

fedima

ANNUAL REPORT

2019-2020





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FOREWORD FROM OUR PRESIDENT



Johan Sanders
President

Dear Members, Dear Readers,

I am happy to present to you Fedima's Annual Report for 2019-2020. It has been a year of surprises, challenges, and change, both within Fedima and in the wider world, and this is reflected in this report. The COVID-19 pandemic has required that we all, as individuals, as companies, and as an association, adapt to different habits and rules. Furthermore, Fedima has undergone its own period of transition with a new Secretariat and a transformed Technical Committee, and our activities for the year have in turn, been adjusted to meet these developments and face the ongoing COVID-19 reality.

This year, the priority has been the strengthening of Fedima's ties with its national member associations, as well as the ties between the members themselves. Through in-person, and now virtual, one-on-one meetings between members and our association manager, to the launch of a monthly newsletter ensuring that members are fully informed on Fedima's activities, we have continued to work towards a stronger Fedima Community.

This has been just one among the main achievements of the year, which has seen all our focus areas be built out and developed. Fedima launched its Sustainability Committee, to offer the association concrete means for our industry to work towards a sustainable future. The Technical Committee worked on building out the practical network needed to address the issues of our sector, conducting ongoing liaisons with industry partners and stakeholders. The Marketing and Communications Committee worked towards developing a Sourdough Campaign, and continued in its activities of gathering market data and informing our network of Fedima's work and achievements.

Much of this work is a reflection of the new Secretariat, which was launched in January 2020, and which is working tirelessly to expand upon what the previous Secretariat achieved, in order to allow Fedima to represent its members' needs effectively.

I hope you enjoy reading this report, and thank you for your interest in Fedima!

Johan Sanders,
President of Fedima



VISION



To be the European bakery ingredients platform to support and grow the bread and pastry market



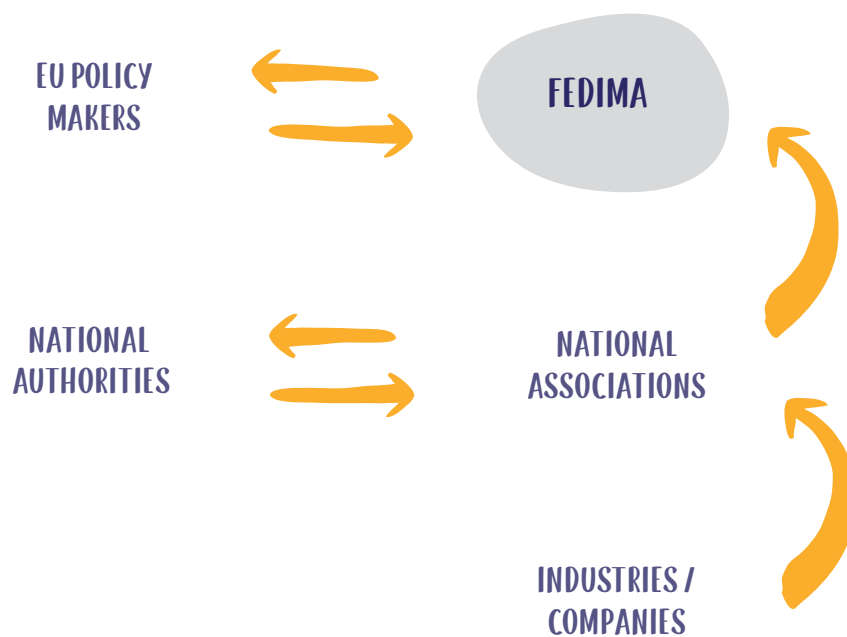
MISSION

To shape a favourable environment to ensure a sustainable and innovative bakery sector

FEDIMA AT A GLANCE

Fedima is the European federation of manufacturers and suppliers of ingredients to the bakery, confectionery and patisserie industries, representing the interests of more than 24,000 direct employees across Europe. Its members are national associations in 13 European countries and represent around 200 companies across Europe.





Fedima engages at EU level on relevant policy issues, with the aim of ensuring its members have access to a single European market, and of facilitating their business activities within the European Union. The association has longstanding expertise on matters relating to the bakery and pastry ingredients industry.

In 2019, Fedima celebrated the 50 year anniversary of its founding. In the current era, where the market depends on regulation and public policies, and where customers are increasingly exacting as to what they consume, Fedima has worked to ensure that it continuously grows and adapts to changing realities.

With the renewal of the EU institutions last year, Fedima was presented with an opportunity to work towards a new stance and provide a strong, credible response to decision-makers and customers. With this in mind, Fedima entered into a new phase, working with a new Secretariat,

in order to build upon Fedima's strategy, respond to the new political and market challenges, and establish Fedima's place on the global as well as European stage.

Alongside its own work, Fedima is also a part of several groups which aim to address specific issues in the wider industry. By working alongside other associations and industry players, Fedima can expand its place in the sector, whilst also providing valuable contribution to discussions and decisions on topics of common interest. Fedima is a member of FoodDrinkEurope, actively participating in their meetings and events. Fedima is also a partner in the Bread Initiative, a roundtable of organisations which represent the craft and industrial bakers, the milling sector, and yeast manufacturers. Furthermore, as part of its sustainability actions, Fedima is a part of the European Sustainable Palm Oil Advocacy Group (ESPOAG).

WHAT FEDIMA DOES

In order to actively support its members and in turn their members, Fedima takes strong action in four fields:

1

Market Knowledge

Gather and share data and information about Fedima's market and the principal categories of interest, with the aim of better understanding any developments in the sector.

2

Regulatory and Legislative Affairs

Become a key knowledge partner for regulatory bodies, offering positions on main policy areas.

3

Value Creation

Promote Fedima's position in the value chain and establish connections across the industry.

