

2015 / 16

Annual Report & Review



Our mission

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

The industry we represent

The good news first: snacking is a growing trend!

Globally 2013-2014

€352 billion
spent on snack foods

2% increase
year-over-year



Between 2013 and 2014 consumers globally spent annually €352 billion on snack foods (which goes beyond savoury snacks only); a year-over-year increase of 2% (source: Nielsen). With the ongoing erosion of traditional meal patterns due to nomadic and busy lifestyles and changes in family structure snacking or grazing offers a convenient and enjoyable way to meet daily nutritional needs. Our industry sits at the juncture for providing consumers with delicious and nutritious treats for different occasions: aperitifs, sharing, meal accompaniments, eating on-the-go, etc.

Regardless the fact that our products account only for a small part of overall dietary intake, the savoury snacks sector recognises its role in promoting healthy diets and active lifestyles. We believe that with the support of authorities and through public-private partnerships, we will be able to develop efficient solutions to achieve a common goal: a healthy, actively living and well-informed

society. Our sector has already and will continue to invest into this objective – be it by developing new R&D techniques, implementing new consumer information approaches or looking for a sensible debate with decision makers and NGOs.

Representing savoury snack manufacturers, their suppliers and national sector associations ESA bundles the knowledge and intelligence of our industry and spearheads into the debate about food safety as well as health and nutrition. With the strong support of our members we provide technical expertise and input into the policy making process and promote the achievements of the savoury snacks sector at European level. By correcting misperceptions or unfair demonisations of our products we are able to both create a positive mind-set about our industry and establish and maintain trustful and constructive relationships with key stakeholders.

Year in review

President's review

Having been with ESA for over 14 years and now having the privilege and pleasure to serve as ESA's president for the third time, I am pleased to inform you that with the support of our members and the tireless work of the secretariat, ESA has been able to build the sector's reputation within the Brussels arena such that we are considered to be a responsible and pro-active industry.

The secretariat has proven itself as an efficient resource and I am sure that, with the support of the membership, they will be able to overcome the obstacles ahead

Board changes

Göran Wadsten (Rosenqvists Food Technologies AB) was appointed to the ESA board in 2015 as associate director for the equipment suppliers' side. I am pleased to welcome him and look forward to his commitment and contribution to the board's work.

Fritz Mandl (McCormick Flavour Group) and Ian Benson (NDC Technologies) left the board in 2015 after having served ESA loyally several years. We thank them for their valuable input and dedicated support.

It seems that as each year passes the political pressures on the food and drink industry are increasing. There is a growing appetite for more restrictions; especially at EU member state level. For our sector which is often perceived as one of the main culprits of bulging waistlines, the pressures have been particularly challenging. Despite this, we have so far been able to convince the European Commission that self-regulation rather than legislation is the most appropriate way forward - either by joining the EU Pledge on food advertising to children, by ESA's active participation in the EU Platform for Action on Diet, Health and Physical Activity or by ESA's pivotal role in demonstrating the sector's credible and meaningful approach on process contaminants. All of this has given us the opportunity to highlight that we do take our responsibilities seriously and we want to make a valuable contribution to a healthy and active society.

During the last year the ESA board debated many topics including food improvement, process contaminants, labelling, official controls and food advertising to children. The seamless and effective interaction between ESA's working groups - through their chairpersons - and the rest of the board members has allowed us to work together to find solutions for the benefit of all ESA members. I would like to take this opportunity to thank all the board members for their commitment, valuable input and the support they have provided to me and the secretariat.

Looking ahead to 2016/17, I believe that the issues we face will be no less challenging than in previous years. However, the secretariat has proven itself as an efficient resource and I am sure that, with the support of the membership, they will be able to overcome the obstacles ahead. ESA's status within the Brussels community has been raised significantly over the past four years and its excellent relationship with legislators, NGOs, industry bodies and other opinion formers, without

doubt, will work to our advantage. We have a strong and effective secretariat and I thank them all for their hard work and commitment to furthering the objectives of the Association and defending our members' interests.



Mathias Adank
President
European Snacks Association



The year ahead Director General's insight

Another year has passed by very quickly and we look ahead what the future holds for our sector. It will offer a lot of exciting developments which will impact your business in one way or another.

Being at the forefront of food innovation our industry will harness this societal development by offering products for a quick energy boost in a portable and practical format



Trends in 2016 – Savoury snacks continue to adapt perfectly to changing consumer preferences and never fail to surprise

Recently we have heard a lot about high-protein insect snacks, the revolutionary oxymora of sweet-savoury snack flavours ('swavoury') and about ancient but rediscovered raw material like quinoa or kale. So what will 2016 bring for the European savoury snacks industry?

