidency** for members of the Council Working Party on foodstuffs enabled CIAA members to establish contacts with officials from a number of national health ministries and Permanent Representation offices. The event was attended by a host of key stakeholders and provided the occasion to convey the European food and drink industry's key messages on the food information proposal.



Similarly, during the **Swedish Presidency**, members of the Council Working Group were invited to attend a CIAA event in October. The event provided an innovative way of communicating with this group of stakeholders whereby Council Working Group members, participants from the European Commission and industry representatives were divided into teams to take part in an interactive nutrition quiz. The quiz was followed by an opportunity for EU

sector organisations to present their individual portion sizes for the purposes of GDA labelling and explain their rationale to external guests.

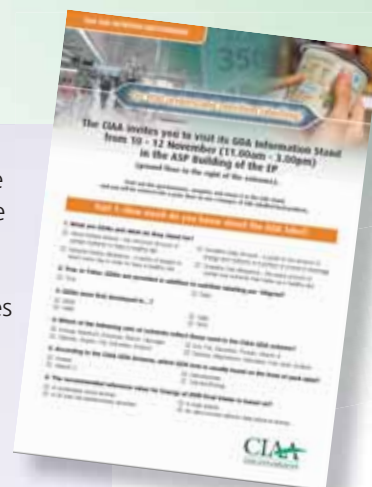
In July, CIAA held a profile-raising event to mark the election of the organisation's first **President** from an SME¹. Jesús Serafín Pérez is the CEO of the Spanish-based company, *Aguas de Fuensanta*, as well as President of the Spanish Food and Drink Industry Federation, FIAB. The event was well attended by key stakeholders from European institutions and representatives of organisations from along the food supply chain. A press release following the event ensured that the election of the organisation's new President and creation of a new 'CEOs-only' Board was widely communicated.

The last twelve months has also seen a new legislature of the European Parliament enter into force post-elections in June. Entering its 10-year anniversary, the **CIAA Annual European Parliament Reception**, held in the Members' Salons in September, provided an ideal opportunity for EU food and drink manufacturers to renew contacts with both returning and newly elected Members of the European Parliament (MEPs) from across the Union. The CIAA was honoured to have Mrs Dagmar Roth-Behrendt MEP, Vice-President of the Parliament, as host for the evening. The CIAA President, Jesús Serafín

Pérez, also spoke at the event stressing the importance of preserving and boosting the competitiveness of the EU food and drink industry. The speeches were followed by the opportunity for industry representatives to discuss issues of importance to EU food and drink manufacturers with over 40 MEPs from across the national and political spectrum.

Promoting the awareness and benefits of Guideline Daily Amounts (GDAs)

In November, CIAA organised an **Information Stand on Nutrition Labelling** in the European Parliament, to provide information on the CIAA voluntary GDA scheme to key decision-makers. The event was very successful with high levels of visitors recorded at the Stand over the course of the three days, providing CIAA with an opportunity to gather information on the levels of understanding about current EC nutrition labelling rules and the industry's GDA scheme via a nutrition questionnaire. The 'GDA Quiz' proved extremely popular with a total of 450 entries submitted by participants. Entrants successfully completing the questionnaire were then entered into a prize draw at the end of each day to win a hamper of GDA labelled products.



GDA Quiz

Reinforcing the industry's on-line presence...

The **CIAA website** (www.ciaa.eu) remains a comprehensive and up-to-date source of information for news about the latest CIAA-related activities: 2009 proved a highly successful year with over 500,000 unique visitors recorded! CIAA also boasts ownership of a number of important issue-specific sub-sites from the Managing Environmental Sustainability site (<http://envi.ciaa.eu>) to the European Technology Platform for food website (<http://etp.ciaa.eu>).



¹ A company listing less than 250 employees and with a turnover of less than or equal to €50 million.

In 2009, CIAA also launched the revamped version of the **GDA website** (<http://gda.ciaa.eu>) dedicated to explaining and promoting the use of the GDA scheme among consumers and encouraging the uptake of GDAs among 'Operators' in a separate part of the site. This site has been an active portal for disseminating the latest information on GDAs, their rollout across Europe and the efforts of CIAA members in successfully implementing the scheme over the past year.

In 2009, articles from the CIAA featured in all six issues, including titles such as: *'Foods of the Future'*, *'Sustainable Consumption: How green is your dinner?'* and *'New website boosts understanding and uptake of GDA nutrition labelling'*.

Furthermore, since November 2009, Mrs. Mella Frewen, the CIAA Director General, has been appointed as a member of the publication's Editorial Board.

Media Partnership: Food & Beverage International Magazine

A responsible and committed industry...



In 2009, EU food and drink industry manufacturers have been active in continuing to meet their commitments pledged under the **EU Platform for Action on Diet, Physical Activity and Health**³.

The results of the second CIAA monitoring results following an independent survey of over 1,500 food and drink companies in five representative European markets, were presented at an EU Platform meeting in December. A short glossy brochure⁴ summarising the key findings of the survey was also published and proved extremely useful in promoting awareness of CIAA members' continued efforts in the field of product reformulation and innovation, food labelling and greater product choice and packaging size.

In February, CIAA signed a media partnership with **Food & Beverage International**², the leading magazine for food and beverage manufacturers in Europe, published 6 times a year. The CIAA feature article brings news on our activities and key issues of importance to European food and drink manufacturers to over 13,000 professionals and CIAA members. The publication provides coverage of the latest processing, packaging, ingredients and food safety developments, as well as industry trends and industry and market news. This media partnership provides an invaluable opportunity for the CIAA to communicate on developments within the organisation and its membership covering a wide range of different issues.

The short brochure together with an informative Press Release were published on the CIAA website and disseminated to key media contacts. This sparked increased interest in the activities and achievements of food and drink manufacturers in Europe among members of the press prompting one-on-one media briefings and a host of interesting press articles.

² <http://www.foodbev.com>

³ http://ec.europa.eu/health/ph_determinants/life_style/nutrition/platform/platform_en.htm

⁴ <http://www.ciaa.be/asp/documents/brochures.asp>

Transforming existing and developing new materials...

Alongside the regular CIAA publications (the Annual Report, EU Presidency Priorities, the Data & Trends Report, etc.), a number of new, targeted brochures were produced in 2009 aimed at better informing EU policy-makers, key stakeholders and CIAA members about both the organisation and its activities.



CIAA Monitoring Survey



Who is Who leaflet

A 'Who is Who' welcome leaflet introducing the CIAA, its membership and main activities was distributed to all Members of the European Parliament (MEPs) following the June elections. This short leaflet was sent with a personalised letter to key MEPs and proved highly successful in boosting the visibility of CIAA members. The outreach activity subsequently lead to a number of follow-up requests from MEPs seeking meetings with CIAA representatives.

CIAA will continue to explore and identify innovative communications tools that successfully transmit industry key messages in a visual and effective way while reviewing and improving the existing mix of tools used throughout the year to ensure that they meet the aims of the membership and provide relevant, timely insights into its activities for key stakeholders.

Looking forward...

The Communications Network and Communications Advisory Group will continue to play an instrumental role in 2010, defining new challenges for CIAA and helping with the organisation of the CIAA Congress 2010.

By expanding on this way of thinking and incorporating fresh, fun and sometimes adventurous ideas (such as the GDA postcard campaign, the Nutrition Information Stand in the European Parliament and the Council Working Group quiz night), the CIAA hopes to successfully increase its visibility and outreach within both the political arena and among members of the press.

The Network will define and agree on the major communications milestones for Europe's food and drink industry over the coming year and will identify further profile-raising opportunities for both the CIAA as an organisation and members of the food and drink industry.



COMPETITIVENESS



High Level Group on the Competitiveness of the EU Agri-Food Industry

Background

The High Level Group (HLG) on the Competitiveness of the EU Agri-Food Industry was established by the former European Commission Vice-President, Commissioner Verheugen in June 2008. By July 2009, the Group had adopted three documents: (i) a Report, (ii) a list of 30 Recommendations and (iii) a Roadmap outlining a set of accompanying actions - all of which aim at boosting the performance of the European food and drink sector and achieving predictable and stable framework conditions for growth in the years to come. The entire process was validated in September 2009 by both the Agriculture and the Competitiveness Councils.

Achievements

CIAA played an active role in the process of the HLG's work by providing input to the various working groups and meetings of the

Sherpa Group¹. In particular, CIAA compiled a comprehensive document entitled 'CIAA Policy Recommendations' outlining the industry's vision and recommendations for the outcome of the Group's work, input which was clearly reflected in the final Recommendations of the HLG.

CIAA and its members are particularly pleased with the adoption of the HLG Roadmap, which gives the Policy Recommendations added weight and ensures that they are translated into deliverable actions.

Challenges

The first stage of the process in the HLG's work has been accomplished. The next steps include prioritising and monitoring the implementation of the Recommendations, most notably, (i) ensuring a holistic approach and consistency across policies; (ii) the better functioning of the food supply chain in Europe; (iii) the development of the Sustainable Consumption and Production Round Table; (iv) the functioning of the incident management system; and (v)

¹ The Sherpa Group was created to assist the HLG members in their discussions.

nutrition information to consumers, given that SMEs represent 99.1% of Europe's food and drink manufacturers, the challenges facing this part of the sector also warrant close consideration.