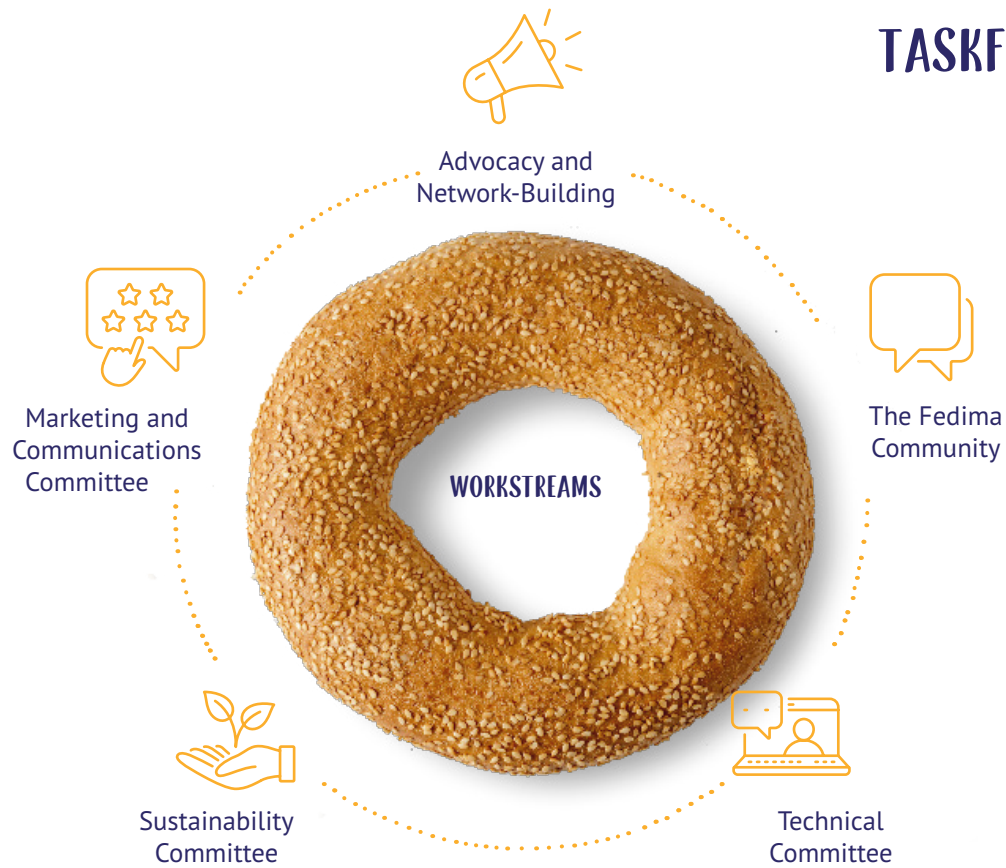
4

Reputation Building

Increase internal and external awareness of activities, expand influence in relevant sectors, and work towards being a leader in the sector.

Through five workstreams with diverse working groups and committees, Fedima works to address multiple interrelated subjects of interest, with the ultimate aim of further developing trust and reputation, increasing stakeholder engagement and member participation in crucial areas, and establishing the association as a thought-leader in the sector.

TASKFORCE



HOW FEDIMA IS STRUCTURED

Government

The **General Assembly** is the highest governing body composed of all thirteen national associations. The General Assembly elects a Board of eleven people including the President. Five Board members are proposed by the Secretaries-General Committee and five Board members are proposed by the Advisory Committee. All committees report directly to the Board.

Management

The **Board** is the strategic leadership and management of the association, composed of elected representatives from member associations (five Presidents) and companies (five CEOs), elected for a two-year period and supervised by the President of Fedima.

Advisory

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

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



Experts

The **Taskforce** consists of five workstreams, represented by a senior expert and assisted by the Secretariat. Each workstream reports directly to the Board. These five interdisciplinary workstreams work alongside each other with the aim of pushing forward the work of Fedima, and expanding its reach and influence both internally and externally.

- 1 **Advocacy and Network-Building** strengthens the policy positions and shapes crucial pieces of legislation. It does so by creating, consolidating, and expanding a network of institutional contacts to promote Fedima's message and legitimise Fedima's position as a key interlocutor to regulatory bodies. The Secretary-General of Fedima, Dirk Van Ham, is the spokesperson for Fedima on policy matters, supported by the Secretariat.
- 2 **The Fedima Community** ensures strong representation of Fedima at both national and European levels, increases internal and external awareness of the association's activities, helps with reputation building in relevant sectors, and encourages regular and ongoing exchanges with Fedima's members. By streamlining the communication of work and information between the national associations and Fedima, the Fedima Community works towards increased horizontal cooperation in order to maximise the impact of work done at EU and national levels. The Community is coordinated by the Association Manager, Isabelle De Vinck, who ensures that there is strategic alignment, with the support of the Secretariat.



3 Technical Committee is composed of experts delegated by the companies and national associations. The Technical Committee evaluates all public policy and regulatory developments that impact Fedima members. The Committee also provides guidance to its members, to enable them to navigate the regulatory landscape. Specific expert groups have been created to enable discussions on specific topics or horizontal matters. The expert groups are composed of representatives on behalf of the members (national associations) and/or companies active in the Advisory Committee. The Technical Committee is led by Gilles Morelle, supported by the Secretariat.

4 Sustainability Committee is composed of experts delegated from the companies and national associations. The Committee serves as a platform to share ideas and best practices on sustainability. It is tasked with evaluating and monitoring the actions and commitments undertaken by the industry. It identifies the sustainability concepts and scope within Fedima with the view to act as a responsible bakery ingredients industry, and meet the Sustainable Development Goals set out by the United Nations in 2015. It also builds out common positions and commitments on policy issues related to sustainability and identifies long term project(s) that can be carried out under Fedima's leadership in order to bring sustainable change to the industry. The Chair of the Sustainability Committee is Jean-Philippe Michaux, who is supported by the Secretariat.

5 Marketing and Communications Committee provides market knowledge by gathering information and insights on specific topics from the industry, in order to build out compelling narratives to inform policy makers as well as consumers. This Committee also works to promote Fedima's position in the value-chain and to develop relevant communications materials for the members to use. The Chair of the Marketing & Communications Committee is Thomas Lesaffre, who is supported by the Secretariat.

The **Secretariat** works hand in hand with the taskforce and is responsible for the technical work as well as the organisation of internal and external meetings. It has a proactive approach to laying the groundwork for each expert group and committee, and facilitating the ongoing vision of Fedima.

Fedima would like to thank its previous Secretariat for navigating the association's arrival at this juncture.







INTRODUCTION TO OUR WORKSTREAMS

The new Secretariat developed a strategy to approach the opportunities and challenges that Fedima is currently facing, structured around a taskforce which aims to strengthen Fedima's position in the EU political landscape and ensure a sustainable bakery and pastry industry.