In general we will observe the continued trend of the so-called snackification of everything. An increasing number of consumers divide their day into more than the traditional three eating occasions; hence there is so much more opportunity for the sector to present them with delectable and nutritious products. Being at the forefront of food innovation our industry will harness this societal development by offering products for a quick energy boost in a portable and practical format.

With eating occasions in a state of flux, consumers are getting more demanding in their expectations towards snacking which is increasingly related to an occasion or an event. In the morning they want to have a wake-up protein kick that fuels them through their way to work and the first working hours, later during the day when they might not have been able to enjoy a traditional lunch they want the choice of exciting and daring intermediate delightful options to nibble on, after work they expect to be able to choose from a universe of snacking formats which fit seamlessly into their evening programme, be it after physical exercise, a night out with friends or cocooning at home.

The ESA secretariat, with the help of our members, will continue to fight against any accidental or purpose-driven stigmatisation of our members' products, be it in discussions around food safety, advertising and marketing, discriminatory food taxes, etc.

How will our industry cope with these increasingly varied demands and what can we offer in the 2016? For snacks, 'low fat' has historically and often been associated with 'low taste', and this is one of the reasons why better-for-you ('reduced in') snacks are likely to grow in the future, and our industry will look into ways to build on the achievements made in terms of food reformulation to further improve the nutritional composition of our products. However, we have seen that the messaging around it will need to be discrete rather than overt, more clever than straight-in-your-face.

The future for savoury snacks is likely to revolve around fewer ingredients, and more natural flavours and colours, with consumers seemingly mistrusting long ingredients lists. With an increasing proportion of the older population remaining avid snackers, our members are and will be adapting their snacks more consciously to older age groups, putting portion control, stealth reduction and natural at the forefront of their innovation strategies.

So far, stealth reduction, or the reformulation of products by incorporating healthier ingredients which naturally have lower salt or fat content, appears to be faring well. Nuts, meat snacks and popcorn are benefiting most from the trend due to them being perceived as naturally healthier, naturally low in fat or naturally high in protein. Alternative production techniques, such as popping or baking are increasingly being explored by our members to tap into growing consumer demand for such products. With the increasing concern over obesity, portion control will gain traction, which will subsequently drive demand for smaller, more convenient packaging.

Finally another trend that has started in the recent past and for which we will certainly see a steep increase will be the personalisation of snacks, which provide an individual and unique sensory experience – be it event-related like for the upcoming European soccer championship or flavour-related where customers can propose 'their' flavour to be produced for the market and gain a share of the profit.

Regulatory pipeline – Regardless of last year's success in advocacy and communication matters, our sector is still in the spotlight of regulatory threats

In 2015 we have seen and experienced a higher number of member states' initiatives to tighten advertising of foods (especially HFSS foods) in general, and towards children specifically. ESA is the only trade association that is a member of the EU Pledge. A self-regulatory initiative that covers over 80% of branded food ads and that has led to a significant impact on children's exposure to advertising over recent years.

By the end of 2016 the EU Pledge will further strengthen its commitments by addressing creative executions in all marketing communications (incl. child-directed marketing communications for products that do not meet nutrition criteria that use licensed characters, celebrities & movie tie-ins) and by expanding the scope of covered media: TV, radio, print, cinema, online, DVD/CD-ROM, outdoor, direct marketing, product placement, interactive games, mobile and SMS marketing.

We understand that all of this takes place while more and more member states push for the national implementation of the WHO Europe nutrition profile model that would make it very challenging for our members to continue advertising to children older than 12 years. On top of that we expect the European Commission to issue before summer its review of the Audio-Visual Media Services Directive (AVMSD) that governs EU-wide coordination of national legislation on all audio-visual media, both traditional TV broadcasts and on-demand services. We have fed into the consultation process of the AVMSD review and can only hope that the outcomes will further strengthen the self-regulatory approach that has shown meaningful positive impact in the last years.

At the end of 2015 our products were erroneously included into the member states' discussion about added sugars in food products, and we will see many more of these misconceptions popping up in the future. Be it from supra-national side from WHO (Europe) or the OECD or from the member states' side where decision makers simply do not understand that our category only contributes in a very minor amount towards the intake of nutrients of public health interest. The ESA secretariat, with the help of our members, will continue to fight against any accidental or purpose-driven stigmatisation of our members' products, be it in discussions around food safety, advertising and marketing, discriminatory food taxes, etc.