Finally, CIAA counts on the continued support of the European Commission in overseeing the swift implementation of the HLG Recommendations.

Food supply chain

Background

Further to price fluctuations in agricultural, food and consumer prices in 2008 and 2009², the European Commission launched an analysis of the functioning of the food supply chain and monitored food price developments. In October 2009, the European Commission published its conclusions in the Communication 'A better functioning food supply chain in Europe'³, followed by the publication of the 'Food price monitoring tool - a first design'. The Communication sets out 10 Recommendations aimed at improving relations along the food chain to increase transparency and enhance levels of harmonisation throughout the Single Market.

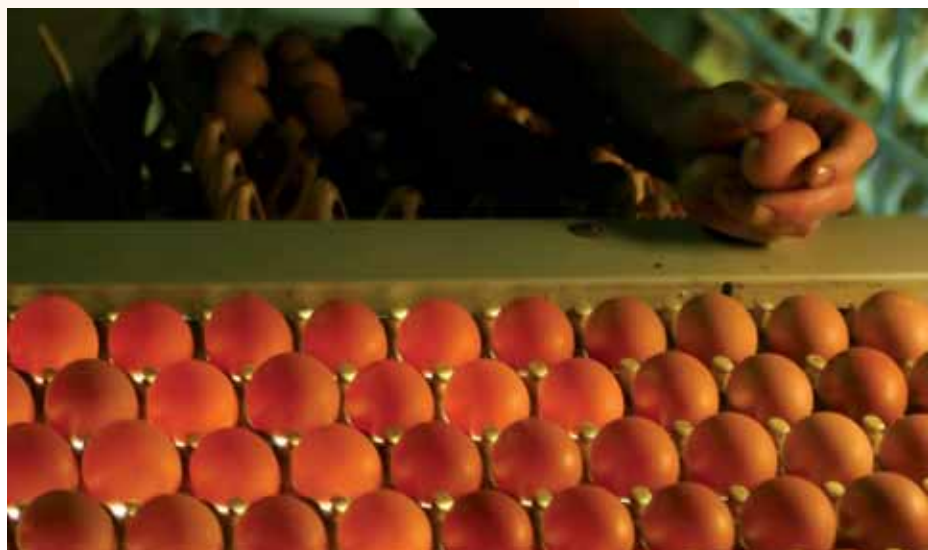
Achievements

CIAA met with the Commission in order to analyse and discuss the food supply chain Communication. This provided the opportunity to emphasise the structural problems within the food supply chain, namely, the market power of food retailers and the proliferation of unfair practices of contractual and commercial nature. CIAA also continued to monitor prices of agricultural raw materials and the impact of price changes of raw materials on the food supply chain. The Commission recognised that both food and agricultural raw material prices declined, unlike consumer prices that remained disproportionately high for a long period of time.

The Communication reflected the CIAA view that better relations within the food supply chain would improve the competitiveness of food and drink manufacturers and would ultimately bring benefits to consumers. Moreover, CIAA actively followed the European Parliament's Working Group on Retailers and the Food Supply Chain in addition to the Committee on Agriculture and Rural Development, as well as the Agriculture and Fisheries Council.

Challenges

The Commission has put forward several policy actions, such as to stamp out unfair practices and to study territorial supply chain restraints. Policy developments are also expected in the area of agricultural commodity derivatives. The Commission will present a Report on the Implementation of the Recommendations of the Food Supply Chain Communication in November 2010. Meanwhile, CIAA will continue to monitor relations along the food supply chain in all EU Member States, including the proliferation of unfair commercial practices and the increased use of private labels.



² Agricultural commodity prices decreased, followed by food prices, while consumer prices remained at a relatively high level for the period Aug 2008 – June 2009, Eurostat, Agriviews 2009.

³ http://ec.europa.eu/economy_finance/articles/structural_reforms/article16028_en.htm



Late payments

Background

In February 2009, the European Commission drafted a proposal for the recast of the 2000/35 Directive on Late Payments and grossly unfair practices, which aimed at limiting late payments in commercial transactions.

Achievements

CIAA considered the recast Directive as an opportunity to effectively tackle late payments as well as unfair contractual and commercial practices within the food supply chain. As a result, CIAA has adopted an ambitious position requesting for the scope of the Directive to be extended to unfair commercial practices and to provide a clear and extended definition of what constitutes a 'late payment'.

Challenges

This proposal is currently under discussion in the European Parliament. CIAA will continue to liaise with Committees to ensure the right balance between the principle of contractual freedom and protection of small, medium and large companies alike, is respected.

Small Business Act

Background

In 2008, the European Commission published its Small Business Act (SBA), to cut administration 'red tape' and help small businesses thrive. Under the SBA, the European Council presented a set of initiatives and asked the Commission to adopt a Communication as swiftly as possible. The SBA underlines the importance of SMEs for the competitiveness of the EU economy and the need for adequate access to finance so as to exploit opportunities provided by the Single Market and external trade.

Achievements

CIAA continues to monitor the implementation of SBA principles in areas of policy-making. In particular, CIAA has developed a position paper and is actively liaising with MEPs on the recast of the Late Payments Directive, a part of the SBA, as SMEs are often subject to issues such as long contractual terms, late payments and unfair commercial practices, mainly due to the imbalance of market power along the food supply chain.

Challenges

Implementation of the SBA recommendations is an ongoing process and will continue until 2013 in some cases (e.g. enhancing SMEs financing opportunities through the European Investment Bank). CIAA will continue to closely work with the relevant EU institutions in order to create sufficient safeguards for small, medium and large companies within the scope of the recast of the Late Payments Directive, which is expected to be finalised in 2010.

INTERNATIONAL TRADE



Multilateral trade negotiations

Background

Multilateral negotiations under the Doha Development Agenda (DDA) will enter into their tenth year in 2010 without any clear prospect of a swift conclusion. The 9th WTO Ministerial Conference at the end of 2009 did not lead to the reopening of the deadlocked discussions. 2009 did, however, mark the end of a 10-year disagreement between Latin-American banana producers and the EU, allowing the DDA to progress on other related dossiers.

Achievements

The current situation is clearly disappointing for European food and drink manufacturers; nevertheless, we maintain our support in concluding a balanced, multilateral agreement at the WTO. Therefore, despite modest progress during the year, CIAA has kept in close contact with EU negotiators and representatives of the major non-European partners in Geneva. The EU industry's interest in concluding the Round and concerns of the Members regarding a

number of difficult issues were conveyed on several occasions. As a sign of support to the multilateral approach, CIAA co-organised a conference session at the WTO Public Forum in September 2009, and was present in Geneva during the Ministerial Conference at the end of last year.

Challenges

CIAA believes that the DDA can only be concluded on the basis of the current agreed texts. This does not mean, however, that European food and drink industries are completely satisfied with the existing proposal. Outstanding issues remain open or unsatisfactorily addressed. For example: provisions regarding tariff simplification; choice of tropical and special products; the time-frame for phasing out export refunds; and lack of progress on Geographical Indications (GIs) and differential export taxes. Europe's food and drink industry looks forward to the delivery of a number of necessary technical solutions and in particular, a renewed political momentum, which is essential for the conclusion of the Round.



Bilateral Negotiations

Background

Set against the background of the current impasse in the DDA discussions, bilateral negotiations have become a key element of the EU strategy to secure enhanced access to foreign markets for European products. The EU has been involved in Free Trade Agreement (FTA) negotiations with a large number of countries worldwide. Further negotiations were pursued in 2009 with India, Ukraine and the Andean Community¹, ASEAN² and ACP³ countries, to name but a few. The negotiating process advanced more smoothly in some countries than in others. Such was the case of the EU-Korea FTA. Negotiations were also launched with new partners, Canada for example.

Achievements

The EU food and drink industry has followed closely the negotiation process with several EU partners. During the year, CIAA reflected on and discussed the food and drink sector's priorities for the FTA negotiations, especially with India, ASEAN countries, Canada and Libya, and position papers were conveyed to the European Commission's negotiators at several

informal meetings. CIAA also expressed its strong support of the bilateral agreement with South Korea, which offers enhanced access to this important high-value market for European food and drink products. CIAA members welcomed the outcome of the successful negotiations with South Korea as one of the most important trade developments for our industry in 2009. Key highlights from this Agreement include: the provision for tariff reductions, protection of geographical indications (GIs) and a consultation framework on SPS matters.

Challenges

Conscious of the intricacies and obstacles that pave the way to an agreement in the multilateral talks, CIAA encourages the conclusion of on-going EU free trade negotiations. FTAs should provide an improved framework on food safety standards (SPS) and other food regulatory issues, reduce burdensome customs procedures, improve protection of intellectual property rights (including GIs) and promote international standards in partner countries. In the absence of a multilateral agreement, FTAs should also aim to eliminate the remaining high import tariffs in partner countries. Therefore, to enhance the competitiveness of the EU agri-food industry, the EU institutions should approve the EU-Korea agreement. Progress is needed, also, in on-going negotiations with Ukraine, India, Canada and the ASEAN countries ready to engage in the new bilateral approach.

