



fedima 50 YEARS

ANNUAL REPORT 2018-2019

FEDERATION OF EUROPEAN
MANUFACTURERS AND
SUPPLIERS OF INGREDIENTS
TO THE BAKERY,
CONFECTIONERY AND
PATISSERIE INDUSTRIES

FOREWORD



DEAR MEMBER,

DEAR READER,

FEDIMA celebrates its 50th anniversary. Founded in Milano, in 1969, our federation remains on edge and agile to adapt itself to the time of the moment. After 30 editions of a printed version, we are now happy to share with you our Annual Report in a digital format only as to respect the environment.

The 50 years are a good opportunity to contemplate the past, look at where we are and prepare ourselves for the future. You will see more by reading through.

The bakery ingredients sector has a privileged place within bakery, pastry and confectionery as well as ice cream supply chain. Our ingredients can be found in foods, which are consumed on a daily basis all over Europe.

In this EU election year, a new Parliament and Commission are installed. FEDIMA has outlined its aspirations for the coming years and will communicate these to the European Commission services as well as the newly elected Members of the European Parliament who are active in the EP Committee on Environment, Public Health and Food Safety.

2020 will be a year of evolution for FEDIMA. Continuing the implementation of our strategic priorities, FEDIMA will address a few points differently whilst guaranteeing continuity in acting responsibly towards our customers and the consumers.

Thank you for your interest in our federation!

Johan Sanders
President

Jean Christophe Kremer
Secretary General

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FEDIMA IN A NUTSHELL



200
COMPANIES



12
NATIONAL ASSOCIATIONS



20.000
DIRECT EMPLOYMENTS



5
BILLION € TURNOVER

FEDIMA is the European federation of manufacturers and suppliers of ingredients to the bakery, confectionery and patisserie industries. Our members are national associations across 12 EU Member States and representing an estimated 200 companies across Europe.

We help our members to have access to a European single market in order to facilitate their business activities within the European Union. FEDIMA is the expert voice on matters related to the bakery and pastry ingredients industry.

In 2014, FEDIMA adopted a new vision and mission statement.

FEDIMA's vision is to be the European bakery ingredients platform to support and grow the bread and pastry market.

FEDIMA's mission is to shape a favourable environment to ensure a sustainable and innovative bakery sector.

Being a non-profit trade association under Belgian law (AISBL), our main objectives are:

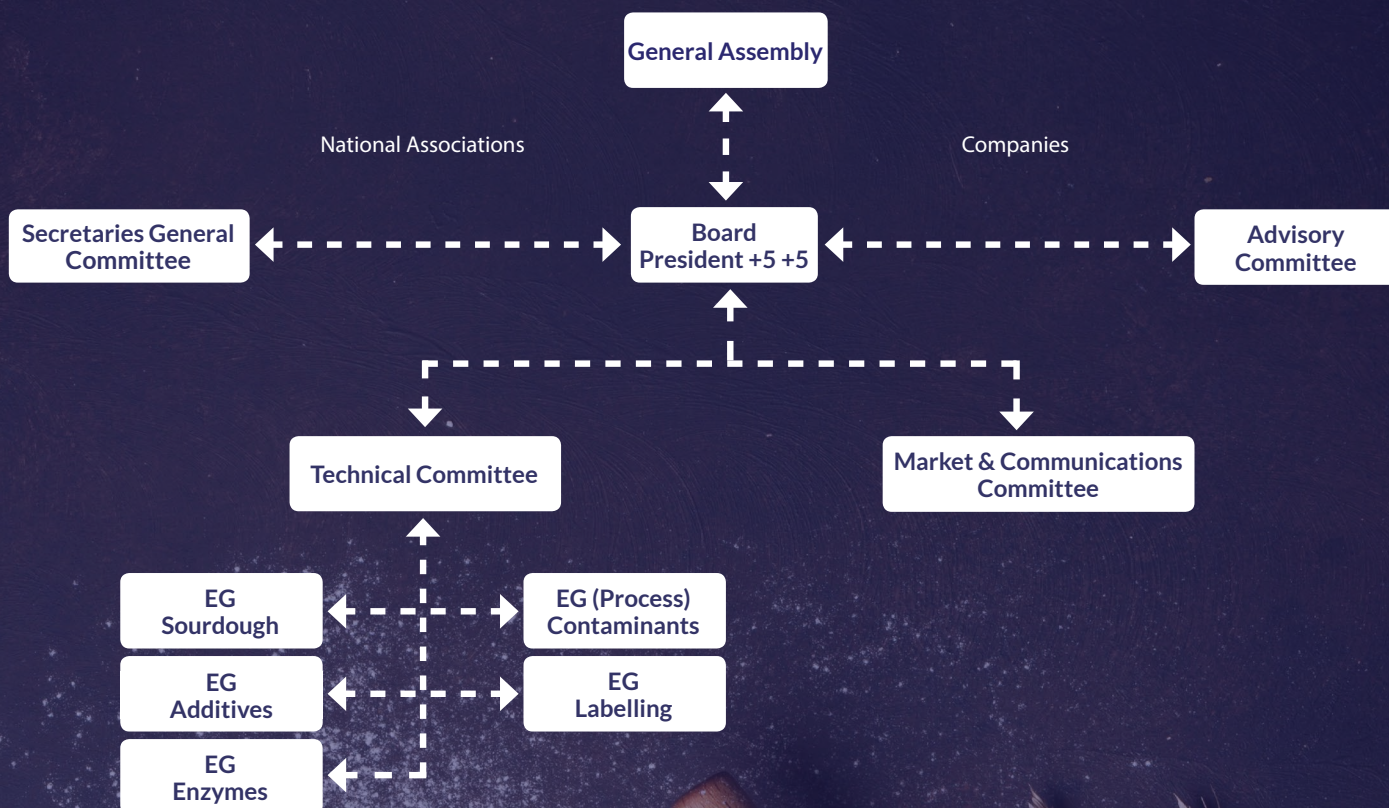
- Market Knowledge - gather and share data and information about our market
- Regulatory and Legislation - become a key partner to regulatory bodies
- Value Creation - promote the fair value of our position in the value chain - connecting the industries
- Reputation - increase internal awareness, reputation, and relevancy with the members

FEDIMA is a sector member of FoodDrinkEurope. FEDIMA is also a partner in the Bread Initiative, a roundtable of sister organisations representing the craft and industrial bakers, the milling sector and yeast manufacturers. Moreover, FEDIMA joined the European Sustainable Palm Oil Advocacy Group (ESPOAG).