The year has only just started but we are already well equipped to take on the challenges. 2016, bring it on!



Sebastian Emig
Director General
European Snacks Association

Year in review

Potato & cereal snacks

The EC Regulatory Working Group (ECR) covers a wide range of topics, and focuses on working with regulators to promote industry-wide self-regulation and to ensure that, where legislation is proposed, it remains proportionate. Under the chairmanship of Katie Carson (Kellogg Company), the group has ensured another fruitful year safeguarding members' interests in a number of key areas.



The continued efforts made by ESA in communicating the impracticability of the MCOOL to key decision-makers finally paid off

New food labelling legislation now in force

Since the entry into force of the Food Information to Consumers (FIC) Regulation (EC) No 1169/2011 on 13 December 2014, the group has kept a close eye on the interpretation of the new rules across member states and ESA continues to monitor and report on developments relating to the requirements.

The change of European Commission has brought about new guiding principles on policy-making: the 'Better Regulation' approach. This aims to avoid unnecessary regulatory burdens and ensure that policies and regulations are appropriate and proportionate. In practice, this approach has led to a closer internal scrutiny of possible legislative follow-ups and has resulted in delays to the publication of several reports that were originally due by December 2014.

Country of origin labelling

The Commission's long awaited report on country of origin labelling (COOL) was published on 20 May 2015, some six months after the original deadline. The report covered the mandatory indication of the country of origin for unprocessed foods (MCOOL), single ingredient products and ingredients that represent more than 50% of a food.

The continued efforts made by ESA in communicating the impracticability of the

MCOOL to key decision-makers finally paid off. The report concluding that voluntary origin labelling is the most appropriate option, dispelling concerns over what would have been an unreasonable and disproportionate burden for companies. We continue to actively participate in discussions on the setting of rules for companies who wish to voluntarily declare COOL.

Trans fatty acids

The other adjourned report stemming from the FIC Regulation related to trans fatty acids (TFA) in food and in the overall diet of Europeans. This was finally published on 11 December 2015 – a full year after it was originally expected.

The report concluded that a legal limit for industrial TFA content would be the most effective measure in terms of public health, consumer protection and compatibility with the internal market. However, the paper also stated that the way in which this could be technically put into practice would require further investigation.

Although most companies would have preferred a self-regulatory approach, the sector has welcomed the ruling out of TFA labelling and will continue to closely follow future developments in this area.



Evaluation of Regulation (EC) No 1924/2006 on nutrition and health claims

In October the commission published its roadmap for the evaluation of Regulation (EC) No 1924/2006 on nutrition and health claims made on food and the group has debated the best strategy to feed into the debate.

The purpose of this evaluation is to assess whether nutrient profiles (which were supposed to be adopted in 2009), are still 'fit for purpose' - and whether the Regulation has achieved its objectives with respect to nutrient profiles and claims on botanicals.

Although this evaluation is not sector-specific, the application of nutrition and health claims and the different interpretation of the rules across member states remains a high-interest topic for the group, and will remain a central element of its work plan for 2016/2017.

New Regulation on novel foods

The final adoption of Regulation (EU) 2015/2283 on novel foods on 11 December 2015, repealing previous Regulations (EC) No 258/97 and 1852/2001, put an end to several years of discussions and negotiations with another satisfactory outcome for the sector.

The new Regulation will simplify and shorten the authorisation procedure as of December 2017, especially for traditional food with a proven history of safe use in non-EU countries, which will make the introduction of new snack ingredients easier, and will help stimulate innovation within the sector. The new legislation also lays down the definition of engineered nanomaterials, amending the FIC Regulation.

Although most companies would have preferred a self-regulatory approach, the sector has welcomed the ruling out of TFA labelling

Acrylamide

The publication of the European Food Safety Authority's (EFSA) Scientific Opinion on the safety of acrylamide in food in June 2015 has increased pressure on the food industry to demonstrate that it is in control of the issue, and is successfully reducing levels in products.

Working closely with colleagues in FoodDrinkEurope and other sector associations, ESA has spent considerable time and effort developing two new codes of practice (these are based upon the results of an industry survey which was issued in the second half of 2014). The codes cover sliced potato crisps and potato-dough based crisps, snacks and crackers, and set out minimum best practice expectations for any company operating within the sector.