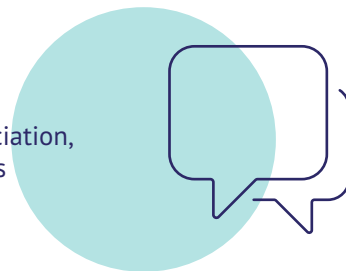
In a work programme which covers 12 months, from January 2020 to December 2020, the new Secretariat is working to build the right foundation to respond to Fedima's long-term vision. The work programme builds upon the work up until 2019, and is reviewed and adjusted according to Fedima's and the industry's needs and priorities. In fact, it has already been adapted to changing needs brought about by the ongoing COVID-19 pandemic of 2020.





THE FEDIMA COMMUNITY

Establish a strong and representative association,
streamlining communication with members



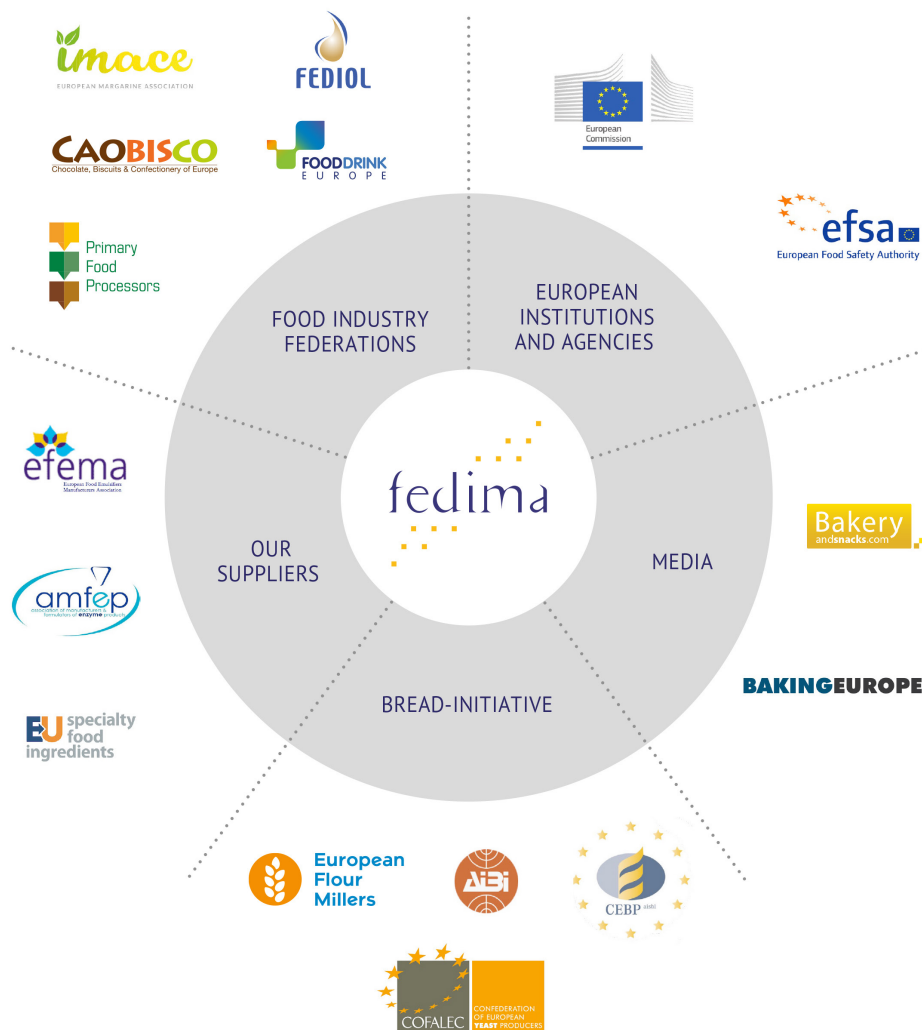
SUSTAINABILITY COMMITTEE (new since 2020)

Identify sustainability concepts and projects in order
to act as a responsible bakery ingredients industry
and meet the Sustainable Development Goals



ADVOCACY AND NETWORK-BUILDING

From food quality to labelling, from workers' safety to consumers' information, the raw bakery business is impacted on a daily basis by new EU policies and regulations. At Fedima, we want to positively contribute to the achievement of high food safety standards and the protection of our workers, while promoting the highest level of transparency towards our customers and the consumers. However, without advocacy and coalition building, it is almost impossible to achieve any meaningful change. Therefore, we have built strategic networks and coalitions, which include food industry federations, ingredients' trade associations, as well as ongoing contact with European institutions and media.



Leverage the sector

In 2019-2020, Fedima has proactively cooperated with a wide range of stakeholders, as outlined below, building relationships and synergies with other industry players.

FoodDrinkEurope (FDE)

A united voice is a louder and stronger voice and can hence make the difference. That is why Fedima is an active member of FoodDrinkEurope, a Federation that brings together key European trade associations and companies in the EU food and drink industry. Fedima's Secretariat is part of several working groups, active in the areas of food safety, consumer policy, environment and sustainability. Alongside FDE, Fedima wants to make sure that Europe continues to have the highest quality and safest food in the world, while promoting the safety and wellbeing of food workers as well.

The European Sustainable Palm Oil Advocacy Group (ESPOAG)

Fedima also represents manufacturers that use palm oil in their products. Palm oil provides an important source of revenue for many farmers in South East Asia and Africa. However, the industry is concerned about the potential long-term environmental and social impacts of tropical deforestation. Therefore, Fedima joined other European trade associations active in the palm oil supply chain, namely Caobisco (chocolate), AIBI (plant bakers), Fediol (vegetable oil), and Imace (margarine), to form ESPOAG. This advocacy coalition was born with the aim of promoting the use and consumption of sustainable palm oil in Europe.

Bread Initiative

Bread is a staple food for Europeans, but its consumption has been falling in recent years. Therefore, since 2015, Fedima and other European trade associations active in the bakery supply chain created a roundtable to promote the consumption of bread in Europe. The members of this group are CEBP (the EU craft bakers),

AIBI (plant bakers), COFALEC (European yeast producers) and EFM (European flour millers). The Bread Initiative is actively working to boost bread's image and to emphasise both its value and the economic importance of the industrial sectors linked to bread.

ADVOCACY ACTIVITY IN THE SPOTLIGHT: COVID-19 RESPONSE

The COVID-19 outbreak has significantly impacted the businesses we represent, especially small and medium sized enterprises. At Fedima, we have been working closely with our members to address significant challenges, including logistics disruptions and decreases in sales. We have closely monitored the evolution of the crisis and have implemented advocacy activities in synergy with FoodDrinkEurope and the Bread Initiative roundtable. Our goal is to inform and raise awareness amongst EU decision makers regarding the challenges faced by our industry during the outbreak.