FEDIMA adopted its present structure in 2015. Once a year, FEDIMA organizes its General Assembly and the federation's work is carried out in two main committees: the Technical Committee and the Market & Communications Committee, which report to the Board. An advisory role is taken by the Secretaries-General Committee and by the Advisory Committee.



OUR STRUCTURE



The General Assembly is composed of all 12 national associations. The General Assembly elects a Board of 11 persons including the President. There are five Board members proposed by the Secretaries-General Committee and five Board members proposed by the Advisory Committee. All Committees report directly to the Board.

The Secretaries-General Committee has an advisory role to the Board and it provides a forum for exchange between FEDIMA and its member associations in order to develop and implement a coordinated strategy on key issues and to exchange best practices.

The Advisory Committee consists of CEOs of companies in our sector, which are, throughout their subsidiaries, represented by at least one third of our member associations. The Advisory Committee advises the Board on the definition of the strategic objectives of the federation.

The Technical Committee is composed of experts delegated by the companies and national associations. It evaluates all regulatory and food safety issues of interest to FEDIMA and formulates recommendations for decision and actions to the Board. Specific Expert Groups have been created to enable discussions on particular topical or horizontal matters such as additives or enzymes.

The Market & Communications Committee provides market knowledge, promotes the fair value of our position in the value-chain and increases internal awareness, reputation and relevancy with the members. The Committee is composed of representatives of the members (national associations) and/or companies active in the Advisory Committee.

The Secretary-General is responsible of the daily management of the federation in Brussels.

BOARD OF FEDIMA

A Board has been elected for a 2-year period starting 2017. New elections will take place in 2019.

Johan SANDERS
Dawn Foods
President

Enric VALLS
PURATOS
Vice-President

Christian VAN STRYDONCK
UNIFA (Belgium)
Treasurer

Christian SKULTE
ASSITOL (Italy)

Christof CRONE
Der Backzutatenverband (Germany)

Eric SCHUBERT *resigning*
SYFAB (France)

Andrew POLLARD
ABIM (UK)

Marc CUYPERS
Zeelandia

Marco DEVENUTO
AB Mauri

Wolfgang MAYER
Backaldrin

Hervé BOLZE
Lesaffre International

TECHNICAL COMMITTEE

Chair: Gilles MORELLE (Puratos)

There are 5 active Expert Groups (EGs):

- EG Additives – chair: Mark VAN MULDER (Puratos)
- EG Enzymes – chair: Bas VERHAGEN (Puratos)
- EG Sourdough – chair: Georg BÖCKER (E. Böcker)
- EG Labelling – chair: Marlene BIJLSMA (Zeelandia)
- EG (Process) Contaminants – chair: Peter WEEGELS (Sonneveld / OFI)

The joint AMFEP-FEDIMA Expert Group on Enzymes Safety is chaired by Merete SIMONSEN (AMFEP, Novozymes).

MARKET & COMMUNICATIONS COMMITTEE

Chair: Micaela DI TRANA (CSM Bakery Solutions)

Katia MOUVET (Puratos)
Nanno PALTE (Puratos)
Kris DIERCKX (Zeelandia)
Sylwia ZAPOLSKA (Lesaffre)
Thomas LESAFFRE (Lesaffre)
Sandrine LE BAUD (CSM Bakery Solutions)
Sofia BARBOSA (AB Mauri)
Anke NIJHUIS (AB Mauri)
Etienne VERHOEF (Sonneveld)

A LOOK BACK AT **50** YEARS OF FEDIMA

In 1957, the newly formed European Economic Community begins raising food quality standards across Europe. The first regulations (“directives”) on the approximation of food colours were established very prudently in the 1960s.



Naturally, the food sector and business leaders in the bakery ingredients' sector were closely following those rules and regulations. This led to the birth of FEDIMA - the Federation of European Manufacturers and Suppliers of Ingredients to the Bakery, Confectionery and Patisserie industries. The founding meeting was held in Milano (Italy) on 20 May 1969.

FEDIMA started with five founding national associations and quickly grew by adding members in parallel with Europe's membership expansion. The President chaired annual meetings to discuss our key business. Annual meetings were held on a rotation basis in every member country. Walter Cools was nominated Secretary-General and held the post for 25 years.

More laws and regulations were passed in the 1970s, on the creation of a system to protect European consumers from food safety risks (hygiene) and the first food Labelling Directive.

FEDIMA moved its secretariat to Brussels in 1985, closer to the European institutions. Our federation continued to support the European decision makers to define, in particular, the maximum levels of permitted additives in specific food categories, such as bread and fine bakery wares.

In the 1990s, following the Mad Cow Disease and the dioxin contamination crisis, the European Commission stepped into the area of food safety with its “farm to fork” policy to protect consumers and the single market for food.

For instance, FEDIMA helped protect consumers with allergies to particular foodstuffs thanks to our contribution to a workable Food Allergen Directive.

The 2000s have been more about consolidating progress towards a full single market. European Directives have to be transposed into national law which led to various interpretations across European Member States. European Regulations are binding legislative acts and directly applicable.



Picture of the Members present at the foundation of FEDIMA on 28 May 1969. Mr. Van Belle, President, is 6th from left.

This year, FEDIMA launched its LinkedIn account, which marks a new era in the federation's external communication. Through this platform, we disseminate information about our federation's activities as well as the bakery and pastry ingredients sector.