During the course of the year member states have held a number of formal discussions on the setting of regulatory measures, including the possibility to set maximum levels. However, recognising the technical challenges this would pose, discussions have now moved towards proposals for the mandatory implementation of the codes of practice and a continuation of the existing 'indicative values' approach. The commission is expected to have final proposals in place by the end of 2016.

ESA continues to play a central and proactive role in promoting the code of practice approach, which offers the most practical and pragmatic approach for industry.

MCPD-esters

In the first half of 2016 EFSA will publish its Scientific Opinion on 2 and 3-monochloropropane-1, 2-diol (2- and 3-MCPD) fatty acid esters and glycidyl fatty acid esters in food.

It is anticipated that potato crisps and savoury snacks will be referenced within the Opinion due to the fat component within the products; however ESA has worked closely with colleagues in the Research Institute of the German Confectionery Association and has determined that there is no significant formation of these chemicals during production of crisps and snacks.

This evidence has been shared with EFSA, with member states' experts and has been published in a peer-reviewed journal.

The ECR group has prepared updated Q&As and reactive statements in advance of the EFSA publication. Once published, member states are expected to start formal discussions on legal measures to either prevent or minimise formation or exposure to these chemicals.

A further risk assessment will be carried out in November 2016 by the Joint FAO/WHO Expert Committee on Food Additives (JECFA) and this is expected to inform future international discussion within the Codex Alimentarius.

Year in review Communications

ESA is committed to a meaningful and constructive engagement with all key stakeholders. The main task of the ESA Communications Working Group (COMS) is to promote the understanding of savoury snacks and snack nuts in Europe, and shape the reputation of the industry as a responsible, trustworthy and committed partner in the public and political debate.

The European Commission's new mantra 'to be big on big things, small on small things' could have resulted in a relatively quiet year from a health and nutrition perspective, a domain which remains to a very large extent in the hands of the member states. However, it did not, and discussions have been rather lively allowing the COMS group to further promote the understanding of the savoury snacks sector amongst the key decision-makers in Brussels.

Product improvement is gaining momentum

Early on, Health Commissioner Andriukaitis made it very clear that food product improvement would be a priority in his strategy to fight against the burden of non-communicable diseases (NCDs). This call was later echoed by the Netherlands when they unveiled their intentions to develop an EU concerted action when accessing the presidency of the Council of the European Union in 2016.

The COMS group followed this issue closely and performed a thorough analysis of the previous EU initiatives on product

improvement to help develop a position for the sector and identify opportunities for snacks manufacturers. Even though sugar seemed to be – together with trans-fat – the most critical nutrient, the group considered all options as our product category unfortunately remains a sitting duck even when the facts contradict common assumptions.

This was illustrated again with the publication at the end of 2015 of a new annex to the EU framework on selected nutrients focusing on reducing added sugars in which savoury snacks are listed amongst food categories identified as major sources of added sugars in European diets. The ESA secretariat took the opportunity to draw to the attention of the European Commission and member states that the contribution of savoury snacks to added sugar intake in Europe is almost non-existent.

This is why understanding and collecting additional proof points on the low contribution of savoury snacks to energy, salt and fat intake in European diets has also been





The four commitments underpinning the EU Platform for Action on Diet, Physical Activity and Health were judged again this year as satisfactory by the independent evaluators

an important part of last year's work. It has confirmed that contrary to common beliefs our product category weighs very little, be it in absolute numbers or compared to other food products.

Spreading the message of the sector across the 'Brussels' bubble'

At the beginning of July 2015, ESA hosted its second annual 'share-a-snack' event in the crowded Place du Luxembourg in front of the European Parliament, taking the opportunity to engage with parliamentary employees and European Commission staff. Visitors were invited to test their knowledge of savoury snacks in a short online quiz which allowed us not only to share information about the products, but also debunk some common myths and raise awareness on some of our key issues in an interactive and entertaining way.

Another high point of 2015 was the organisation in Brussels of the 5th edition of the ESA Savoury Snacks Summit 'Who is really listening to consumers?' where high level speakers and attendees from European institutions, NGOs and industry exchanged views throughout an afternoon of debate. The event was a privileged platform for ESA to underline the challenges of product improvement and the crucial importance of one actor often overlooked in the debate, the consumer. After years of effort, Martin Seychell, Deputy Director General for Health, DG SANTE (European Commission), made no mistake when he praised ESA members for their achievements and their long term commitment to product improvement.