¹ Andean Community: Bolivia, Colombia, Ecuador and Peru.

² ASEAN countries: The Association of Southeast Asian Nations is a geo-political and economic organisation of 10 countries (Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand and Vietnam).

³ ACP countries: The African, Caribbean and Pacific Group of States is a group of 79 countries of which 48 are African, 16 Caribbean and 15 in the Pacific.

Fair Trade and other sustainability assurance schemes

In response to significant market growth of certifiable goods, the European Commission issued its second Communication 'Contributing to Sustainable Development: The role of Fair Trade and non-governmental trade-related sustainability assurance schemes' in May 2009. The Communication triggered a useful reflection within the CIAA on the different attitudes adopted by industry in communicating to consumers its strong commitment to sustainability - in its social, economical and environmental dimensions. CIAA recognised the positive role for a variety of existing sustainability schemes (such as Fairtrade, Rainforest Alliance, UTZ certified, etc.) in generating awareness of environmental and socio-economic conditions in the raw material production of some commodities (coffee, cocoa, etc.), provided these schemes are credible, transparent and not misleading.

Bilateral relations and access to world markets

Background

Bilateral regulatory dialogues represent an effective way in which to tackle technical and SPS obstacles to trade, both old and new. Existing forums created by the EU should be employed to resolve delicate trade issues, especially with major EU food trade partners - such as the US, Russia and China. Moreover, existing barriers with a wide range of other countries can and should be tackled by taking advantage of the synergy created via discussions and information exchanges between the European Commission, Member States and industry players. In this regard, the Market Access Partnership has proved increasingly efficient in successfully leading to the opening up of foreign markets to European products.

Achievements

The threat of the 'carousel law' and potential increased US sanctions resulting from the so-called 'beef hormone' case were foreseen as possibly the greatest challenge for the EU food and drink industry in bilateral trade relations over the past year. However, the agreement reached by the Commission in May 2009 prevented the further deterioration of trade conditions. It also opened up the way for the progressive dismantlement of the retaliatory duties heavily affecting access for European food products to the US market. This important development was followed by several other market access success stories around the world (e.g. the end of the Avian Influenza-related ban on EU poultry and pigmeat in India and the end of the novel-flu related ban on pigmeat in Belarus). CIAA actively contributed to the exchange of information between the institutions

and industry and supported the Commission in its efforts to restore normal trade flows and the prevention of new barriers to trade.

Challenges

The work priorities of the EU Market Access Strategy have been recently defined in the key barriers lists for particular countries. Many of these lists include food industry-specific issues. CIAA hopes that the cooperation within the Partnership will translate into tangible economic gains for EU food and drink producers in the months and years to come. At the same time, the American market, and especially the Russian market, should be given due attention from the European institutions in order to prevent new and, where possible, reduce existing barriers.





Promotion of agri-food products

Background

In 2007 and 2008, the Community regime on promotion measures⁴ for agri-food products on the internal market and in non-EU countries underwent technical simplification. However, this process did not enshrine the changes necessary for an efficient functioning of this regime to the benefit of European food and drink manufacturers.

Achievements

Throughout 2009, CIAA has responded positively to all of the European Commission's initiatives by stressing the need for improvements to the current legislation, providing technical input, participating in the newly created 'Working Group on Promotion' and, finally, by submitting some suggestions for a seminar on this subject in 2010. During this process, CIAA continually liaised with other key stakeholders along the

food chain, most notably Copa-Cogeca and Celcaa, the European organisations representing EU farmers and agri-food trade.

Meetings of the Working Group provided a good opportunity for CIAA to highlight the changes that are considered necessary from a food and drink manufacturer perspective – for example, in the current administrative procedures, management during the execution of programmes, the scope of the regime in terms of products and the balance between generic product promotion and trademarks.

Challenges

Despite efforts made by DG Agriculture and Rural Development in the elaboration of some guiding documents, CIAA has been disappointed by the lack of an appropriate response from the Commission on this important subject. A number of rules governing EU promotion policy continue to jeopardise the objectives of the Community regime.

⁴ http://ec.europa.eu/agriculture/prom/index_en.htm

SUPPLY IN AGRICULTURAL RAW MATERIALS

The Common Agricultural Policy (CAP) beyond 2013

Background

Further to the political agreement on the 'Health Check of the CAP' in November 2008, Council regulations were officially published in 2009 and 'Health Check' measures implemented. The debate on the future shape of the CAP beyond 2013, launched by the French Presidency at the Informal Council held in Annecy in September 2008, was later pursued in 2009 - most notably with regard to the future of direct payments at an Informal Council held in Brno (Czech Republic) in May 2009.

Achievements

Based on the interventions of the Commissioner for Agriculture and Rural Development, Fischer Boel, and on initial views of some Member States, CIAA launched the debate on the future of the CAP within the organisation and its membership at the end of 2008. In 2009, a number of CIAA members provided their preliminary reflections on the future shape of the CAP. This enabled CIAA to determine its priorities on the CAP after 2013.

European food and drink manufacturers use 70% of agricultural production in the EU, making the sector one of the biggest players in the food supply chain. Thus, CIAA identified three key guiding principles: security of supply, sustainability, and market-orientation. The EU food and drink industry relies on access to adequate supplies of safe and sustainable agricultural raw materials that correspond to specific quality criteria and that are competitively priced. This is a key factor for ensuring the long-term competitiveness of the industry. For CIAA, only a market-oriented CAP can contribute to achieving this goal in the coming decade. The priorities of the industry in relation to the CAP after 2013 have enabled CIAA to contribute to the ongoing debate.



Challenges

The European Commission intends to publish the Communication, 'CAP after 2013', by the end of 2010, in order to launch a full public consultation. In the meantime, the debate will intensify in different fora (including EU institutions, Member States and other key stakeholders). In view of taking part in these discussions, CIAA will work on some specific issues of the CAP, such as market mechanisms and decoupled payments in the course of 2010.

In parallel to the CAP dossier, CIAA will monitor discussions on the next Financial Perspectives¹. A first draft Communication on the EU Budget Review received strong criticisms from some parts of the European Commission, and was subsequently withdrawn in October 2009. This dossier will be a priority for the new European Commission.

¹ The EU's 'Financial Perspective' defines the framework for the Community's budget priorities over a period of several years.

Biofuels

In December 2008, the European Parliament and the Council approved the Directive on the promotion of the use of renewable energy supplies. In particular, the Directive states that the share of energy from renewable sources in all forms of transport must reach at least 10% of final energy consumption in every Member State by 2020. The absence of a formal review clause for this 10% target, a comprehensive impact assessment and the lack of sub-targets, was deeply regretted by the European food and drink industry.

In 2009, Member States began preparing their National Action Plans to be submitted to the European Commission by June 2010. CIAA members were invited to get involved in discussions at national level, for example, via stakeholder advisory groups or public consultations, in view of communicating the food and drink industry's concerns. It is essential for the food and drink sector that the increasing share of feedstocks used to fulfil the 10% renewable energy target, does not compete with the raw materials required by the food and feed industry. Therefore, the food and drink industry supports the setting of specific targets at national level to promote the use of electricity, hydrogen and second generation biofuels.

In May 2009, further to discussions within Council working groups, the Commission released the Communication on the agricultural product quality policy, accompanied by a number of impact assessments. This Communication led to a fruitful debate within the relevant expert groups and CIAA approved a comprehensive position in November 2009 addressing the different parts of the Communication. In particular, CIAA stressed that the 'place-of-farming' labelling should be decided on a case-by-case voluntary basis and should not become a mandatory requirement. CIAA also opposed the proposed merging of the existing separate systems for wines and spirits and agricultural products and/or PDO/PGI instruments². CIAA welcomed the Commission's intention to develop voluntary guidelines for the operation of certification schemes.

CIAA has closely followed the debate in the European Parliament on this dossier. On several occasions, the industry communicated EU food and drink manufacturers' priorities, most notably on country of origin labelling, to MEPs in the Agricultural and Environment Committees.

Challenges

The Communication will pave the way for the preparation of the necessary proposals under the new Commission. In particular, the Commission will come forward with legislative proposals on geographical indications in the second half on 2010. In the meantime, as the political part of the dossier concludes, DG Agriculture and Rural Development has opened the floor for more technical input on various changes suggested in the Communication. CIAA will contribute to this important stage of the dossier, which will then be reflected in upcoming legislative proposals.

Quality of agricultural products

Background

The Green Paper on agricultural product quality, published by the European Commission in October 2008, was followed by a large public consultation. Receiving over 500 responses, stakeholders addressed several key issues set out in the Green Paper, such as product standards and farming requirements, quality assurance schemes, geographical indications and organic production.

Achievements

CIAA responded to the Green Paper by clearly detailing its position on the topics contained therein. Moreover, CIAA's President intervened at a high-level conference organised by the Czech Presidency in Prague in March 2009, which offered an ideal opportunity to highlight the food and drink industry's priorities on quality, a key issue for the competitiveness of the sector.