Additionally, this year FEDIMA also developed its manifesto for the upcoming years, which outlines our ambitions.

CHAIRS OF THE TECHNICAL COMMITTEE

- Claudio Ranzani (1986 – 1988) IT – Assitol
- Geert C. Sonneveld (1988 – 2000) NL – NEBAFA
- Huib Van Der Klooster (2000 – 2010) NL – NEBAFA
- Gilles Morelle (2010 - Present) BE – UNIFA

FEDIMA SECRETARY GENERALS OVER THE YEARS

- Walter Cools (1969 – 1994)
- Arnold Van Hecke (1994 – 2005)
- Michel Coenen (2005-2006)
- Jean Christophe Kremer (2006)

FEDIMA PRESIDENTS

- François Van Belle (1969-1971) BE
- J. Lorch (1971-1973) FR
- M. Doeleman (1973-1975) NL
- A. Giacotti (1975-1977) IT
- H. Groeger (1977-1978) DE
- R. Mackay (1978-1980) UK
- François Van Belle (1980-1982) BE
- J. Lorch (1982-1984) FR
- K. Hansen (1984-1986) DK
- G. Bisa (1986-1988) IT
- H.J. Doeleman (1988-1990) NL
- J. Ehlis (1990-1992) ES
- P. Pitta (1992-1994) PT
- H.J. Doeleman (1994-1997) NL
- Åke Oweson (1997-2000) SE
- Eddy Van Belle (2000-2003) BE
- John Gillespie (2003-2006) UK
- Reinhardt Lenné (2006-2009) BE
- Eric Schubert (2009-2012) FR
- Sofia Barbosa (2012-2017) PT
- Johan Sanders (2017-2019) NL

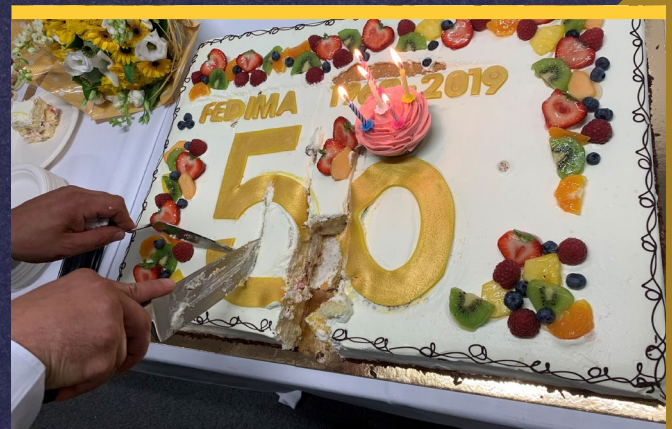


Mr Cools, Secretary-General
(1969 to 1994)



Mr Van Hecke, Secretary-General
(1994 to 2005)

To celebrate FEDIMA's anniversary, we hosted a stakeholder event on 27 June in Brussels. The event had a significant participation and was attended by EU officials, representatives of various Brussels-based trade associations and colleagues. Presentations were delivered by Ms. Sabine Juelicher, DG SANTE Director of Food and Feed safety & Innovation; Ms. Mella Frewen, FoodDrinkEurope Director General, as well as by Johan Sanders, FEDIMA president.



THE KEY INGREDIENTS OF A THRIVING BAKERY AND PASTRY SECTOR

FEDIMA'S AMBITIONS FOR A STRONG EUROPEAN SINGLE MARKET



Informed customers and consumers

FEDIMA's ambitions

- Transparency on products and processes
- Accurate technical information, instructions of use and product labelling

FEDIMA supports a Europe that promotes

A fact-based approach to inform, properly and transparently, customers and consumers about ingredients used in bakery wares.



Food Safety

FEDIMA's ambitions

- Maintain a high standard for food safety and quality
- Provide scientific information to support risk analysis and decisions taken by authoritative bodies

FEDIMA supports a Europe that ensures

EFSA's scientific independence, allowing policy makers to implement risk management decisions that enable innovation and protect competition while ensuring the highest level of ingredient safety.



Bakery sector promotion

FEDIMA's ambitions

- Promote the consumption as well as the variety and benefits of bread and pastry products
- Enhance the image of bread by emphasizing its nutritional value and its European cultural traditions

FEDIMA supports a Europe that protects

The innovation capacity within bakery wares across Europe while promoting harmonization throughout Member States.



Occupational health and safety

FEDIMA's ambitions

- Protect the health and safety of employees
- Studies to improve technologies and gather knowledge about potential hazards

FEDIMA supports a Europe that allows

Self-regulatory initiatives by the food industry, to maintain a fair competition in terms of implementation of food legislation.

FEDIMA'S 4 AREAS OF ACTIVITIES

INFORMED CUSTOMERS
& CONSUMERS



FOOD SAFETY



OCCUPATIONAL HEALTH
& SAFETY



BAKERY SECTOR
PROMOTION





INFORMED CUSTOMERS & CONSUMERS

Transparency on products and processes towards customers and consumers is one of FEDIMA's main objectives. Consumers are becoming increasingly aware of what they eat, hence product information plays a vital role for today's consumer. FEDIMA members aim to provide accurate technical information, instructions of use and product labelling of their products towards their customers. We are putting emphasis on transparency regarding topics such as additives or enzymes. Furthermore, FEDIMA collaborates within the supply chain to guarantee the highest level of clarity.



MARKET INTELLIGENCE

Market knowledge is one of FEDIMA's key strategic priorities. In order to represent our sector appropriately, it is important to have insights in the data and market trends of the bakery and pastry ingredients market, as well as consumer perceptions. This information also supports our positions and can provide legislators with a more consumer-driven perspective.