To this end, in March 2020, we launched an internal questionnaire to gather information on the impact of COVID-19 on business activities. Data was then conveyed to FoodDrinkEurope, which prepared a letter for the European Commission, addressing the key concerns of the European food industry. Furthermore, in April 2020, Fedima, along with the Bread Initiative members, addressed an informative letter to 11 European Commissioners, stressing the need to safeguard consumers' access to bread and bakery products in the European Union and neighbouring countries.

In line with Fedima's requests, the European Commission implemented the "Guidelines for border measures" and created the Green Lanes, to facilitate freight transports, while preparing a comprehensive economic response to support our operators affected by the outbreak.



In January 2020, Fedima began working with a new Secretariat. This new Secretariat decided to focus on emphasising and reinforcing the relationship and flow of communication between Fedima and its members, the 13 national associations.

The Fedima Community aims to serve as a forum to bring together national associations, who can share perspectives on the public policy and communications actions being worked towards by the committees and the Secretariat. This allows for the creation of a consistent and aligned approach to policy issues and to strategy building, which takes into account the needs of the diverse national realities.

Fedima's effectiveness at European level, through its capacity to strengthen the voice of the industry in the EU decision-making process, depends upon a deep level of cooperation and coordination with its member associations. The creation of a strong and coherent Fedima Community of national associations is crucial, as is enabling equal representation of these associations across the discussions and activities which take place at Fedima level.

With this in mind, between January and June, Isabelle De Vinck, Association Manager, embarked on a tour of the national associations, to meet them, understand their reality and priorities, and to present the new Fedima Secretariat and Fedima's Work Programme. The outbreak of the COVID-19 pandemic has limited Isabelle's in-person rounds of engagement but meetings were held virtually from March onwards.

After having met most of its members, Fedima started opening up horizontal and vertical lines of dialogue between national associations, to solidify a greater sense of community. A hotline was created to allow Secretaries General and Presidents of associations to communicate with each other, and the Secretaries General Committee gathered (virtually) in June.

SECRETARIES GENERAL COMMITTEE

On 16 June 2020, the Secretaries General of Fedima's national associations met virtually. This meeting was an opportunity to discuss national associations' realities in the face of the global pandemic and how COVID-19 was handled in their respective countries. The Secretaries General also shared updates on their policy priorities and the incorporation of sustainability into their work. This type of discussion allows Fedima to better align its activities with the needs of its associations. This meeting was the occasion for Isabelle De Vinck, Association Manager of Fedima, to present a new kind of collaboration between Fedima and its member associations: the Fedima Community. This Community is based on horizontal collaboration, the sharing of best practices and the development of tools to communicate among the Community (a common email address, webinars, etc.). New meetings of this kind will be carried in the coming years.



The Technical Committee, led by its Chair, Gilles Morelle, follows all policy and regulatory developments in the areas of food safety, labelling, and workers' safety. The Committee is organised into expert groups, each providing expertise on specific topics.

The Committee's activities cover 3 key areas, as outlined below.



Food Safety

At Fedima, we keep our members updated on the latest developments affecting the safety of food.

While our focus lies on ingredients (i.e. additives and enzymes), we also look at the mitigation of possible contaminants in food production.



Occupational healthy & safety

At Fedima, we support the industry by providing guidance on occupational health and safety. We also play an active role in guaranteeing the highest level of workers' safety.



Information to customers & consumers

Our members aim to provide accurate technical information, instructions of use and product labelling to their customers.

We are also collaborating within the supply chain to guarantee the highest level of transparency towards the end consumer.

In 2019-2020, the Technical Committee focused on several subjects, as outlined below.

Additives

■ Clean label and plant extracts

In the absence of a harmonised definition, the concept of “clean label” can be interpreted in multiple and sometimes conflicting ways, generating uncertainty around the term. The industry has different views on which ingredients should be included or excluded from foodstuffs bearing a clean label. Therefore, at Fedima we are preparing a document with statements on clean label and plant extracts. The document will be used as a reference point by Fedima’s members, to responsibly communicate with their customers.

Enzymes

■ Safe handling of enzymes

In the autumn of 2019, in cooperation with Amfep (the Association of enzymes’ producers), Fedima produced a series of free webinars on the safe handling of enzymes. These webinars addressed the mitigation of occupational exposure to dust and enzymes and targeted millers, artisan bakers, industrial bakers, ingredient suppliers and bakery schools.

On top of that, in cooperation with Amfep, we continue to support 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 the dustiness of powders.

■ Enzymes’ labelling

At Fedima, we have formed an alliance with Amfep and AIBI (Association of Plant Bakers) to address the potential implications of the use of enzymes and labelling in bakery wares. A project in Germany is set to increase some of the Member States’ concerns about activity/functionality of enzymes in baked goods. These concerns will most likely be carried over to other enzyme uses in food processing. We have therefore reached a joint position on how enzymes could be labelled, if it comes to that. We have also addressed a letter to FoodDrinkEurope outlining that using the word “enzymes” to label foodstuffs is appropriate, as it is in line with the principle of not misleading the consumer. The proposal was welcomed by the Association.





(Process) Contaminants

■ Acrylamide

As outlined in our position paper, published in May 2020, Fedima supports the Maximum Benchmark Levels (MBLs) of acrylamide in foodstuffs, set out under Commission Regulation (EU) 2017/2158. Those MBLs allow the bakery sector to implement measures to mitigate acrylamide formation while meeting consumers' expectations. Fedima will also proactively contribute to the revision of the Regulation, which is expected in 2021.

■ Opiates in poppy seeds

In 2020, Fedima has proactively contributed to the debate around the setting of harmonised maximum levels (MLs) of opium alkaloids in poppy seeds. With a view to reduce the risks for the end consumers, and in line with the 2018 EFSA opinion, Fedima recommended that the European Commission set a unique maximum level of morphine and codeine in poppy seeds. This ML amounts to 10 mg/kg, with a two-year transitional period, for suppliers to adjust.

Labelling

■ Origin indication

Fedima has prepared an internal paper to guide members towards the implementation of Regulation (EU) 2018/775. Applicable since 1 April 2020, the Regulation provides for the voluntary indication of the country of origin or place of provenance on foodstuffs, in cases where the primary ingredient has a different origin/provenance. In principle, these rules are not directly applicable to intermediate products. However, the document provides guidance when Fedima members label the origin of intermediate materials and their customers decide to transfer this information to the end product.