² <http://www.origin-food.org/pdf/pdo-pgi.pdf>

CONSUMER INFORMATION

Food Information to Consumers

Background

In January 2008, the European Commission adopted a proposal which seeks to revise the existing EU Labelling Rules, including the rules on nutrition labelling. This proposal was welcomed by the European food and drink industry in the spirit of better regulation. The aim of this new legislation on food information is to provide a basis of information for consumers to make informed choices as well as to achieve the free movement of goods within the European Union. The proposal contains a number of new additions: mandatory nutrition labelling, mandatory minimum font size, national labelling schemes and new provisions for country of origin labelling.

Achievements

- CIIA welcomed the recognition of its approach to nutrition labelling and, in particular, the Commission's support of the CIIA voluntary labelling scheme, Guideline Daily Amounts (GDAs) ¹.
- CIIA developed a position on mandatory nutrition labelling: the GDA icon for energy expressed per portion on the front-of-pack and the 'Big 8' nutrients back-of-pack per 100g/ml.
- CIIA extensively stepped up its communication activities with the Council and the European Parliament. A number of informative events and meetings were held during the year to communicate the industry position to key policy-makers - for example, a GDA Information Stand in the European Parliament and an event with representatives of the Member States to present the portion rationales developed by sectors for the purposes of GDA labelling.



Challenges

During the legislative process, one of the core challenges will be to achieve European-wide acceptance of the CIIA GDA scheme as a reliable, non-judgemental and objective system of nutrition information among all decision-makers. Explaining portions for the purposes of GDA labelling will also be key as the proposal makes its way through the co-decision process involving the European Parliament and Council. Finding acceptable solutions in relation to a number of other key concerns, notably national schemes, legibility and country of origin labelling, will also be crucial to ensuring a balanced regulation which guarantees the Single Market and free movement of goods, whilst protecting the legitimate interest of producers and enabling consumers to make informed choices.

¹ <http://gda.ciaa.eu>



Nutrition and Health Claims

Background

The Nutrition and Health Claims Regulation² aims to ensure that any claim made on a food is accurate and scientifically substantiated. The Regulation seeks to establish a harmonised regulatory framework that encompasses all types of claims - for example, 'low fat', 'high fibre', or disease risk reduction claims, such as 'reducing blood cholesterol'.

Achievements

CIAA supports the general objective of the Regulation and has focused its work throughout the year on the implementation of this dossier. CIAA actively worked with the European Commission and the Member States through its members on a variety of issues such as nutrition claims and health claims (Article 13.1, Article 14.1 and Article 13.5).³

CIAA presented its position on nutrition claims to stakeholders on numerous occasions throughout

the year, including the EFSA Stakeholders meeting⁴ in July. Member States were informed of the potential impact of nutrition claims on product labels as well as which claims could disappear from the market if rejected.

The Commission is currently in the final stages of revising two proposals to the nutrition claims Annex, to which CIAA actively contributed through the provision of examples, arguments, conditions of use, labels, products, etc.

2009 also marked the publication of EFSA's first batch of opinions on Article 13 claims (general nutrition health claims). CIAA welcomed this progress, as industry needs a commonly-agreed set of claims in order to be certain about which products can make claims across the European market. CIAA continues to closely follow developments in this area.

CIAA also continued to work actively on the issue of nutrition claims, Article 13.5 and Article 14 claims, and provided guidance to EFSA in preparing its dossiers.

Challenges

CIAA hopes to engage in further dialogue with the European Commission to ensure that:

- On nutrient profiles, a consistent approach is applied to all product categories and that the proposed approach is as comprehensive as possible; and
- EFSA opinions on Article 13 claims are appropriately reflected in the European Commission Proposal.

² http://ec.europa.eu/food/food/labellingnutrition/claims/index_en.htm

³ <http://www.efsa.europa.eu/en/nda/ndaclaims.htm>

⁴ <http://www.efsa.europa.eu/>

DIET, NUTRITION AND HEALTH

European Commission White Paper 'A Strategy for Europe on Nutrition, Overweight and Obesity-related health issues'

Background

The White Paper 'A Strategy for Europe on Nutrition, Overweight and Obesity-related health issues'¹ was published on 30 May 2007 and aims to set out an integrated European approach to reducing ill health due to poor nutrition, overweight and obesity. It highlights the complex nature of the obesity problem and identifies several fields of action both at the European and national level. The food and drink industry welcomed this approach and showed a significant engagement in the field of product reformulation, marketing communications and better consumer information. These initiatives were undertaken within the framework of the EU Platform for Action on Diet, Physical Activity and Health², and, among others, focus on the following commitments:

- Developing a Healthy Lifestyles Public Information Campaign (Green Lace Project); and
- Drafting a CIAA Recommendation for a Common Nutrition Labelling Scheme (Guideline Daily Amounts - GDAs).

Achievements

CIAA supports the important achievements of public-private partnerships already underway. Effective self-regulation and voluntary cooperation with stakeholders is the most effective way to combine resources for the successful promotion of balanced diets and physical activity among consumers. CIAA believes that the development of effective and well-defined partnerships among all relevant stakeholders, including public health authorities, must be the basis of the overall Community Strategy.



The causes of obesity and other lifestyle-related diseases are multifaceted. The White Paper acknowledges the integrated approach needed across all policy areas and activity levels. These policies range from food to consumer affairs, sports to education and transport issues, and no one sector or area is excluded. Furthermore, CIAA members fully support responsible marketing communications and have developed specific self-regulatory guidelines in this area (the EU Pledge)³.

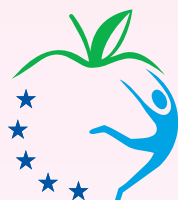
Challenges

CIAA will continue to build on its commitments to promote balanced diets and healthy lifestyles in Europe. In 2010, the European Commission will carry out a progress review to report on the incidence of obesity and the extent to which actors across the EU are contributing to the achievement of the objectives agreed in tackling this complex issue. Particular attention will be paid to industry self-regulatory measures and their impact in curbing obesity.

¹ http://ec.europa.eu/health/ph_determinants/life_style/nutrition/keydocs_nutrition_en.htm

² http://ec.europa.eu/health/ph_determinants/life_style/nutrition/platform/platform_en.htm

³ <http://www.eu-pledge.eu/>



EU Platform on Diet, Physical Activity and Health

European Platform for Action on Diet, Physical Activity and Health

Background

In March 2005, the European Commission launched the European Platform for Action on Diet, Physical Activity and Health (DPAH)⁴, the overall aim being to improve public health nutrition, promote healthy lifestyles and tackle the increasing public health threat posed by obesity across Europe.

The Platform is a successful forum, which brings together diverse stakeholders to share best practices and foster action in the following fields:

- Consumer information, including labelling;
- Education;
- Physical activity promotion;
- Marketing and advertising; and
- Composition of foods, availability of 'healthy' food options and different portion sizes.

The Platform has been a catalyst for action in many of the above areas and CIAA and its members have delivered concrete and specific commitments in each area for action, spanning over the last five years and beyond.

Achievements

In 2009, Platform members submitted 133 monitoring forms to report on their commitments, the majority of which came from the private sector.



One of the most ambitious steps taken so far by a Platform member was the CIAA's commitment to implement a voluntary nutrition-labelling scheme for the entire food and drink industry across all EU Member States. The scheme is based on internationally accepted and scientific Guideline Daily Amounts (GDAs)⁵, to promote balanced diets as part of an overall healthy lifestyle.

Moreover, another important commitment undertaken by CIAA is the launch and implementation of the 'Green Lace Project', which was initially proposed by CIAA under the Platform back in 2006 as a common multi-stakeholder commitment. CIAA, in partnership with other Platform members, notably the European Association of Communications Agencies (EACA)⁶, is developing a pilot public information campaign to communicate healthy lifestyle messages to 11-14 year old adolescents, using TV and a website, to create a youth community. The concept was tested on focus groups of young people in Lisbon and Prague and was well received. The project is being piloted in three countries (Portugal, Greece and Italy) and learnings will help to shape both the extension of the campaign to other Member States and the way in which public-private partnerships in this area might be organised in future.

The Platform demonstrates that voluntary measures are a fast and effective tool to promote balanced diets and healthy lifestyles, a role that has already been acknowledged in the Commission's White Paper on Nutrition.

⁴ http://ec.europa.eu/health/ph_determinants/life_style/nutrition/platform/platform_en.htm

⁵ <http://gda.ciaa.eu>

⁶ <http://www.eaca.be/>

Challenges

The results after five years of the process are evident and the European food and drink industry has started to monitor the compliance of its activities in a transparent and accountable way. Industry efforts will continue in this direction to contribute to and support the Platform as part of the overall European Nutrition Strategy.

Reformulation- Sodium

Background

The EU Framework for national salt initiatives⁷ emerged from two workshops run by national experts and organised by the European Commission. It was presented at a plenary meeting jointly organised by the High Level Group on Nutrition and Physical Activity and the EU Platform for Action on Diet, Physical Activity and Health in July 2008. The common goal is to support Member State initiatives to meet national and WHO⁸ guidelines for population salt intake.