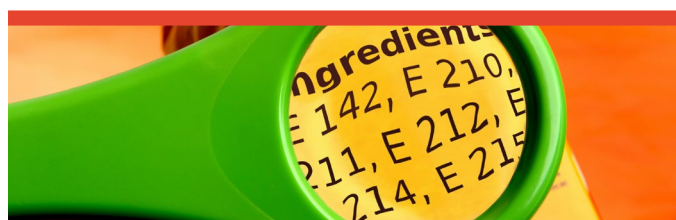
This year, FEDIMA started a trial to collect aggregated sales figures at EU28 level, within the limits of competition law. The purpose for collecting this data is multi-fold; primarily it is useful to quantify the use and consumption of bakery ingredients in Europe, as well as to support our sector's positions with numbers and facts.

FEDIMA has also commissioned GIRA to gather figures on consumption and production of sweet bakery products (viennoiserie, patisserie, fried products) across the European Union. This will be done based on an historical perspective from 2008-2018, but also providing a trend perspective towards 2023. All these activities contribute to strengthening FEDIMA's importance and relevance as a food sector in Europe.

CONSUMER PERCEPTION ABOUT INGREDIENTS

In 2018, FEDIMA commissioned an online survey to verify consumers' attitude and perception of ingredients in bakery wares. A representative panel of 2077 consumers from 8 EU countries were asked how they look at labels and ingredients lists on labels. The survey confirms that a majority of consumers are actively looking at labels and search for more information on ingredients. There is a low consumer understanding on a number of ingredients, including enzymes, but consumers are interested to learn more. Consumers pay attention to food labelling and feel more confident with common names compared to detailed descriptors. Having an understanding of consumer behaviour is extremely insightful to ensure that our sector's products are meeting consumer expectations.

All these activities contribute to strengthening FEDIMA's importance and relevance as a food sector in Europe.



B2B LABELLING

The provision of consumer information in the European Union is harmonised by the so-called FIC Regulation. Nevertheless, in practice, questions can arise about labelling practices specific to our sector. Therefore, FEDIMA has decided to develop an internal B2B Labelling Guidance, as we acknowledge our responsibility to classify our products and to provide customers with the necessary information for an appropriate use of the product. The purpose of this guidance is to provide FEDIMA members with accurate and harmonised labelling practices of (intermediate) food products sold business to business (B2B). This enables them to answer questions from customers and control authorities, to keep them informed, while preserving competition among manufacturers.

PLANT EXTRACTS

In September 2018, the Section Novel Food and Toxicological Safety of the Food Chain of the Standing Committee on Plants, Animals, Food and Feed (SCOPAFF), endorsed a statement as regards the use of plant extracts rich in constituents capable of performing a technological function. The classification of food extracts with «colouring properties» is a guidance from the EU Commission published in 2013. Therefore, Member States recognize the primary intention of use for a technological purpose as a relevant criterion for determining whether the use of a food ingredient results in an (un-authorised) additive use or not.

The 2018 opinion of the Committee, however, appears to be unclear and would benefit from further clarification to understand the scope of this note.

SOURDOUGH

This year, FEDIMA updated its position paper on sourdough. Sourdough production is a traditional bread-making practice that has led to the development of specific bakery ingredients. Sourdough is obtained by the fermentation of microorganisms (bacteria and yeast) which are raw materials found in cereals. Sourdough may also be inactivated to provide typical organoleptic characteristics to the bakery products without leavening capacity. The few legal provisions and codes of practice across some Member States in the European Union must be respected when such products are sold into these markets. A proper labelling must be applied for consumer information allowing to differentiate bread fermented by sourdough from other uses than leavening.



FOOD SAFETY

The EU legislative framework provides an integrated approach to food safety throughout the food system. FEDIMA's expertise on bakery ingredients and processes enables us to provide scientifically based information to support risk analysis and decisions taken by authoritative bodies.

All food business operators are responsible to manufacture food and foodstuffs, which are considered safe. As a primary source of information, FEDIMA contributes to keep its members updated on the latest developments affecting the safety of food.

Bakery products are foods consumed on a daily basis by all Europeans and hence largely contribute to their food intake. Since ages, bread constitutes a cornerstone of the diet. Moreover, pastry, chocolate and confectionery are considered indulgent, or food consumed for the pleasure of eating.

ADDITIVES RE-EVALUATION

Food additives play an essential role in food production and in particular in the bakery and pastry industry. They contribute invaluable to the qualities and characteristics of final products that consumers demand.

The European Union's priority on food additives is the re-evaluation of permitted food additives. FEDIMA actively participates in the process by collecting usage data amongst its members and by providing the data to EFSA through FoodDrinkEurope. Mapping usage data with consumer consumption data is essential to measure dietary intake of food additives.

By March 2019, EFSA published 112 scientific opinions on the re-evaluation of the safety of food additives, covering 191 individual food additives. There are still 147 food additives to be re-evaluated by EFSA before 31 December 2020.

Over the past years, FEDIMA has been contributing to this exercise by providing usage data of our sector categories through FoodDrinkEurope. To this end, our additive experts created a guidance document for FEDIMA members to ensure a harmonised approach in data submissions.

ENZYMES

Enzymes are naturally-occurring proteins that enhance biochemical reactions. They can be obtained by extraction from plants or animals or by fermentation with microorganisms. They are normally added to perform a technological function in the manufacture, processing, and preparation of a wide range of foods including bakery and pastry.

Furthermore, the European Commission has drafted a guidance document on food processes in which enzymes are used. The reason for this is that neither a harmonised approach nor agreement on food processes exist at European level. It was written in consultation with FEDIMA, AMFEP and other stakeholders.

EFSA is currently assessing the food enzymes to be added to a first Union list of approved enzymes, which have all been submitted for assessment before March 2015. This is taking additional time and it is unlikely to have a list of approved enzymes in Europe before 2025. The clarification of the use levels of enzymes used in food processing is still pending. In the meantime, food business operators continue to adhere to the existing legislation.