■ B2B labelling

At Fedima, we are working on an internal business-to-business (B2B) Labelling Guidance, as we acknowledge our responsibility to inform customers on the appropriate use of intermediate products. The purpose of this guidance is to report to our members on harmonised labelling practices of (intermediate) products sold B2B. This enables them to answer questions from customers and control authorities, to keep them informed, while preserving competition among manufacturers.

Sourdough

■ Understanding sourdough

Our members face the difficulty of classifying and defining sourdoughs, which lies in its inherent use as a leavening agent and/or as an ingredient. We have therefore worked towards the establishment of a common understanding on the forms and the uses of sourdough. The latter converged in a document entitled “Understanding Sourdough”. Sourdough was eventually defined as a food ingredient obtained from flour of cereals or pseudo-cereals, fermented by lactic acid bacteria and yeast.

■ Sourdough and CLP Regulation

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. CLP labelling does not concern sourdough as a food ingredient, but only its handling by professionals. In this context, Fedima has collaborated with FoBiG, the German Institute for Research and Consulting on Hazardous Substances, in a project to gather evidence on the hazardousness of handling sourdough for professionals in the sector.

Wholegrain

■ Proliferation of wholegrain definitions

In the absence of a harmonised definition, several stakeholders have started working on their own definition of wholegrain food; this could become a barrier to trade for our members. Therefore, in June 2020, Fedima set up a temporary taskforce, with a view to tackle the existing wholegrain definitions and approaches that exist across the EU.





SUSTAINABILITY COMMITTEE

In 2019, the General Assembly decided to create a committee dedicated to issues related to Sustainability. This brand new Sustainability Committee is composed of representatives of the Advisory Committee's companies and national associations, and is chaired by Jean-Philippe Michaux, from Puratos. It aims to serve as a platform to share ideas and best practices on sustainability, evaluate and monitor the actions and commitments undertaken by the industry, identify the sustainability concepts and scope within Fedima, and identify long term projects to be carried out under the Fedima leadership to bring sustainable change to the industry.

Sustainability is a horizontal and cross-cutting issue. Since its first gathering in January 2020, the Sustainability Committee is working in synergy with other Fedima bodies, national associations, and European actors like FoodDrinkEurope, with the help of the Secretariat.



The main actions of the Committee since its creation are:

Building Blocks

The Sustainability Committee identified six main areas of concern for the bakery and patisserie industry, selected on the basis of the already existing sustainability programmes of companies within Fedima’s membership.

	<p>Sustainable Packaging which includes plastic packaging.</p>
	<p>(Food) Waste & Circularity which concerns the question of waste not only in our industry but also at retail and consumer level.</p>
	<p>Responsible sourcing which encompasses the sourcing of raw material and the use of water and electricity.</p>
	<p>Energy Emissions which has to do with CO² emissions and energy emission reduction.</p>
	<p>Nutrition & Health encompassing the impact of our products on consumers’ well-being.</p>
	<p>People & Communities which takes into account the question of the sustainability of the industry’s ecosystem, bakers, producers, and workers.</p>



Analysis of a sustainable bakery and patisserie industry

On the basis of these three building blocks, members of the Committee have designed a simple survey on the different actions, initiatives, priorities, and ambitions taken by the industry on the issue of sustainability. With this survey, Fedima aims to conduct a European-wide analysis of the sustainability commitment of the industry, as well as nation-wide analyses for national associations that have indicated interest.

The survey has been shared with companies that are part of Fedima's Advisory Committee and the companies that are members of national associations, with the help of the Fedima Community. It was completed by 24 companies, painting a fair picture of the industry.

A preliminary analysis of the survey results from the Committee indicate that all six topics are important for companies, with various degrees of willingness to do more and appetite for Fedima to act. The Committee identified three action areas:

- Topics where Fedima can act: Sustainable Packaging
- Topics where Fedima can support its members: (Food) Waste & Circularity, Responsible Sourcing, Energy Emissions
- Topics where Fedima can monitor developments: Nutrition & Health, People & Communities

Detailed results and conclusions of the survey will be presented to all Fedima members in November 2020 to start a larger debate and create engagement on the issue. Next steps for the Committee will be determined on the basis of this analysis and its results.

Spotlight on the EU 'Farm to Fork' Strategy for sustainable food

Fedima is following the policy developments at the European Union level closely. In May 2020, after several delays, the European Commission published its 'Farm to Fork (F2F) Strategy for sustainable food'. Fedima shared an extended analysis of the document with its members.

The F2F strategy outlines the European food policy for the next 5 years. It describes the actions, legislative, regulatory, or non-regulatory, that the Commission will undertake during the course of its mandate.

Overall, the F2F strategy will greatly impact producers of raw materials (farmers), end products (foodstuffs), and packaging. In principle, the new EU food policy does not introduce major changes for the producers of intermediate materials. Nonetheless, the impact of the new food legislations and regulations on the production and retail of food products may have indirect repercussions on the B2B industry.

IMPORTANT ANNOUNCEMENTS:

- There is a new initiative to improve the corporate governance framework, including a requirement for the food industry to integrate sustainability into corporate strategies and an EU code of conduct and monitoring framework for responsible business and marketing conduct in the food supply chain (2021).
- The Commission will promote the harmonisation of the front-of-pack nutrition labelling and will consider harmonising "voluntary green claims and develop a sustainable food labelling framework" that covers the nutritional, climate, environmental, and social aspects of food products. Nutrient profiles will be implemented in 2022 to limit the use of nutrition and health claims on foods high in fat, sugar and/or salt.
- In 2022, the Commission will revise the EU legislation on Food Contact Materials to promote a reduction in the use of hazardous chemicals in packaging and an increase in the use of more sustainable materials. Although this will mostly concern retail and consumers, the whole food industry will therefore have to invest in sustainable packaging.