Promoting the achievements of self-regulation in the area of responsible advertising to children

With the entry into force of the new common nutrition criteria in 2015, ESA Pledge member companies again demonstrated their responsible approach to advertising to children showing a high compliance rate with the EU Pledge commitments. Results were indeed consistent with previous years illustrating the continuous improvement and the successful implementation of the new criteria.

The year has also been marked by the publication of a very restrictive nutrient

profile model underpinning marketing restrictions coming from the European office of the World Health Organization (WHO). The ESA secretariat and the COMS group have followed the reception of this model, while continuing to support the EU Pledge group in its efforts to promote the advantages of industry self-regulation. We continue to inform stakeholders about our achievements to date and the value of the Pledge to incentivize product reformulation.

A valuable contribution to the objectives of the EU Platform

Thanks to the hard work of our members, the four commitments underpinning the EU Platform for Action on Diet, Physical Activity and Health were judged again this year as satisfactory by the independent evaluators, thus underlining the valuable contribution the sector made to the objectives of the Platform.

The contribution of the savoury snacks sector was also illustrated by FoodDrinkEurope's new 'Balanced Diets and Healthy Lifestyles' brochure published and distributed to all institutional stakeholders on the occasion of the 10-year anniversary of the Platform. The document highlights an impressive series of initiatives put in place by the food and drink industry and includes examples from the sector such as the implementation of a portion size rationale as well as the strong commitment towards responsible marketing and advertising through the EU Pledge.

Looking forward...

Building on this year's experience, a key objective will be to further increase the visibility of the Association to ensure that the voice of the sector is heard by relevant institutional stakeholders and partners. The COMS group will again be instrumental in helping the secretariat deliver the necessary tools.

Product improvement will definitely remain high on the agenda with the Dutch presidency initiatives but also the concrete implementation of the annex on added sugars. An objective for ESA will be to prepare for potential discussions specifically focusing on our product category and to continue to be seen as responsible and credible partner.

Year in review

Snack nuts

The Nut Processors Working Group (NPWG) comprises members covering all key stages in the global supply chain. From origins to manufacturers to packers and shippers, this expert group is involved in a diverse range of issues covering official controls, food safety, health and nutrition and environment and sustainability.

The group will mainly focus its work in 2016/17 on the interpretation and implementation of the legislation on official controls

The NPWG, chaired by Julie Adams (Almond Board of California), provides a platform for members to address key issues affecting the snack nuts sector, covering the entire supply chain. Ranging from EU legislation, to Codex developments, and to ethical and sustainability concerns, members are kept abreast of and decide on appropriate actions to be followed in order to pursue the sector's goals.

Thanks to its excellent contacts with a wide range of other trade associations at international and national level, the group is able to leverage the combined strength of these alliances in order to advance the sector's interests with key stakeholders.

In order to facilitate the exchange of information and to share sector's concerns, ESA regularly invites guest speakers from European and national institutions to the NPWG meetings. Direct dialogue makes it possible to maintain a constructive and meaningful information flow with key decision-makers.

Official controls

The revision of the Regulation (EC) No 882/2004 on official controls for food and feed has remained one of the main centres of interest of the group in 2015/16 – with a positive outcome after more than two years of discussions.

When it was drafted in 2013, the new regulation proposal included as a crucial feature the mandatory requirement on member states to charge fees to food business operators (FBOs) for virtually all official controls. Discussions at European Council level were particularly complex, as member states had divergent views on the best way to finance these activities.

Since the beginning of the legislative procedure, ESA and the NPWG have actively advocated the sector's position – in particular its opposition to mandatory fees – and met with all key decision-makers involved in the discussions. The European Association of Chocolate, Biscuit and Confectionery Industries (CAOBISCO) also endorsed ESA's position on financing of official controls, as both sectors consider that food safety is in the public's interest and its control should remain the key responsibility of the competent national authorities.

In October 2015, the Luxembourg presidency of the Council finally accomplished what seemed to be an impossible mission by putting forward a compromise that maintains the status quo regarding the financing of official controls. The agreement reached thanks to this settlement has opened the door for an early second reading agreement with the European Parliament, which is expected for mid-2016. With this satisfactory outcome, the group will



A major supply disruption has been averted!

mainly focus its work in 2016/17 on the interpretation and implementation of the legislation on official controls. In this regard, the NPWG keeps an open dialogue with the European Commission - for instance, contributing to the update of the guidance document for competent authorities for the control of compliance with EU legislation on aflatoxins.