However, like the food and enzyme industry, FEDIMA has expressed concerns towards the European Commission regarding the lack of transitional measures for newly developed enzymes and their applications. In the absence of legal certainty while the Union list is being established, the innovation and competitiveness of the EU enzyme industry is being compromised.

ACRYLAMIDE

Concerns over the presence of acrylamide in food date back to 2002. The food industry, in close cooperation with national authorities and the European Commission, has taken collective responsibility to develop a Code of Practice as well as a Toolbox to highlight ways to reduce exposure to acrylamide in food.

Commission Regulation (EU) 2017/2158 on mitigation measures and benchmarks levels for the reduction of the presence of acrylamide in food is in force. The new regulation requires that food business operators (FBOs) apply mitigation measures to reduce the presence of acrylamide, proportionate to the size and nature of their establishment.

Following a public consultation to which FEDIMA contributed, the European Commission has adopted in June 2018 a guidance document for FBOs on the application of the legislation. In the meantime, discussions have started with Member States on setting maximum levels for certain foods, beyond the existing benchmark levels, and to monitor other food products currently not targeted.

As acrylamide is also present in fine bakery wares, an information paper has been developed at FEDIMA to provide a guidance to members on the implementation of this regulation on mitigation measures and benchmarks levels for the reduction of acrylamide in food. FEDIMA supports the mitigation of acrylamide formation and provides its members with some practical suggestions on how to reduce exposure to acrylamide in final foods.

On acrylamide, FEDIMA is in close contact with AIBI (association of plant bakeries) especially as regards the planned update of the product-specific brochure, on 'bread products' available on the European Commission website. This aims at helping food business operators to implement measures that reduce acrylamide levels in food.

NANOMATERIALS & TITANIUM DIOXIDE

Over the past year, FEDIMA has been monitoring the developments around nanomaterials and Titanium Dioxide (TiO₂), a permitted food additive in the EU.

There is a debate on labelling and definition aspects of engineered nanomaterials at EU level, as well as political pressure in France that led to the questioning of the safety of Titanium Dioxide (E171). FEDIMA developed an information paper on nanomaterials to share a state of play on discussions around nanomaterials and TiO₂, both at EU and national levels.

Following the adoption in France of a ban on Titanium Dioxide in food as of January 2020, FEDIMA has provided to the European Commission, technical data justifying the use of E171, in order to support the risk analysis and decisions taken by authoritative bodies. Titanium Dioxide is used by a large number of food and drink producers for technical functionality purpose. National bans can constitute a fragmentation of the Single Market. This is why it is important for FEDIMA to always be involved in these topics, in order to ensure harmonisation of the EU single market while guaranteeing the highest level of ingredient safety.





OCCUPATIONAL HEALTH & SAFETY

Health and safety of workers is of utmost importance. FEDIMA works on developing best practices in the industry and performs studies to improve technologies and gather knowledge about potential hazards. We do this in partnership with AMFEP in the joint AMFEP-FEDIMA Enzyme Safety Group (AFESWG). We continue to explore ways to increase occupational safety in the whole bakery chain.



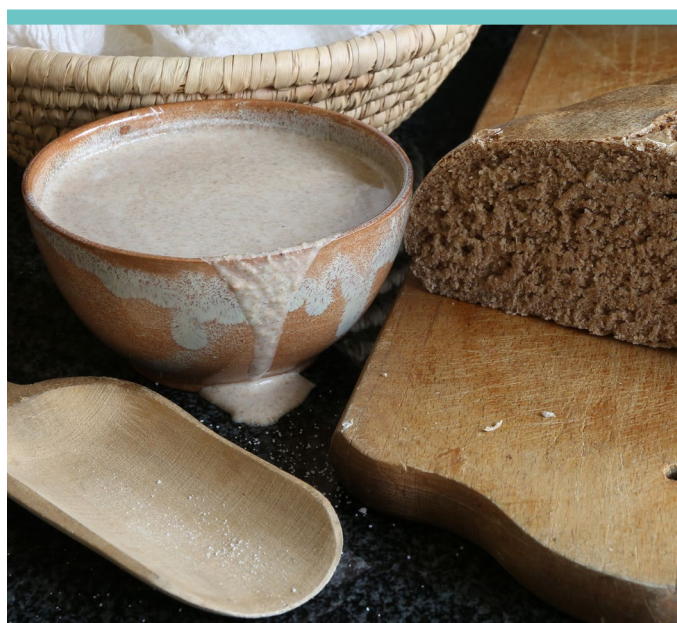
SOURDOUGH

Sourdough is a traditional ingredient that has been used in our industry for centuries.

The Classification, Labelling and Packaging EU regulation (CLP Regulation 1272/2008) which entered into force in 2008, provides obligations for manufacturers and downstream users to classify substances and mixtures placed on the market, including their level of hazardousness. Consequently, some food mixes and bread ingredients such as sourdough may be classified as hazardous and labelled accordingly when they meet the criteria for classification and when sold business-to-business. Non-compliance of CLP could result in sanctions towards the company on the ground of increased risk for the human health, occupational safety and the environment. CLP labelling does not concern sourdough as a food ingredient, but only its handling by professionals.

In this context, FEDIMA recognizes the need for clarification of sourdough concerning its status of being hazardous. FEDIMA is collaborating with FoBiG, German Institute for Research and Consulting on Hazardous Substances, in a project to gather these data through a tiered testing strategy. The outcome of this project should enable us to ensure fair market practices with respect to labelling requirements within a harmonised market.

Furthermore, FEDIMA has the ambition to explain to customers and consumers the benefits of sourdough as an ingredient through simple communication tools.



WORKERS' ENVIRONMENT

Europe has strong rules to protect the safety at the work place; most countries have regulatory requirements in place to protect the health and safety of employees. In every working environment, employers are responsible for the protection of the health of their employees.

Bakery industry employees may be, due to the nature of their work, repeatedly exposed to dust from flour and bakery ingredients, some of which may cause allergies when long-term exposure is not well managed.