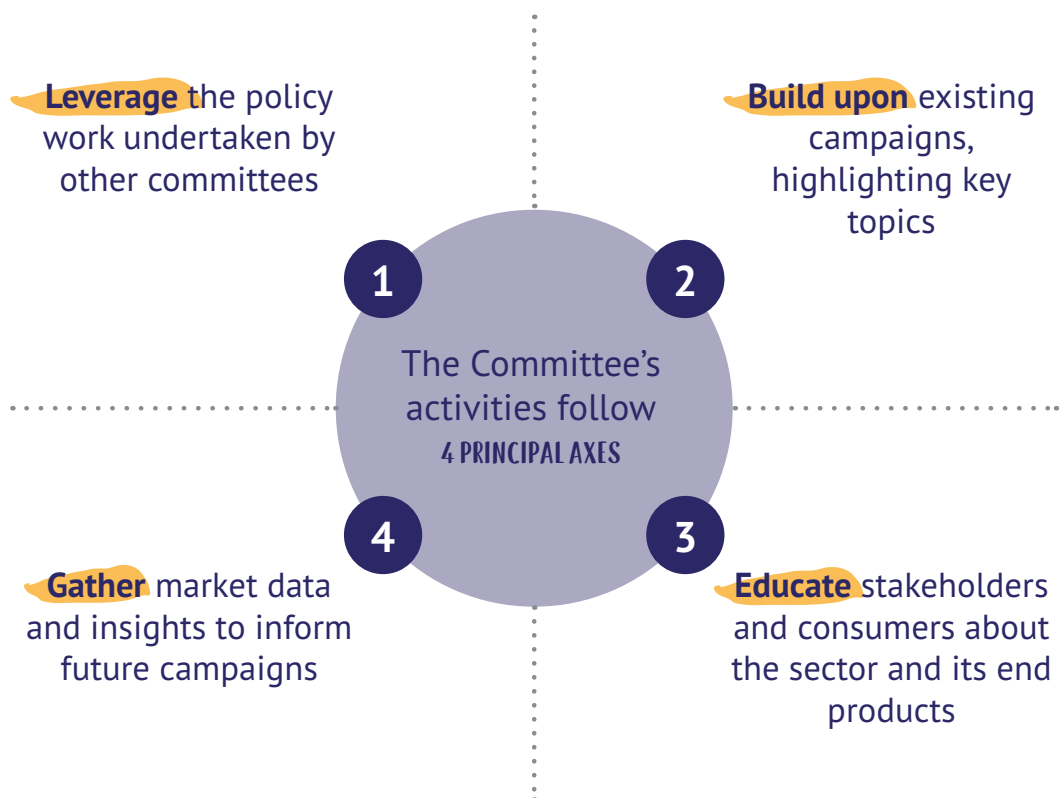




MARKETING AND COMMUNICATIONS COMMITTEE

The Marketing and Communications Committee, led by its Chair, Thomas Lesaffre, ensures that Fedima's ongoing work and activities are communicated both internally, among members, and externally, to policy makers, stakeholders, and industry players.

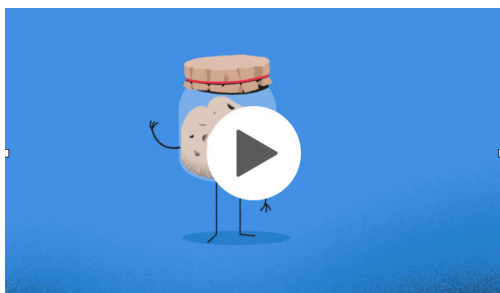
The Marketing and Communications Committee activities aim to help Fedima expand the bread and pastry market, improve end-consumers' perception of the industry and of its end products, and position the association as a reliable and important player on the European bakery scene.





This year, the Marketing and Communications Committee has focused on several key areas of activity:

- 1 Highlighting the Sourdough Survey and Sourdough Position Paper of 2019 by building out communications materials that will be used in a wider campaign to promote a positive image of sourdough. This communications campaign is expected to take place at the end of the year, with a core sourdough character to explain the history, value, naturalness, and taste of this ingredient.



- 2 Building upon the momentum of Fedima's social media presence, through regular, topical LinkedIn posts, both in regards to Fedima's own updates, and relevant industry news. Since joining the network, Fedima has connected with pertinent voices in the industry, including stakeholders, policy makers, its own members, and many others. Through this network, Fedima remains up to date with the discourse trends in the sector, and communicates on issues that are important to the industry, such as policy and legislative updates, and association news.
- 3 Working alongside the Bread Initiative, whose aim is to improve bread's image and to emphasise both its nutritional value and the European cultural heritage associated with this product.
- 4 Gathering data and market information from members to provide broader insights into the European pastry and baked goods market, and to inform future studies and public affairs activities. The original

market research for 2020 was planned to give a more in-depth and qualitative understanding of what drives consumers to buy sweet and savoury pastries. By March 2020, this plan was side-lined by the emerging need for insights into how the COVID-19 pandemic has impacted and will continue to impact the bakery industry across all value chains.

5. Implementing a monthly newsletter for Fedima's members, with the objective of communicating the principal activities of the association in a light and engaging manner, as well as highlighting the meetings and events in the following month. Through this newsletter, Fedima aims to encourage a greater exchange of ideas and best practices among members, building upon horizontal communication across the association.

6. Cultivating relevant media relations in order to increase Fedima's digital footprint on the key policy and industry issues for the sector. Fedima's Secretary General has been featured and quoted in [BakeryandSnacks](#) several times in the past months, as well as joining its Editorial Advisory board.





OUR MEMBERS

1 ABIM

Association of Bakery Ingredient
Manufacturers
UK & Northern Ireland
www.abim.org.uk
President: Mr. David Amos
Secretary General: Ms. Nathalie Verner

2 ANCIPA

Associação Nacional de Comerciantes e
Industriais de Produtos Alimentares
Portugal
www.ancipa.pt
Secretary General: Ms. Angela Pécurto

3 ARGE

Verband der Backmittelindustrie
Austria
President: Ms Eva Pfahnl
Secretary General: Ms. Christina Nowak

4 ASPRIME

Asociación Española de Fabricantes de
Materias Primas y Majorantes para las
Industrias de Panadería, Pastelería y Similares
Spain
www.asprime.es
President: Mr. Jorge Grande
Secretary General: Mr. Augustín Roque

5 ASSITOL-AIBI

Gruppo Prodotti e semilavorati per
Panificazione e Pasticceria dell'Associazione
Italiana dell'Industria Olearia
Italy
www.assitol.it
President: Mr. Marcello Del Ferraro
Secretary General: Mr. Andrea Carrassi

6 BZV

Der Backzutatenverband
Germany
www.backzutatenverband.de / www.wissensforum-backwaren.de
President: Mr. Wilko Quante
Secretary General: Mr. Christof Crone

7 FEDIMA HELLAS

Association of the Raw Materials and
Improvers Companies for the Bakery and
Confectionery Trades in Greece
Greece
Secretary General: Mr. Antonis Salevourakis