Extension of temporary MRLs of fosetyl in tree nuts

Since 2014, phosphonates have been included in the definition of fosetyl residues under Regulation (EU) 991/2014, despite the fact that they are used separately as fertilisers and biostimulants in third countries. This definition created an anomalous situation where the legal use of certain foliar applications led to exceeding the default maximum residue level (MRL) - originally set at the limit of detection of 2 mg/kg - for a pesticide that is not used in tree nuts.

In 2014, the European Commission agreed to set a temporary MRL (t-MRL) based on phosphonate residue levels in tree nuts from various origins, in order to avoid market disruptions. The European Food Safety Authority (EFSA) had previously concluded that the t-MRL of 75 mg/kg does not pose a consumer health risk.

However, the t-MRL was valid only until 31 December 2015, not allowing sufficient time

to carry out the necessary field trials and research in order to submit an application for the revision of the MRL. Therefore, in June 2015 ESA and the NPWG requested to the Commission an extension of the temporary MRLs that would enable the Almond Board of California and other American associations, together with the US Department of Agriculture, to finalise the dossier for the revision of the MRL.

Faced with the initial opposition of the commission, ESA coordinated advocacy efforts in several member states through the national snacks associations and joined forces with other associations, namely FRUCOM - the association of European traders; CAOBISCO and FoodDrinkEurope. In total, 17 of the 27 member states were approached.

This firm and sustained communication work was finally rewarded with the adoption in January 2016 of Regulation (EU) 2016/75 extending the t-MRL of fosetyl for almonds, cashew nuts, hazelnuts, macadamias, pistachios, and walnuts until 1 March 2019, at the same level of 75 mg/kg, and applicable retroactively since 1 January 2016.

The new deadline was requested with a view to cover not only the time needed to put together the dossier for a revised MRL, but also for potential delays in the assessment of the application. A major supply disruption has been averted!

Year in review

Events



SNACKEX Istanbul, June 2015

77% increase
in visitor growth

41% increase
on past high attendance

Many exhibitors were almost overwhelmed by the volume of serious enquiries arriving at their booths

SNACKEX gained significant further traction in 2015 and celebrated an overwhelming business success. Visitor numbers grew, exhibition space grew and we made good progress with reinforcing the position of SNACKEX as the sector's number 1 international business event.

Visitor growth in 2015 was a phenomenal 77% compared with 2013 and up 41% on our previously highest attended event in 2011.

Whilst there is no global or European measurement basis, this performance compares with the CEIR index (The Center for Exhibition Industry Research - US exhibition industry barometer *) of professional visitor attendance at trade shows which was up 1.6% in the first three quarters of 2015. By any measure, an increase of 77% in visitors is an overwhelming success.

An ability to grow the attendances at exhibitions is a key factor in their ultimate success. Knowledge of our customers' requirements, up-to-date databases, must-attend conferences and a focus on customer service all contribute to this goal. But ultimately it was the choice of Istanbul which drove the success of SNACKEX in 2015 to such new heights. Istanbul is supremely easy to access from around the world but is especially convenient for the business-developing nations within the Middle East and the Indian sub-continent which drove our visitor growth in 2015.

2015's record-breaking SNACKEX was packed with 120 exhibiting companies, 31 of which were displaying their wares at SNACKEX for the first time. They were met with over 2,600 participants from 83 different countries and five continents. Many exhibitors were almost overwhelmed by the volume of serious enquiries arriving at their booths. There was business to be done, but also fun to be had through networking with colleagues, business rivals and new contacts.

Attendees come to SNACKEX for many reasons but there is no doubt that the unique combination of a vibrant show floor full of new ideas, social functions organised to facilitate networking and a provocative and thought provoking conference programme delighted many.

ESA would like to thank all our attendees, exhibitors and speakers for making SNACKEX such a great success, with special thanks to our valued sponsors.

As we go to press, forward exhibitor bookings for SNACKEX taking place in Vienna, 21-22 June 2017, are strong across the board and we anticipate another successful event.

* The CEIR Index is an objective measure of the annual performance of the US exhibition industry which measures year-over-year changes in key metrics to determine overall performance



European Savoury Snacks Summit Brussels, October 2015

The 5th edition of the ESA Savoury Snacks Summit organised in Brussels gathered high level representatives from the European institutions as well as academics, NGOs and industry participants for a fruitful afternoon of debate around the thought-provoking question ‘Who is really listening to consumers?’