Together with AMFEP (the European association of manufacturers and formulators of enzymes), FEDIMA works to increase awareness on the issue of enzyme safety in the bakery industry, mainly on dust management.

In 2018, AMFEP and FEDIMA jointly published the Industry Guidelines on the Safe Handling of Enzymes in the Bakery Supply Chain. This guidance document provides the insights, best practices and tools to control dust exposure thus safeguarding the health of workers throughout the baking industry. In addition, safety posters were developed to inform plant employees about the safe working with enzyme containing ingredients and do's and don'ts – it is currently available in 12 languages.

Furthermore, a series of free webinars will be organised in October-November 2019. They will address the mitigation of occupational exposure to dust and enzymes and are targeted at a variety of operators (millers, artisan bakers, industrial bakers, ingredient suppliers) but also bakery schools. This will be an accessible and dynamic tool to better educate our sector about workers' health and safety.

Furthermore, FEDIMA supports studies that help improve technologies used in our sector. An example is the study on the Heubach instrument, which is a device for the measurement of dustiness of a powder. The objective is to gain insight on the amount of dust that may be generated during the handling of enzymes containing raw materials as to provide empirical evidence upon which health and safety policies may be based. This project was again coordinated in collaboration with AMFEP within the AFES WG.

Our industry continues to work proactively and collectively on developing self-regulatory initiatives and supporting materials to ensure the highest level of safety of workers.



BAKERY SECTOR PROMOTION

FEDIMA's vision is to be the European platform for bakery ingredients, to support and boost the bread and pastry market. This is the reason why promotion of bakery products is one of the key areas of activities of FEDIMA. There are several bread promotion campaigns active on European markets, mainly managed at national level.

In 2015, FEDIMA and other European trade associations active in the bakery supply chain such as CEBP (the European confederation of craft bakers), AIBI (the international association of plant bakers), COFALEC (the European yeast producers), EFM (the European flour millers) created a roundtable to promote the consumption of bakery products in Europe, with bread as a flagship.

The aim of the Bread Initiative is to improve bread's image and to emphasize both its nutritional value and the European cultural heritage associated with this product. At the same time, we want to demonstrate to European consumers the economic importance of the sectors linked to bread.

> www.bread-initiative.eu

Our work is dedicated to the promotion of the variety and quality of bread and pastry products. For this reason, the Bread Initiative partners organised a Forum on EU Promotion Campaigns in June 2019. The event brought together over 40 partners in the bakery sector in Munich, Germany. The purpose was to inform about EU support for promotion campaigns and to encourage the start of promotion activities. One of the speakers was Ms. Aleksandra Mecilosek from CHAFEA, the executive agency in charge of the EU agricultural funds.

The bakery sector represents a considerable economic weight in Europe. The main idea is to leverage bread and bakery products with support of the EU promotion policy of agricultural products which started in 2015. A consortium in the Netherlands and Belgium successfully obtained a 3-year grant for a promotional programme running until 2020. In Spain, a national campaign "Good morning with bread" will be rolled out in 2019 with the aim to highlight the nutritional benefits of bread among children, in the context of a balanced diet.