8 FEDIMA POLSKA

Poland
Secretary General: Mr. Filip Kwiatkowski

9 FEDIMA ROMANIA

Romania
www.fedima.ro
President: Manuela Banu
Secretary General: Ms. Nela Dragomir

10 GIDABIL

Association of Food Ingredients & Improvers
Manufacturers
Turkey
www.gidabil.org.tr
Secretary General: Ms. Canan Elibollar

11 NEBAFA

Vereniging van Nederlandse Fabrikanten van
Bakkerijgrondstoffen
The Netherlands
www.nebafa.nl
Secretary General: Mr. Peter Rijnhout

12 SYFAB

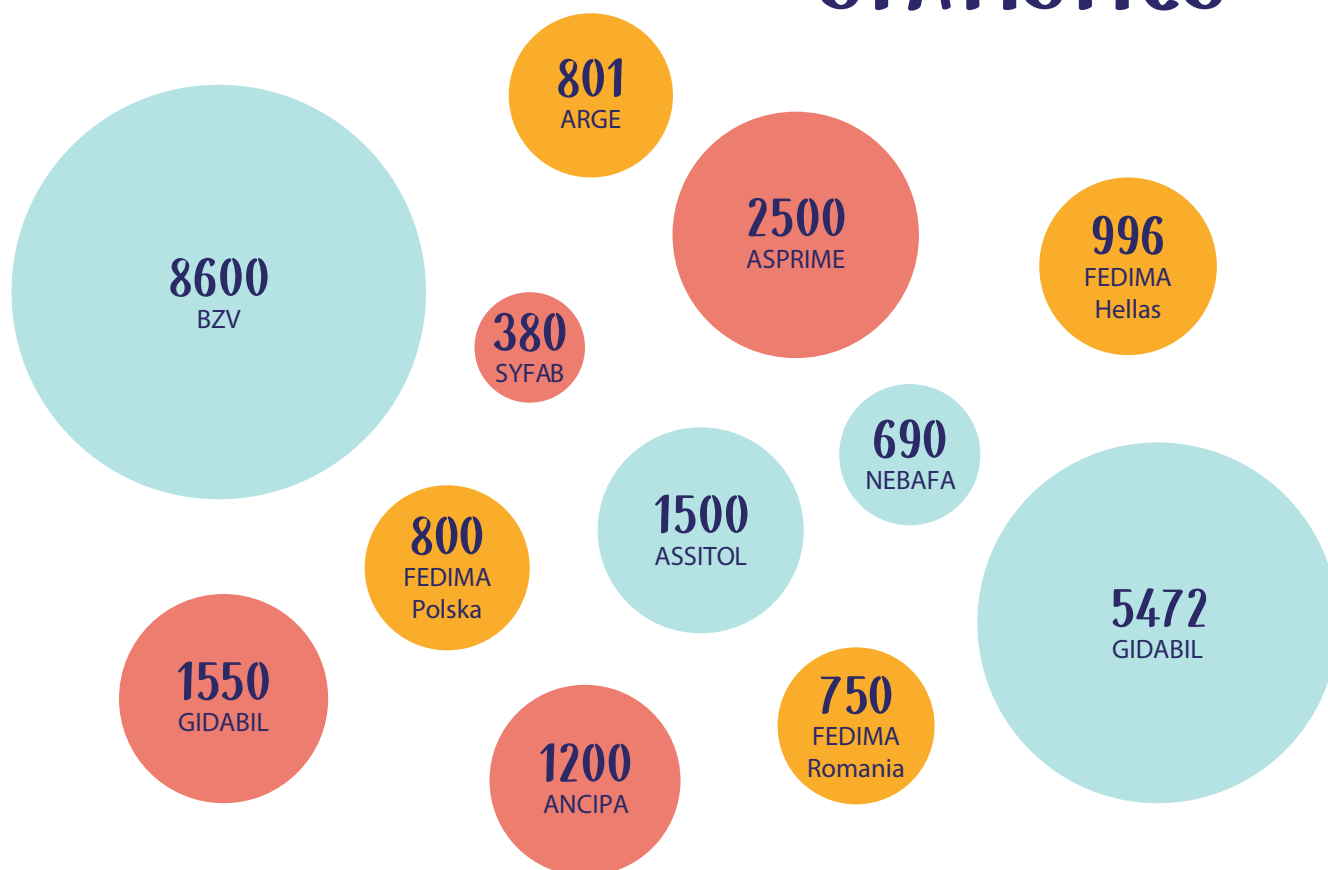
Syndicat National des Fabricants de Produits
Intermédiaires pour Boulangerie, Pâtisserie et
Biscuiterie
France
www.syfab.fr
Secretary General: Mr. Hubert Bocquelet

13 UNIFA

Union des Fabricants et Importateurs de
Matières Premières pour la Boulangerie,
Pâtisserie et Glacerie
Belgium
www.unifa.be
President: Mr. Julien Lahaye
Secretary General: Mr. Jean Christophe Kremer



STATISTICS



Numbers of employees represented by Fedima

The companies we represent generate a turnover of over

5.2
billion EUR per year,

hence contributing to the economic development of European countries.