From an initial list of 12 food categories, Member States have identified four as a priority, which represent the major sources of salt in the diet. These are bread, ready meals, cheese and meat products. The goal is to achieve a 16% reduction in salt over four years in these categories. The initial focus will be to work with the food industry within the EU, addressing intra-EU trade.

Achievements

In February 2008, a technical high-level discussion on reformulating/optimising sodium content in foods was held in Brussels. Following this meeting, the CIAA Working Group on product reformulation/optimisation has been working on an adopted mandate in this area (reformulation of salt in food) during the course of 2009. This



initiative have been undertaken in the context of the EU Platform and in light of the last developments at European Level (White Paper on Nutrition and the WHO European Action Plan for Food and Nutrition Policy).

The Commission organised a seminar on 'Salt in Bread: Technical, Taste and other Parameters for Healthy Eating' in October 2009 in Brussels. The meeting focused on the technological limitations of salt reduction in bread and the various experiences of several national salt reduction initiatives. CIAA drafted a response to DG Health and Consumers (DG SANCO) on the Framework delivering a clear and constructive message, but also highlighting the challenges for the European food and drink industry in this area. Food manufacturers all over Europe continue to pursue their efforts in the sodium reformulation/optimisation process taking into account taste, food safety, consumer acceptance and technological as well as legal constraints.

Challenges

The European food and drink industry is committed to continue investigating how to support reformulating/optimising the sodium content in food and encourage their members at the national level to work with health ministries to create a supportive environment for these initiatives.

⁷ http://ec.europa.eu/dgs/health_consumer/dyna/enews/enews.cfm?al_id=752

⁸ <http://www.who.int>

FOOD SAFETY



Food Safety Platform

The Food Safety Platform,¹ launched by CIAA in 2004, aims to facilitate the exchange of views between the main partners of the food chain on a diverse range of issues related to food safety.

The Food Safety Platform met three times during the course of 2009 to discuss issues of common interest, such as the functioning of the EU Rapid Alert System for Food and Feed (RASFF), nanotechnology, cloning, GMOs and emerging issues such as the presence of melamine in Chinese products. A representative from the European Food Safety Authority (EFSA) also attended one of these meetings with the aim of further strengthening the relationship between stakeholders and EFSA.

PREREQUISITE PROGRAMME (PRP)

International Organisation for Standardisation 22000 (ISO 22000) is a certifiable Standard for food safety management systems, published in 2005. It is largely built upon the Codex principles of Hazard Analysis and Critical Control Point (HACCP), but includes a requirement that each food business implements 'Prerequisite Programmes' (PRPs). These PRPs, however, are not specified.

In order to establish a common base for certification, a set of PRPs must already be in place, appropriate for each key stage in the food chain.

The British Standards Institute (BSI) published PAS 220:2008 'Prerequisite programmes on food safety for food manufacturing'. This Publicly Available Specification (PAS) sets out the requirements for PRPs, which assist in controlling food safety hazards, including areas such as the layout of premises and workspace, hygiene of personnel and product recall procedures.

Developed by the BSI, PAS 220 is largely based upon the requirements of Codex Alimentarius, but has, in

addition, been cross-referenced with existing industry practices by industry experts.

PAS 220 is designed for use by any organisation involved in the manufacturing step of the food chain, regardless of its size or complexity. The PAS is intended to be used in conjunction with BS EN ISO 22000 Food safety management systems.

In September 2009, the first meeting of the ISO Sub-Committee (SC) for Food Safety Management (SC 17), in which CIAA was represented, took place. CIAA has now applied for an official observer status in order to ensure permanent representation.

FSSC 22000 was developed in order to combine ISO 22000 and PAS 220 into one certification scheme.

Food Safety System Certification (FSSC) now owns this certification scheme, and is responsible for accreditation of registrars and management of the scheme.

FSSC 22000, and, therefore, subsequently, PAS 220, is provisionally approved by the Global Food Safety Initiative (GFSI).²

¹ The core membership of the Platform consists of the following European sector organisations: Farmers/Cooperatives: COPA-COGECA; Agri-food Trade: CELCAA; Feed Producers: FEFAC; Food Producers: CIAA; Retail/Wholesale/Import/Export: EuroCommerce; Food Service: EMRA; Consumers: BEUC.

² The goal of the Global Food Safety Initiative (GFSI), which is a global food network made up of approximately 400 retailers and manufacturers worldwide (<http://www.ciesnet.com>) is to provide convergence between food safety standards and establish a benchmarking process for the different food safety management schemes. The goal is 'Once certified, accepted everywhere' subsequently eliminating the time expense involved in duplication of audits.

Food Hygiene

Background

The EU's legislative 'Hygiene Package'³, which entered into force on 1 January 2006, aims to merge and simplify complex hygiene requirements which had previously been spread across seventeen Directives. The European Commission completed a report on the implementation of the Package and is currently considering the possibility of introducing proposals to amend the legislation.

Achievements

CIAA continued to actively liaise with the Commission throughout 2009 on issues such as the potential impact of the hygiene requirements on the availability of fish oil, DHA-rich oil in particular, for use in infant formula and formula for special medical purposes in Europe. The Commission has since agreed to request an EFSA Opinion regarding fish oil for human consumption.

Challenges

Although the hygiene package generally benefited food business operators, it identified some areas where there is room for improvement. CIAA, therefore, remains committed to working with DG SANCO to ensure both a successful review of the package, based on scientific risk assessment, and a consistent and workable approach to the implementation of legislation across the food chain.



Food Ingredients

Background

The new Regulations on food additives, food enzymes, flavourings and food ingredients with flavouring properties, as well as a common authorisation procedure, entered into force in January 2009.

Achievements

CIAA welcomed the package of proposals and supported the European Commission's intention to ensure coherence with respect to the framework that has already been in place for over 15 years. During its development, CIAA worked in close cooperation with the Commission and relevant stakeholders.

Challenges

CIAA views the revision of the additives legislation as a positive development. However, certain requirements, such as warning labels that are placed on products containing the food colours featured in the 'Southampton Study'⁴, have raised concerns due to the lack of scientific substantiation in some respects. CIAA

European Food Safety Authority

The European Food Safety Authority (EFSA)⁵ has provided independent scientific advice on matters linked to food and feed safety since 2002. Since its existence, EFSA has built up a reputation of independence and credibility. CIAA is an active member of EFSA's Stakeholder Consultative Platform. Geoff Thompson is a Vice-Chair and CIAA's representative within the Platform.

CIAA members continue to actively contribute to the various additive-usage data collections for the re-evaluation of food additives, and CIAA also contributed to the data submission of analytical data on melamine and structural analogues in food, which is necessary to assess the occurrence of potential background contamination of the substance in food.

³ http://europa.eu/legislation_summaries/food_safety/index_en.htm

⁴ http://www.soton.ac.uk/mediacentre/news/2007/sep/07_99.shtml

⁵ <http://www.efsa.europa.eu>

believes that this sets a dangerous precedent in policy-making: not only does it seriously undermine the value of scientific risk assessments as a policy tool, but it demonstrates also that EU legislation may not always be based on scientifically proven food safety concerns. As a direct result, laws become unpredictable, legal certainty decreases and the industry's competitiveness will suffer unnecessarily.

Additional Activities and Initiatives

- **Food additives categorisation:** CIAA continues its involvement in the European Commission Working Group responsible for the development of Annex II of the new Regulation on food additives. The work is devoted to the development of a food categorisation system and to transfer the existing additives' authorisations.
- **Interpretation Guidelines:** In close cooperation with its membership and relevant stakeholders, CIAA is developing a set of Interpretation Guidelines on the new Regulations. This activity aims at achieving a European-wide harmonised interpretation of the new Regulations, among industry, national authorities and the Commission.
- **Intakes:** CIAA continues to be actively involved in the work of the European Commission Ad Hoc Working Group on intake assessment, in collaboration with Member States and other sectors along the food chain. CIAA carried out a comprehensive Intake Data Collection Exercise, which collated, among other information, a set of data on typical usage concentrations of more than 50 food additives that are currently authorised in about 600 foodstuffs.
- **REACH⁶:** Although food is not included within the scope of REACH, CIAA monitored developments that might have an impact on the food industry.
- **FACET⁷:** CIAA is one of the key project partners in the EU funded R&D project FACET. The project aims to develop a tool for the estimation of probable exposure to food chemical intake. CIAA is mainly involved in the 'Additives' group and is actively contributing to define the priority additives to be studied and providing information on usage levels throughout Europe.

6 http://ec.europa.eu/enterprise/sectors/chemicals/reach/index_en.htm

7 FACET: Flavours, Additives and food Contact material Exposure Task (<http://www.ucd.ie/facet/aboutfacet/>)

8 http://ec.europa.eu/food/food/biotechnology/novelfood/index_en.htm

CIAA Incident Management System

The CIAA Incident Management System assists the food industry to take prompt action in response to emerging/potential food safety incidents. The efficiency of the system has been demonstrated in its responses to important RASFFs, such as the discovery of melamine in products from China.