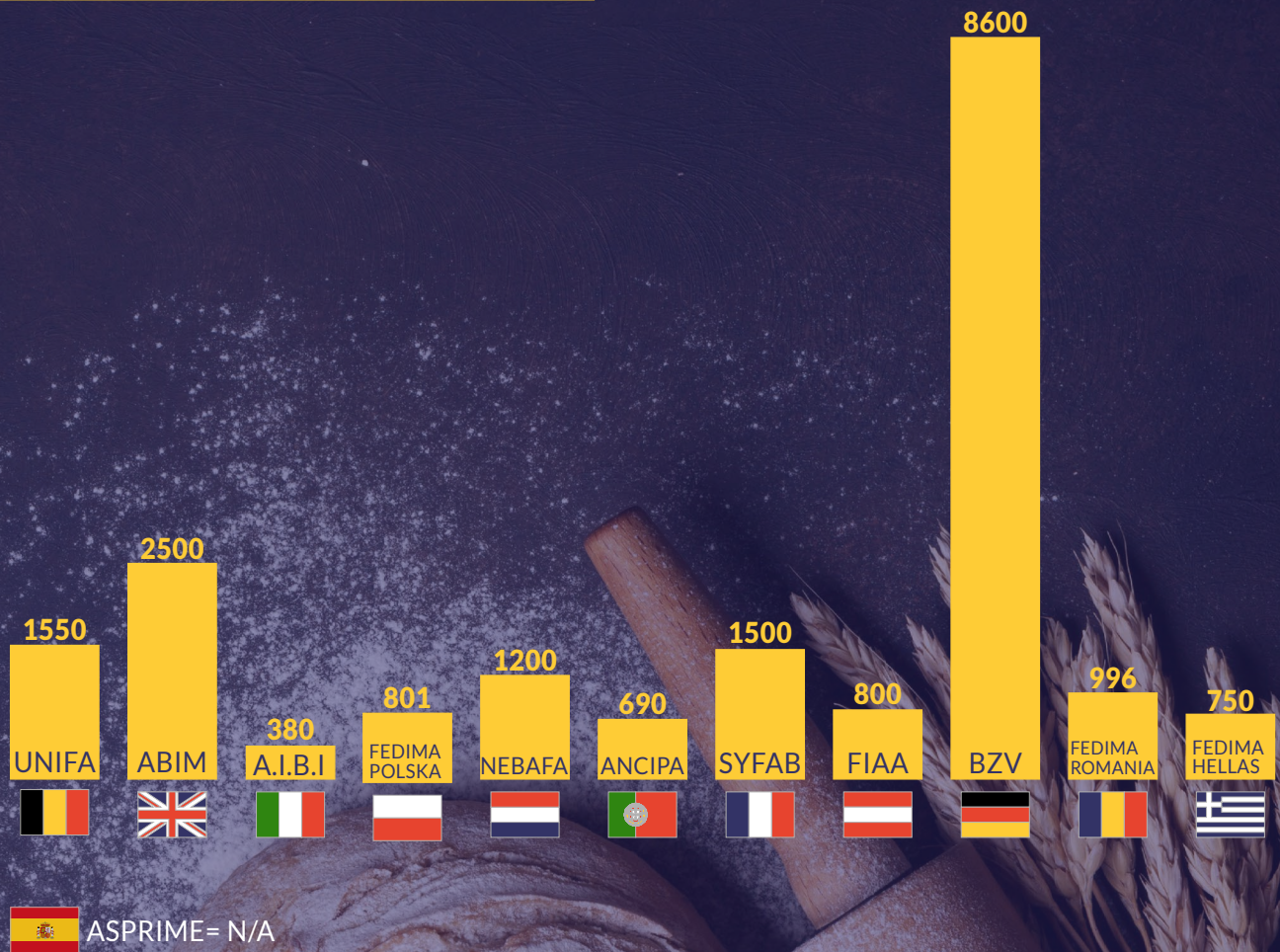





OUR NATIONAL ASSOCIATIONS



STATISTICS

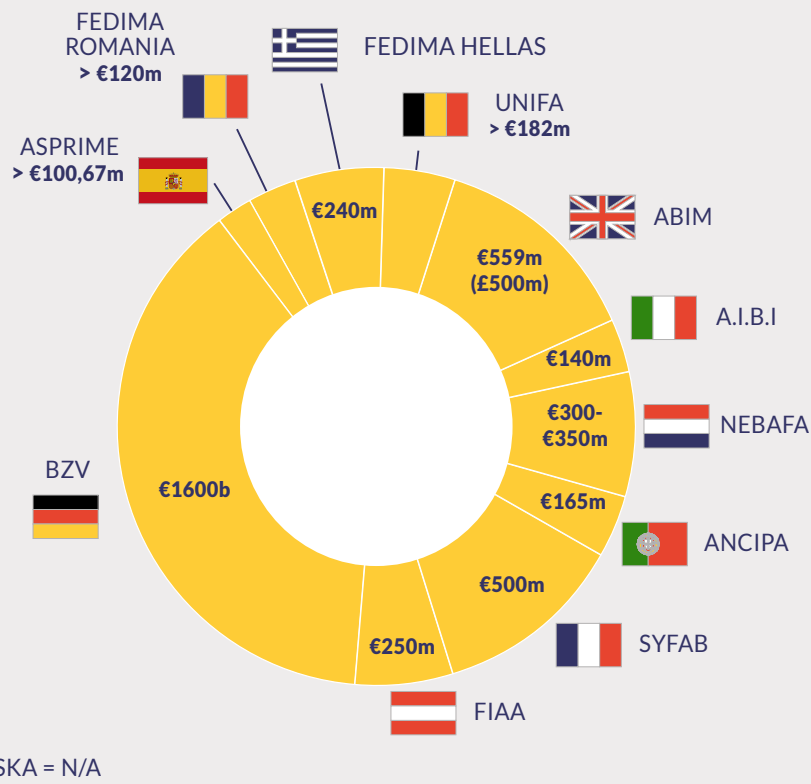
ESTIMATED NUMBER
OF EMPLOYEES IN THE SECTOR



	UNIFA Belgium 	ABIM UK and Northern Ireland 	Fedima Polska Poland 
Name	Union des Fabricants et Importateurs de Matières Premières pour la Boulangerie, Pâtisserie et Glacerie (UNIFA)	Association of Bakery Ingredient Manufacturers (ABIM)	FEDIMA Polska
Chairman	Mr. Kris Dierckx	Mr. David Amos	Mr. Filip Kwiatkowski
Secretary-General	Mr. Jean Christophe Kremer	Ms. Indika Pathirathna	Mrs. Sylwia Zapolska- Szczesniak
Website	www.unifa.be	www.abim.org.uk	
Number of Members	9	15	7
Address	Avenue de Tervuren 188A, post box 4, 1150 Brussels	6 th Floor, 10 Bloomsbury Way, London WC1A 2SL	ul. Narocz 21, 02-678 Warszawa
Telephone	+32 2 761 16 75	+44 (0) 20 7420 7113	+48 (22) 853 36 81
Fax	+32 2 761 16 99	+44 (0) 20 7836 0580	+48 22 84 70 679
E-mail	info@unifa.be	abim@fdf.org.uk	s.zapolska@lesaffre.com
Delegate to the Technical Committee	Mr. Gilles Morelle & Mr. Mark Van Mulders	Ms Indika Pathirathna Mr Richard Hall	

	A.I.B.I. Italy 	ANCIPA Portugal 	NEBAFA Netherlands 
Name	Gruppo Prodotti e semilavorati per Panificazione e Pasticceria dell'Associazione Italiana dell'Industria Olearia (AIBI)	Associação Nacional de Comerciantes e Industriais de Produtos Alimentares (ANCIPA)	Vereniging van de Nederlandse Fabrikanten van Bakkerijgrondstoffen (NEBAFA)
Chairman	Mr. Palmino Poli	Mrs. Cristina Piñol	Mr. Marc Cuypers
Secretary-General	Mr. Claudio Ranzani	Mr. Xavier Pires	Mr. Peter Rijnhout
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TURNOVER DOMESTIC MARKET