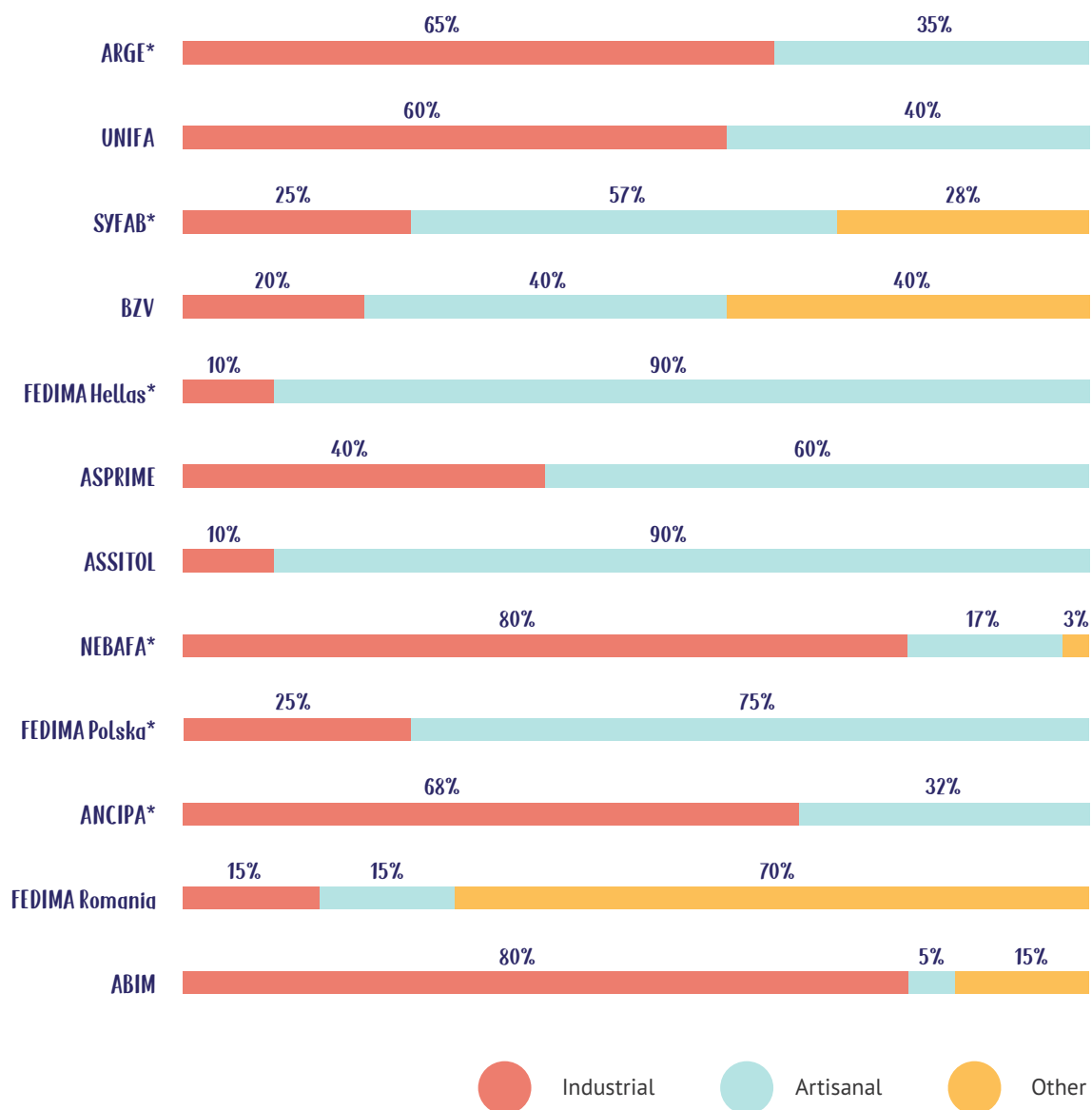
Overall, companies represented by our members employ nearly

24,000
people across Europe.

Turnover generated by companies represented by FEDIMA (EUR billion)

FEDIMA	5.2
BZV	1.6
GIDABIL	0.6
ABIM	0.5*
SYFAB	0.3*
NEBAFA	0.3*
ARGE	>0.1
UNIFA	<0.2*
ANCIPA	<0.2
ASSITOL	>0.1
FEDIMA Hellas	>0.1
FEDIMARomania	0.1
ASPRIME	N.A.
FEDIMA Polska	<1.1

* 2018 data



Market share by type of bakery (%)
 GIDABIL: N.A. * 2018 data

The type of bakeries represented by our members largely vary between national associations. While our Dutch, Austrian, Belgian and British associations represent **over 60% industrial bakeries**, the Italian, Greek and Polish associations mostly account for artisanal bakeries.

The German association represents various types of bakeries, including artisanal and industrial bakeries, which account **for 60% of their total membership**.

FEDIMA BOARD MEMBERS

A Board is elected for a 2-year period. New elections will take place in 2021.

- **Johan SANDERS** President
Dawn Foods
- **Enric VALLS** Vice-President
PURATOS
- **Marc CUYPERS** Treasurer
Zeelandia
- **David AMOS**
ABIM (UK)
- **Hervé BOLZE**
Lesaffre International
- **Christof CRONE**
Der Backzutatenverband (Germany)
- **Christophe DUCHEZ**
SYFAB (FR)
- **Wolfgang MEYER**
Backaldrin
- **Andrew POLLARD**
AB Mauri
- **Christian SKULTE**
ASSITOL (Italy)
- **Peter VERHAGEN**
NEBAFA (NL)



COMMITTEE MEMBERS AND SECRETARIAT

TECHNICAL COMMITTEE

Chair: Gilles MORELLE (*Puratos*)

There are 5 active Expert Groups (EGs):

- **EG Additives**
Chair: Mark VAN MULDER (*Puratos*)
- **EG Enzymes**
Chair: Evelien AGACHE (*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*).

MARKETING & COMMUNICATIONS COMMITTEE

Chair: Thomas LESAFFRE (*Lesaffre*)

Bora AKIN (*Puratos*)
Sofia BARBOSA (*AB Mauri*)
Igor CALDERARI (*ASSITOL*)
Kris DIERCKX (*Zeelandia*)
Wendy KAMPS (*Dawn Foods*)
Sandrine LE BAUD (*CSM Bakery Solutions*)
Etienne MAILLARD (*Lesaffre*)
Wolfgang MAYER (*Backaldrin*)
Katia MOUVET (*Puratos*)
Anke NIJHUIS (*AB Mauri*)
Nanno PALTE (*Puratos*)
Indika PATHIRATHNA (*ABIM*)
Maarten VAN DER HEIJDEN (*Zeelandia*)
Enric VALLS (*Puratos*)
Etienne VERHOEF (*Sonneveld*)

SUSTAINABILITY COMMITTEE

Chair: Jean Philippe MICHAUX (*Puratos*)

Birgit BUCHER (*CSM*)
Rik KUIS (*Dawn Foods*)
Laurent MAITENAZ (*Lesaffre*)
Osman PARLAK (*Gidabil*)
Carlotta TRUCILLO (*ASSITOL*)
Gerlof VAN HOEK (*Zeelandia*)
Peter WEEGELS (*Sonneveld Group BV*)

SECRETARIAT

Dirk VAN HAM, Secretary General
Isabelle DE VINCK, Association Manager
Agathe VAN DE PLASSCHE, Programme & Communication Manager
Michela BISONNI, Policy Officer
Meave COSGROVE, Communication & Press Officer
Louis LOSTIS, Sustainability Officer





**Federation of the European Manufacturers
and Suppliers of ingredients to the Bakery,
Confectionery and Patisserie Industries ASBL**

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EU Transparency register : 904362515084-73