Novel Foods

Background

On 14 January 2008, the European Commission issued its proposal for the revision of the Novel Foods Regulation⁸. CIAA welcomed this publication as the revised text incorporated several of the requests raised by the food and drink industry. In particular, it introduced a centralised authorisation procedure and includes data protection provisions for newly developed innovative food. The initial applicant would be authorised to market the food for five years before it becomes a generic foodstuff that can be produced and marketed by others. The proposal also makes provisions for food which has never been consumed in Europe, but which has a history of safe use elsewhere. For such foodstuffs, the authorisation procedure has been simplified.



Achievements and Challenges

The first reading in the European Parliament was completed in 2009. Member States came to a political agreement under the Czech presidency and the Common Position was adopted in March 2010.

The Parliament introduced important amendments on data protection as well as a definition of nanomaterials. However, several challenges remain, namely:

- Providing appropriate transitional mechanisms for pending novel food applications;
- Ensuring an operable relationship between the Novel Foods and Health Claims Regulation;
- Introducing a simplified (fast-track) procedure for foods and ingredients with a history of safe use, such as food and ingredients that have already been authorised, but which are intended for use in a novel food; and
- Vitamins and minerals, which are already covered under specific legislation, should not be additionally regulated in the novel food legislation.

CIAA also has serious concerns with regards the provisions on a safeguard clause in the Council Common Position, which would allow Member States to reject approved novel foods on the basis of a national classification as a medicine. This goes against the principle of harmonisation at EU level, seriously undermines the smooth functioning of the internal market and introduces a high level of uncertainty for business.

Food Contact Materials

Background

In 2008, CIAA closely followed the various proposals under development as well as the activities of the European Commission Working Group on Food Contact Materials, to ensure that the views of the EU food and drink industry were taken into consideration.

Achievements and Challenges

CIAA continued to be involved in several 'joint industry groups' with the packaging supply chain, including groups dealing with metal closures, packaging inks, exposure and the transfer of compositional information in the plastics supply chain.

- **Plastics:** CIAA is contributing to the preparation of a Commission Regulation relating to plastics materials and articles intended to come into contact with foodstuffs (so called Recast of Plastics Directives). CIAA will continue its work in order to ensure that the food industry's concerns are properly addressed.
- **Active and Intelligent Materials:** CIAA has contributed to the European Commission's Regulation on active and intelligent materials and articles intended to come into contact with food, which entered into force in early June. CIAA was pleased to note that all of its concerns were taken on board.
- **Packaging Inks:** The 'Packaging Inks Joint Industry Task Force' was created under the initiative of CIAA and comprises representatives from printing ink manufacturers, packaging manufacturers and food and drink industry representatives. The Task Force, which has become a reference group, has provided key expertise on assessing and controlling the risk of contamination of food contact surfaces by packaging inks.
- **Transfer of Information:** In close cooperation with relevant stakeholders from the packaging supply chain, CIAA will continue to work to ensure a proper and harmonised information flow throughout the supply chain with regard to food contact materials and articles.



Contaminants

Background

The European Commission's Regulation 1881/2006 sets maximum levels for certain contaminants in foodstuffs. To supplement existing maximum levels for the Fusarium Toxins deoxynivalenol, zearalenone and fumonisins, the Commission agreed to take the possible introduction of limits for T-2 and HT-2 toxins into future consideration. These toxins have since formed the focus of the annual DG SANCO Fusarium Toxins Forum in February 2009.

Achievements

In February 2009, CIAA delivered presentations to the Fusarium Toxins Forum, detailing the concerns of the food chain as a whole with regard to the possible introduction of limits for T-2 and HT-2.

Challenges

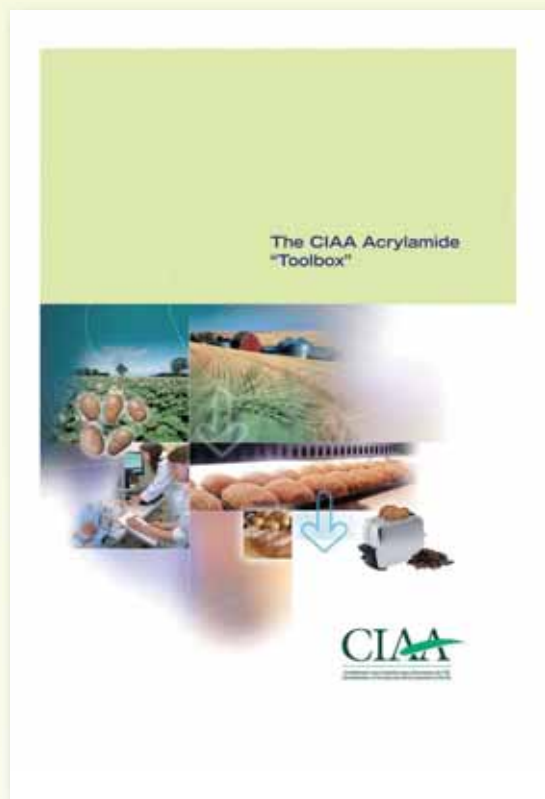
CIAA will continue to steadfastly support Commission efforts to maintain a dialogue with stakeholders on maximum levels for Fusarium Toxins as a whole, and in doing so, will encourage the European Commission and Member States to ensure that existing and future levels are also realistically achievable, in other words which:

- Ensure the protection of consumer health;
- Are set in accordance with a risk-benefit (e.g. safety, nutrition, quality) approach;
- Take agricultural feasibility into account (seasonal, geographic and crop variations, etc); and
- Acknowledge the interrelationship between toxins.

Process contaminants: Acrylamide

Background

Acrylamide⁹ was first discovered in food in early 2002. Since this discovery, many civil society groups such as industry, academia and



government research laboratories have developed a deep level of understanding of acrylamide formation in many types of food. This provides the basis for interventions to reduce the levels of acrylamide in products before their placement on the market.

Achievements

CIAA created the Acrylamide CIAA 'Toolbox'¹⁰ which reflects the results of more than seven years of industry cooperation to understand acrylamide formation and potential intervention steps. Its aim is to provide brief descriptions of the intervention steps evaluated and, in many cases, already implemented by food manufacturers and other partners in the food chain. The 12th revision was published in 2009. For the first time, the Grocery Manufacturing Association of America (GMA)¹¹ has also worked

⁹ Acrylamide is a chemical that is used to make materials used in the treatment of drinking-water and waste water.

¹⁰ http://www.ciaa.eu/asp/documents/11.asp?doc_id=822

¹¹ Grocery Manufacturing Association of America (GMA) <http://www.gmabrands.com>

closely with CIAA to introduce information generated in the United States.

In a continued effort to make these tools easier for SMEs¹² throughout Europe to implement, CIAA and DG SANCO, in collaboration with national authorities, developed Acrylamide Pamphlets for five key sectors: Biscuits, Crackers and Crispbreads, Bread Products, Breakfast Cereals and Fried Potato Products such as potato crisps and French fries. The first revision of these pamphlets, to take into consideration the latest mitigation tools, was published in 2009. The pamphlets are now available in 20 languages.

Challenges

- Promote the use of the tools to try to mitigate acrylamide in food;
- As appropriate, check the results of mitigation efforts; and
- Maintain efforts to regularly update the CIAA Acrylamide Toolbox and to encourage its adoption at a global level.

Low-Level Presence of Non-Authorised GMOs

Background

In light of the widening gap between EU GMO (genetically modified organism) authorisations and increased authorisations in third countries from which the EU imports, it is increasingly difficult to segregate commodities, despite the rigid segregation methods in place. The EU regulatory system does not permit the presence of any GMOs in food that have not been approved in the EU, irrespective of an approval according to Codex Plant Guidelines in a third country. In 2007, the European Commission's DG for Agriculture and Rural Development undertook a study on unapproved GMOs in EU feed imports and on livestock production that indicated that the impact of the current zero-tolerance policy for EU-unapproved GMOs would be as devastating for the food sector as for the feed sector.

Achievements

In 2008, food chain partners commissioned a study on the impact of the European zero-tolerance policy for EU-unapproved GMOs on the food industry. CIAA then commissioned a concrete Impact Assessment Study based on Rapid Alerts¹³ which were introduced to the European system mid-2009. CIAA also contributed to a study, commissioned by partners of the first processing industry. The studies were discussed with all relevant Directorates-General and Commissioners.

Codex Alimentarius¹⁴ approved the Annex on Food Safety Assessment in Situations of Low-Level Presence of Recombinant-DNA Plant Material in Food in 2008.

The adoption of guidance related to food safety assessments of low-level presence is essential to facilitate international trade while regulating incidental or trace amounts of biotechnology events in food and feed products. The new guidance recognises that low-level presence is a natural part of plant biology, seed production and the distribution of commodity crops, and it can be managed in ways that ensures food safety and minimizes trade disruptions.

Challenges

In spite of the efforts of all food and feed chain partners, and global recognition that this is an issue that also needs to be addressed in Europe, a technical solution for both feed and food has not yet been found.

New Rapid Alerts can be anticipated, having a major impact on the food industry, and the availability of products on the market, without introducing any food safety concerns.

CIAA will continue its efforts, which began in 2007, and will focus on key issues including disruptions to EU trade and the need for an adequate supply of raw materials and, together with authorities and other key stakeholders, will seek technical solutions that will alleviate the situation the EU food and drink industry is currently facing.