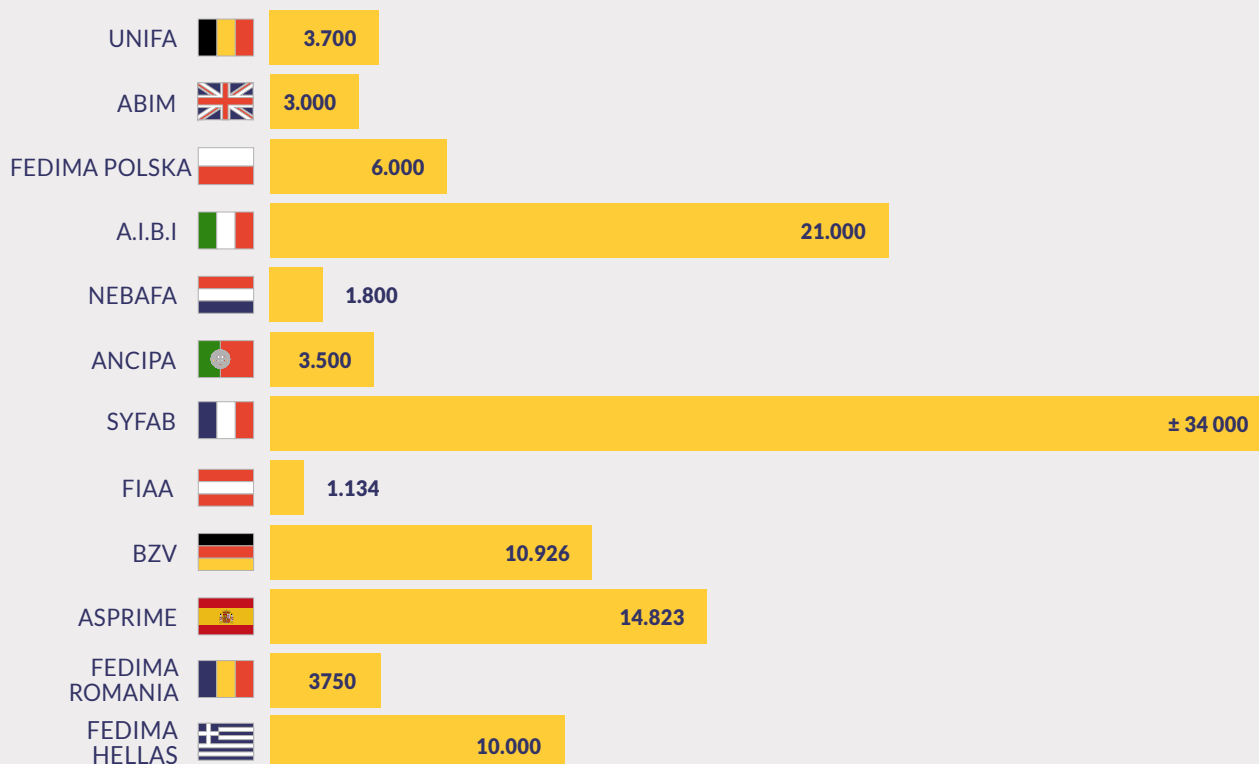


Source: collected by Fedima secretariat from member associations













	SYFAB France 	FIAA Austria 	BZV Germany 
Name	Syndicat National des Fabricants de Produits Intermédiaires pour Boulangerie, Pâtisserie et Biscuiterie (SYFAB)	Fachverband der Lebensmittelindustrie (FIAA)	Der Backzutatenverband e.V.
Chairman	Mr Patrice Bassot	Mrs. Eva Pfahnl	Dr. Detlev Krüger
Secretary-General	Mr. Hubert Bocquelet	Ms. Lisa Jöchlinger	Mr. Christof Crone
Website	www.syfab.fr	www.dielebensmittel.at	www.backzutatenverband.de www.wissensforum-backwaren.de
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	ASPRIME Spain 	Fedima Romania Romania 	Fedima Hellas Greece 
Name	Asociación de de Fabricante de Materias Primas y Mejorantes para Panadería y Heladería (ASPRIME)	FEDIMA Romania	Association of the Raw Materials and Improvers Companies for the Bakery and Confectionery Trades in Greece (FEDIMA HELLAS)
Chairman	Mr. Juan Carlos Puente	Ms. Manuela Banu	Mr. Yiannikas Stelios
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NUMBER OF ARTISAN BAKERS



Source: collected by Fedima secretariat from member associations

		Market share of artisan bakeries	Number of industrial bakeries	Market share of industrial bakeries
UNIFA		+/- 25 (excl. chocolates and biscuits bakeries)	+/- 52,7 in value	+/- 47.3 in value
ABIM		5	60	80
FEDIMA POLSKA		75-80%	18	20-25%
A.I.B.I		86	90	8
NEBAFA		17	196	80
ANCIPA		32%	12 (no updated information)	68%
SYFAB		Bread: 57	± 270 35 000 employees (shops included)	Bread: 32 Pastry: 20
BZV		20%	280	40%
ASPRIME		62	53	38
FEDIMA ROMANIA		15 (share in sales - volume)	53	15 (share in sales - volume)
FEDIMA HELLAS		90	15	10
FIAA		35	3	65

OUR NETWORK

FEDIMA is an industry federation representing intermediate producers, thus part of a complex supply and value chain. Our federation maintains close contacts with the European institutions on topics which are directly affecting us and which require our full attention. In turn, FEDIMA is frequently consulted on a number of issues such as additives, enzymes and acrylamide.

Depending on the arising issues, FEDIMA cooperates extensively with other industry associations.

FEDIMA is a sector member of FoodDrinkEurope. Most of our suppliers and our customers are not members of FoodDrinkEurope. Thanks to its expertise, FEDIMA is able to advise FoodDrinkEurope on bread and baked goods matters. Furthermore, a joint working group was established with AMFEP, the European association of manufacturers and formulators of enzymes.

As a key actor in the bakery supply chain, FEDIMA remains at the crossroad of both suppliers and customers. Brussels gathers many associations representing almost all professions (artisan and industrial bakers, chocolate, biscuits and confectionery manufacturers) and also most of the ingredients we use (flour, cocoa, starch, yeast, sugar, margarine, dairy, additives, enzymes etc.). FEDIMA is in permanent contact with the federations representing our suppliers and our customers to discuss issues affecting suppliers and users and build necessary alliances to advocate our interests.







FEDIMA

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