Martin Seychell, Deputy Director General for Health, DG SANTE (European Commission), notably delivered an inspiring keynote speech which acknowledged the sector’s many achievements on product improvement, and praised ESA as being the only EU trade association which is currently signed up to the EU Pledge and which has committed to responsible advertising to children.

ESA industry speakers, Roula Clerc-Nassar, Vice-President Insights Europe, PepsiCo and Robert Torck, General Manager, Lorenz Germany, perfectly highlighted the tremendous efforts made by the sector though reformulation and product development as well as the long standing commitments to responsible approaches on consumer communication to help them build a healthier and more balanced diet.

Mathias Adank, ESA President, said that “we at ESA are proud to provide such a platform for dialogue on this important issue”.

A visit to a nearby almond processing facility was made to enable delegates to see first-hand how the processes explained in the classroom were implemented in real-time



Nut Production Course Barcelona, November 2015

Forty five delegates, ESA members and others, travelled from 20 countries to join us in Barcelona for Part III of ESA’s snack production course programme to further their knowledge of snack nut production. Whilst not attempting to make attendees experts, they leave the 3 day intensive course with a thorough, well-rounded grounding in industry best practice from acknowledged experts.

The course was a great opportunity for all the players of the sector to meet, network, and exchange good practices and experiences. The course received excellent reviews. The programme covered expert presentations on nut production from origin and sourcing through harvesting, sorting processing, flavouring and packing. During the course a visit to a nearby almond processing facility was made to enable delegates to see first-hand how the processes explained in the classroom were implemented in real-time. This was also an excellent opportunity for delegates to exchange views on their own processing experiences with operatives in the field.

Combining knowledge and insight with an element of fun is at the heart of the rationale for these increasingly popular courses. The snack production course programme continues with Part I – chips and snacks from raw materials to formed products – which takes place in Berlin, 23-25 May 2016, followed by Part II – chips and snacks from flavouring to end-of-line, to be held in the autumn of 2016.

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

Who we are

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



200 companies
have ESA membership

40 countries
represented by members

80% share
of branded European market

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

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

How we work

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

The ESA board sets the direction of the organisation and approves the organisation's strategic plan for the forthcoming year. It supervises the work of the three working groups and is led by the president.

What we do

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

ESA is instrumental in co-ordinating a united industry view when interacting with the European Commission and the European Parliament.

In practice this means minimising the regulatory burden for members, protecting

their right to produce, advertise and sell their products as well as further promoting the understanding of savoury snacks and snack nuts.

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

Who we work with

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

Some of the organisations ESA works closely with:

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

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

Our structure

Board of Directors

Mathias Adank (President)	
Julie Adams	Almond Board of California
Nelly Bonnet	L'Alliance 7
Katie Carson	Kellogg Company
Christopher Garza	Kellogg Company
Thomas Gauthier-Lafaye	PepsiCo International
Silvia Gorlani	Unichips
Roger Harlacher	Zweifel Pomy-Chips
Anne Klanke	Lorenz Snack-World
Maarten Leerdam	Intersnack Group
Rolf Nilges	Intersnack Group
Armando Santacesaria	Kellogg Company
Barry Synnott	Kerry
Susanna Vitaloni	Unichips
Göran Wadsten	Rosenqvists Food Technologies
Sebastian Emig	European Snacks Association

Changes within the secretariat

In 2015 we said goodbye to our colleague Claire Oates, who left ESA to work in industry.

In her place we welcomed on board Veronica Gantoi in the position of Junior Manager, Events & Membership. Veronica holds a masters degree in European integration and has several years' experience in event coordination, social media and PR.

ESA Secretariat

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

The Snacks Magazine

Michelle Knott	Editor
Jasmin Hill	Advertising & Production



Working group structures

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EC Regulatory Working Group

Issues including:

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

Active participants

Katie Carson (Chair)	Kellogg Company
Johan Wauben	Kellogg Company
Ruth Adewale	PepsiCo International
Jan Hiscock	PepsiCo International
Natalia Douek	PepsiCo International
Anke Müller	PepsiCo International
Anika Nonn	Intersnack Group
Rolf Nilges	Intersnack Group
Horst Kalbfleisch	Lorenz Snack-World
Hermann Meng	Mondelez Deutschland
Marco Blumenthal	Zweifel Pomy-Chips
Valentina Maglio	Unichips
Valeria Tessera	Unichips
Francesca Perrone	Unichips
Oriol Bessa Caserras	Liven
Carine Chincholle-Le Poupon	Sensient Flavors
Paul Herman	Givaudan
Fiona Maguire	Kerry
Aoife Timmons	Kerry
Greg Pearson	McCormick
Tania Gavilan	AFAP
Laure Chauveau	L'Alliance 7
Clarisse Blaquièrre	L'Alliance 7
Carsten Bernoth	BDSI
Julia Gisewski	BDSI
Charlotte ter Haar	VBZ
Marta de la Cera	European Snacks Association
Andrew Curtis	European Snacks Association