¹² Small and Medium Sized Enterprises.

¹³ http://ec.europa.eu/food/food/rapidalert/index_en.htm

¹⁴ <http://www.codexalimentarius.net>

Nanotechnology

CIAA supports the use of nanotechnology¹⁵ which has widespread industrial applications, including uses in food products, processing and packaging. The use of nanotechnologies in the food industry is at an early stage.

As an innovative and progressive industry, the food sector is interested in science-based research and developments, including the application of nanotechnologies. CIAA members, together with other stakeholders and academia, are therefore actively supporting and carrying out research in this area.

There is a need to distinguish between the natural occurrence of nanoparticles (such as in protein, fat or sugar molecules), their presence through conventional processing techniques (such as milling, homogenising and emulsifying) and where particle size has been deliberately engineered to behave differently to its conventional counterpart.

CIAA is closely following and is actively involved in national, EU and international activities in nanotechnologies and its implications for the



food industry. For example, CIAA monitors the work being carried out by both the European Commission's independent Scientific Committee on Emerging and Newly Identified Health Risks (SCENIHR) and the European Food Safety Authority (EFSA) on safety evaluations and closing knowledge gaps. Since 2008, CIAA has organised two stakeholder dialogue meetings. CIAA members request information from their suppliers on the use of engineered nanomaterials.

International Standards (Codex Alimentarius)

CIAA submitted a number of positions to Codex Alimentarius throughout the course of 2009 on, for example:

- Codex Draft Guidelines for Risk Analysis of Foodborne Antimicrobial Resistance;
- Draft Guidelines on the Application of General Principles of Food Hygiene to the Control of Viruses in Food;
- A Draft Revision of the Guidelines on Nutrition Labelling concerning the List of Nutrients which are always Declared on a Voluntary or Mandatory Basis;
- A Draft Discussion Paper on Criteria or Principles for Legibility and Readability of Nutrition Labelling; a Discussion Paper on Issues related to Mandatory Nutrition Labelling;
- Methods of Analysis for Dietary Fibre; a Discussion Paper on Aflatoxin in Brazil Nuts; the Priority List of Food Additives Proposed for Evaluation by the Joint Expert Committee on Food Additives (JECFA); and
- On a Draft Code of Practice for the Reduction of Acrylamide in Food.

¹⁵ Nanotechnology, or 'nanotech', is the study of the controlling of matter on an atomic and molecular scale.

EUROPEAN TECHNOLOGY PLATFORM *FOOD FOR LIFE*

Background

Following the principles of the Lisbon Strategy, the European Technology Platform (ETP) *Food for Life*¹ was created in 2005, under the auspices of the CIAA. The main goals of the ETP are to strengthen the European innovation process, improve knowledge transfer and stimulate European competitiveness across the food chain.



Achievements

Following the publication in 2005 of the ETP's 'Vision for 2020 and beyond', and the 'Strategic Research Agenda (SRA) 2007-2020' in 2007, an 'Implementation Action Plan' (IAP) was then published in September 2007, and officially launched in October 2008.

The IAP explains how the research priorities that were identified in the SRA of the ETP *Food for Life* can be implemented most effectively. The IAP focuses on three main research areas:

- Improving health, well-being and longevity;
- Building consumer trust in the food chain; and
- Supporting sustainable and ethical production.

The ETP's achievements have already had a major impact on:

- Bringing together a wide cross-section of the European research community and other stakeholders to recognise the most important challenges that the sector faces in the next decade or so;
- Establishing an active network of 35² National Technology Platforms *Food for Life*;



- Establishing a Member State Mirror Group, composed of representatives from Ministries and national funding bodies;
- Influencing the priorities for research within recent calls for proposals under the Food, Agriculture and Fisheries, and Biotechnology theme of the Cooperation pillar of Framework Programme 7 (FP7). CIAA expects that the SRA priorities will be reflected in future calls for proposals in a balanced and coherent way, in line with other topics from the FP7 Theme 2 'Agriculture, Food and Biotechnology'; and
- Establishing task forces and working groups, such as a task force on public-private partnership or the SMEs task force, which aims at catalysing the involvement of SMEs in the work of the ETP.

¹ <http://etp.ciaa.eu>

² Albania, Austria, Belgium (Flanders' Food platform), Belgium (Wagralim platform), Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Iceland, Israel, Italy, Latvia, Lithuania, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland (Swiss Food Research), The Netherlands, Turkey, Ukraine, United Kingdom.



Challenges

CIAA believes in the importance of developing a coherent research strategy for the agri-food sector based upon the common vision of diverse stakeholders, including the food and drink industry. This strategy should take into account societal challenges, the level of economic impact, and the need for major, sustained investment in multi-disciplinary, trans-national knowledge. Complemented by national and industry funds, increased funds will be dedicated to food research via future calls for proposals under the EU's Seventh Research Framework Programme (FP7), Theme 2: 'Agriculture, Food and Biotechnology'.



Allergens in Food

In November 2009, CIAA launched a project for large companies and SMEs to develop European industry-wide voluntary guidance on allergen risk management and labelling. This guidance will be based on both existing guidance/good practice on labelling, sanitation, supply and control. It will acknowledge other bodies of work in this area, such as Europrevall³, the allergen management project under the EU's Sixth Framework Research Programme⁴ and its use outside the CIAA will be encouraged in future. Key stakeholders, including patient groups (e.g. allergy sufferers), will be consulted at a later stage in the drafting process to ensure that all advice is appropriately incorporated.

CIAA involvement in European Research Projects:

- BECOTEPS (Bio-Economy Technology Platforms join forces to address synergies and gaps between their Strategic Research Agendas <http://www.becoteps.org/>)
- TRUEFOOD (Traditional United Europe Food) <http://www.truefood.eu/>
- FACET (Flavours, additives and food contact material exposure task) <http://www.ucd.ie/facet/aboutfacet/>

³ <http://www.europrevall.org/>

⁴ ftp://ftp.cordis.europa.eu/pub/food/docs/biotech_europrevall_v2.pdf

ENVIRONMENTAL SUSTAINABILITY

European Food Sustainable Consumption and Production (SCP) Round Table

Background

European consumers increasingly want to be sure that the food they buy and consume is safe, nutritious and affordable, and that it also meets the highest levels of environmental sustainability, respecting the carrying capacity of the Earth's eco-systems in the long-term. The EU food and drink industry aims to deliver environmentally sustainable food and drink products to its consumers.

Voluntary environmental assessment and communication along the food chain can make an effective contribution to both sustainable production and sustainable consumption by:

- Providing supply chain partners with credible environmental criteria for business-to-business purchasing decisions and for marketing purposes;
- Enabling producers to identify priority areas for improved supply chain efficiency, resource savings and cost reduction; and
- Empowering consumers to make informed choices.

In order to fulfil these functions, environmental information must be based on scientifically robust and consistent assessment methodologies across the EU. In addition, it must be communicated to consumers in a clear and comprehensible way.

However, a proliferation of different approaches is currently emerging across Europe on how to conduct environmental assessments of food and drink products and on how to communicate environmental information. This situation presents a series of risks for consumers, businesses and the environment alike, which can lead to issues such as:



- Undermined environmental effectiveness;
- Consumer confusion due to incoherent or even contradictory messages;
- Lack of consumer trust in the entire concept of sustainability and accusations of 'greenwashing';
- Obstacles to the functioning of the Internal Market and international trade; and
- Increased complexities and costs along the supply chain.

With a view to countering these challenges and ensuring that reliable and coherent environmental information can make a real contribution to sustainable production and consumption in the European chain, CIAA, together with its food chain partners and the European Commission, initiated the European Food Sustainable Consumption and Production (SCP) Round Table¹ in 2009.

Achievements

The Round Table (RT) was officially launched on 6 May 2009 in Brussels. By the end of 2009, it counted on the support of twenty-three formal European member organisations from across the food chain as well as of the European Commission as co-chair, the UN Environment Programme (UNEP) and the European Environment Agency (EEA). Several Member States are also providing expertise to the RT.

¹ <http://www.food-scp.eu/>



Welcome to the European Food SCP Roundtable

Welcome

The European Food Sustainable Consumption and Production Round Table is an initiative, co-chaired by the European Commission and food chain partners, which aims to establish the food chain as a major contributor towards sustainable consumption and production. [Interim Report](#)

Its activities are centred on three major objectives:

1. Identify scientifically reliable and uniform environmental assessment methodologies for food and drink products, considering their impact across the entire product life-cycle;
2. Identify suitable communication tools to consumers and other stakeholders and develop guidance on their use, looking at all channels and means of communication; and
3. Promote and report on continuous environmental improvement along the entire food supply chain and engage in an open dialogue with its stakeholders.

During the first six months of its operations, the RT has established a comprehensive work schedule, structured around a Steering Committee and four Working Groups, all of which are co-chaired by the Commission and the food chain constituencies. It has also begun developing principles for the voluntary environmental assessment of food products and communication of environmental information.

A key feature of the RT is the involvement of all the food chain operators on an equal footing. Member organisations must belong to one of the following constituencies: suppliers to agriculture, farmers and agri-cooperatives; agricultural trade; food and drink industries; packaging value chain; transport and logistics; retailers; end-of-life (packaging recovery organisations, waste industry); consumer NGOs or environmental/nature conservation NGOs.

The Commission participates in the RT as a co-chairing organisation. Various Commission departments (DG Environment, Joint Research Centre, DG Health and Consumers and DG Enterprise) co-chair the Round Table Working Groups and the Steering Committee together

with representatives of the food chain. Other Commission services (including DG Agriculture and Rural Development, DG Transport and Energy and DG Research) also participate in the RT.

Challenges

The RT has set itself an ambitious list of targets and timelines for 2010 and 2011:

1. Establishment of a framework for the environmental assessment of food and drink products and for voluntary environmental communication to consumers and other stakeholders consisting of:
 - a. Guiding principles on the voluntary environmental assessment of food and drink products and environmental communication along the food chain (by mid-2010); and
 - b. A framework assessment methodology for food and drink products (Interim Report by end 2010, methodology by end 2011).
2. Evaluation of existing emerging means and tools of environmental communication to consumers and other stakeholders and provision of guidance on their use (end 2010).
3. An Action Plan for continuous environmental improvement measures by individual members of the whole food chain, including sector organisations (2010 and 2011):
 - a. Prioritisation of major environmental challenges along the food chain;
 - b. Promotion of further voluntary sustainability measures, on a continuous basis, at all levels (dissemination of best environmental practice and resource-efficient technologies, environmental management systems, support for SMEs, R&D, environmental assessment and communication, etc); and
 - c. Communication on progress.



Climate Change

Background

Ahead of the UNFCCC COP-15² Conference in Copenhagen³ on 7-18 December 2009, the European food and drink industry, represented by CIAA, called upon EU and global governments to undertake all efforts to enable a legally binding, environmentally effective and globally equitable international agreement on climate change, covering the period 2013-2050. An ambitious agreement is needed to adequately address the dual global challenge of food security and climate change and to safeguard European competitiveness. EU industries are part of the solution to this challenge and require a level playing field at international level. Developing countries must be granted adequate long-term support for both mitigation and adaptation.

In parallel to the run-up to Copenhagen, the EU proceeded with the implementation of the revised EU Emissions Trading Scheme (ETS) Directive⁴, notably by setting up a list of EU manufacturing sectors subject to significant carbon leakage risks and by preparing the development of CO₂ benchmarks for the EU ETS manufacturing sector.

Achievements

Much to the European food and drink industry's regret, the COP-15 Conference in Copenhagen failed to achieve a legally binding international agreement which would make other industrialised countries and major emerging economies subject to equitable greenhouse gas (GHG) reduction targets. CIAA supports the subsequent EU position not to raise its unilateral EU GHG reduction target from 20% to 30% by 2020 until other major emitters have made comparable, legally binding commitments.

At the EU ETS level, a final list of 164 industrial sectors that qualify for free carbon allowances under the EU ETS in 2013-14 was published in the Official Journal⁵ in January 2010, following approval by the European Parliament and Member States. CIAA welcomed this decision which helps these sectors preserve their international competitiveness in the absence of an international agreement. CIAA also notes that the identified sectors, including a number of energy-intensive food industry sub-sectors, remain subject to ambitious EU ETS CO₂ reduction targets based on stringent efficiency benchmarks.

Challenges

Despite the international setback in Copenhagen, the achievement of a legally binding international agreement must remain the EU's overriding policy priority in the field of climate change. Only an international agreement can effectively address the global environmental challenge while ensuring a level-playing field for sectors subject to global competition.

Within the EU ETS context, CIAA and its members look forward to engaging closely with the European Commission and Member States in order to establish CO₂ benchmarks for the transitional allocation of free EU ETS allowances to the food industries in the period 2013-2027. Given the immense diversity of food and drink products, it is not feasible to establish product-related benchmarks for each of them and combustion-related benchmarks will have to be applied in a majority of cases to reward the most efficient installations.

² United Nations Framework Convention on Climate Change Conference of the Parties

³ <http://en.cop15.dk>

⁴ http://ec.europa.eu/environment/climat/emission/index_en.htm

⁵ <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2010:001:0010:0018:EN:PDF>

INFORMATION AND PUBLICATIONS



Electronic media

CIAA

<http://www.ciaa.eu>

GDA's and Nutrition Labelling

<http://gda.ciaa.eu>

European Technology Platform *Food for Life*

<http://etp.ciaa.eu>

Nanotechnology

<http://nanotechnology.ciaa.eu/>

Managing Environmental Sustainability

<http://envi.ciaa.eu>

Balanced Diets, Healthy Lifestyles

<http://www.active-lifestyle.eu>

Publications

Data and Trends 2009

CIAA Memoranda of Priorities for the Czech and Swedish EU Presidencies

The Competitiveness of the EU Food and Drink Industry - Facts and Figures 2009

CIAA Acrylamide 'Toolbox Twelfth Edition

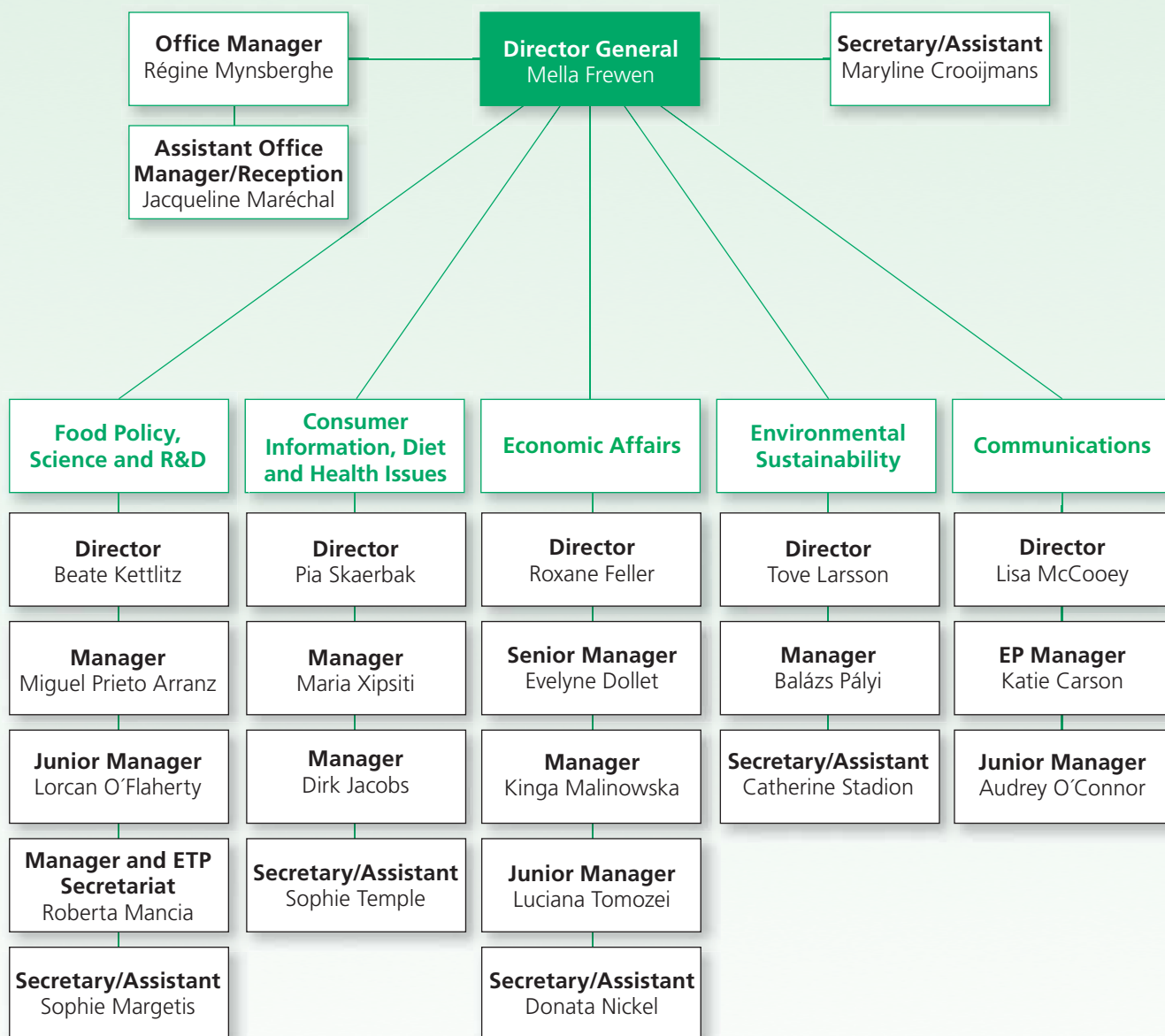
GDA's: Guideline Daily Amounts The Facts. Your Choice.

CIAA Policy Recommendations - Input into the High Level Group on the Competitiveness of the Agri-food Industry

All publications are available for download from the CIAA website:

<http://www.ciaa.eu/asp/documents/brochures.asp>

CIAA SECRETARIAT



As of May 2010







CIAA

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