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Communications Working Group

Issues including:

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

Active participants

Thomas Gauthier-Lafaye (Chair)	PepsiCo International
Mathias Adank (ESA President)	Zweifel Pomy-Chips
Veronica Ballesteros	Liven
Carsten Bernoth	BDSI
Richard Burrell	Dow Seeds
Katie Carson	Kellogg Company
Julia Gisewski	BDSI
Anders Högberg	Orkla Brands
Katja Reissmann	Lorenz Snack-World
Thierry Marchal-Beck	L'Alliance 7
Valentina Maglio	Unichips
Bernd Ter Glane	Intersnack Group
Willemien Mussche-van-Andel	VBZ
Guido Wolf	Ültje
Olivier Devaux	European Snacks Association

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Nut Processors Working Group

Issues including:

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

Active participants

Julie Adams (Chair)	Almond Board of California
Louise McKerchar	American Peanut Council
Howard Valentine	American Peanut Council
David Norwood	The Nut Association
Jan Willem Ort	European Nut Association
Arie Endendijk	Intersnack Procurement
Abel Santos	Intersnack Procurement
Jos Adriaanse	Intersnack Procurement
Henry Kulnick	Lorenz Snack-World
Bettina Guszewski	Lorenz Snack-World
Joseph Aziz	Unichips
Lieven Plets	Wonderful Pistachios & Almonds
Heidi Vanderswalmen	Wonderful Pistachios & Almonds
Ismael Ben Yaacoub	Wonderful Pistachios & Almonds
Brijesh Krishnaswamy	Olam Europe
Erik van Dorp	Olam Europe
Vitaliy Kulesh	Seasoning and Spice Association
Julia Gisewski	BDSI
Sharon Hall	SNACMA
Marta de la Cera	European Snacks Association

Member services

Advocacy

Representation of members' interests at European and international levels.

Specialist committees

Addressing key issues of direct relevance to the industry.

Media relations

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

Publications

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

Events

Organisation of SNACKEX – Europe's only industry trade show, conference and sourcing event for the savouring snacks industry. Plus various top level conferences and educational courses.

Members' newsletter

Providing monthly online industry news and regulatory updates.

Incident management

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

Industry database

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

Industry statistics

Annual report on the state of the savoury snacks industry across Europe in terms of both volume and value.

Technical advice

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

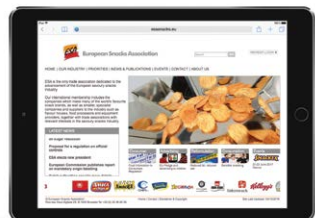
General enquiries and information

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

Publications

Online

www.esasnacks.eu



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

Members' Area

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

- **Risk issues**

Information on those key issues which have been identified and graded in a risk matrix as having a potential impact on members' businesses, together with a quarterly update on the status of action being taken.

- **Industry positions**

Latest aligned industry positions on key issues.

- **Working groups**

Source which member representatives are active in these groups and where to find the latest minutes of their meetings.

- **Fact sheets**

A useful source of information intended for use when communicating to company

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

- **Marketing statistics**

A comprehensive, country-by-country summary of volume and value savoury snack sales in Europe. Divided by sector, updated annually and containing a five year retrospective.

- **Newsletter archive**

Where to find back issues of ESA's monthly members' Snack Bulletin email newsletter.

- **Members database**

A directory of all ESA members, easily searchable by key criteria, including product type, company activity, country,

- **Members Snack Bulletin email newsletter**

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

Print

The Snacks Magazine



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

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

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

Important features published over the last year included sorting and inspection, reformulation, contaminants, extrusion, pellet processing, official controls, advertising to children and tackling waste.

Market profiles covered Turkey, Spain and Hungary.

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

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

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

Join us

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



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

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

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

There are classes of membership for:

Business
snack manufacturers

Associate
suppliers of ingredients, equipment, materials and services to the industry

Trade
other associations and professional bodies



The voice of the industry in Europe

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