



fedima



ANNUAL REPORT 2018

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

FOREWORD



Johan SANDERS
PRESIDENT

DEAR MEMBERS,

DEAR READER,

The publication of our Annual Report provides an opportunity for our stakeholders to understand our sector, our priorities as a federation and how we function.

Elected in 2017, I am honoured to introduce to you this Annual Report.

Fedima has changed significantly over the last five years and we redefined our strategic objectives. We operate in a more comprehensive structure and have expanded our activities to areas like market knowledge and promotion of bakery and pastry goods. I want to thank my predecessor, Sofia Barbosa, for leading us through this process. Being the European bakery ingredients platform, Fedima aims to support and grow the bread and pastry market by shaping a favourable environment to ensure a sustainable and innovative bakery sector.

Under my first year as President, the Board has developed a concrete action plan with clear deliverables. The activities are supported by many dedicated members who contribute to our committees and expert groups. I am now proud to present you the first results in this report. A trade association looks long term and I have complete confidence that Fedima's national associations and secretariat, thanks to their commitment and expertise, will contribute successfully to the achievement of our goals and ambitions in being the leading European bakery ingredients platform.

Looking ahead, 2019 will be an interesting year! We will celebrate Fedima's 50th anniversary whilst EU citizens will vote for a new European Parliament. A new European Commission will be installed. We want to take this opportunity to bring a strong message for the future of our sector. It will be a time for reflecting on where we are but also to look forward!

Thank you for your interest in our federation!

Johan Sanders
President

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1

FEDIMA IN A NUTSHELL



200
COMPANIES



13
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 13 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 provide business information
- 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 new 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 and Communications Committee, which report to the Board. An advisory role is taken by the Secretaries-General Committee and by the Advisory Committee.



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OUR STRUCTURE



The General Assembly is composed of all 13 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.

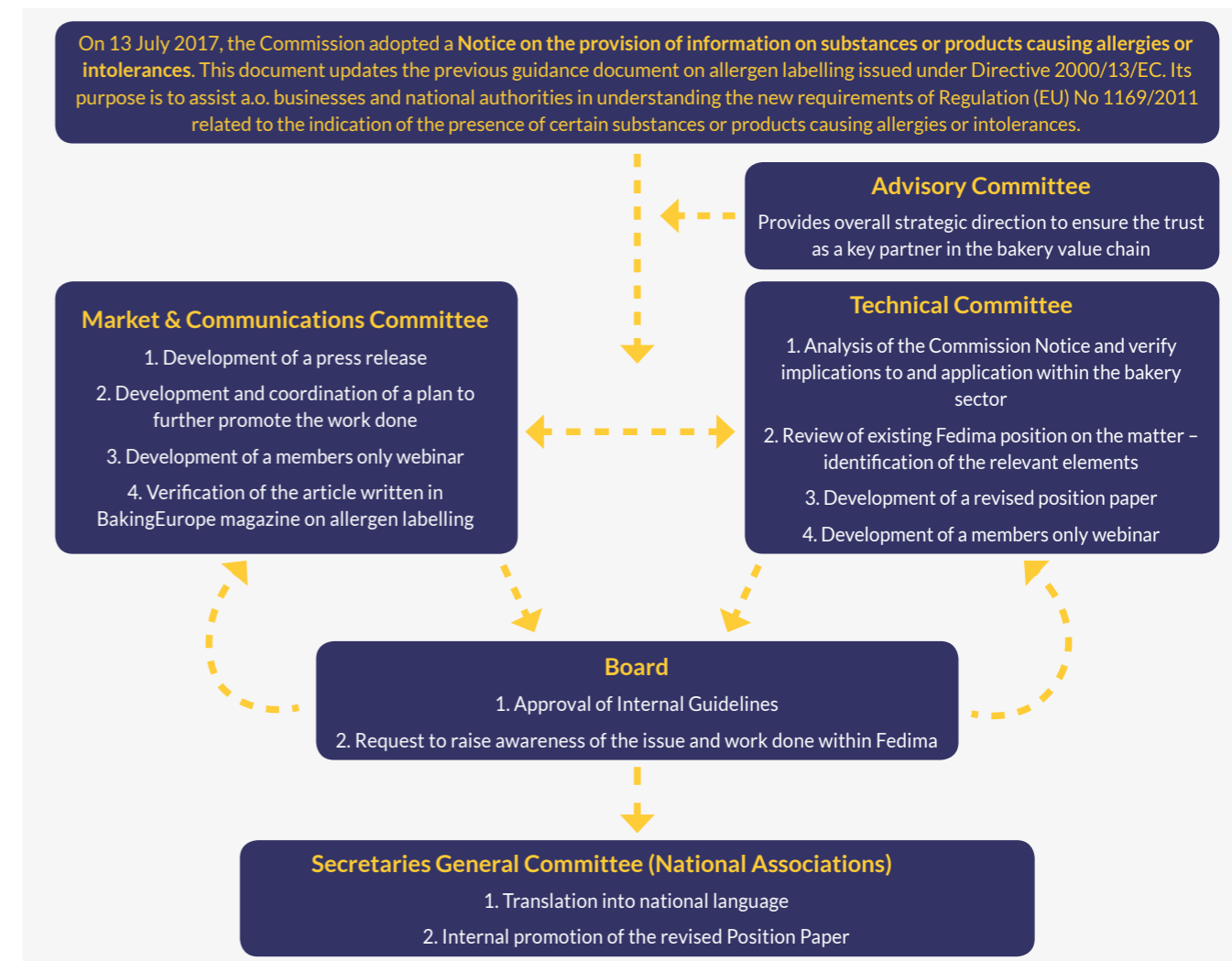
The Advisory Committee consists of CEOs of companies of the industry which are, throughout its subsidiarity, represented by at least one third of the full members. The Advisory Committee advises the Board on the definition of the strategic objectives of the association.

The Technical Committee is composed of experts delegated by the members. 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 for the daily management of the association in Brussels.

Below you can find a flowchart which illustrates the activities and interactions between Fedima bodies on a specific case study of Allergen Labelling



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

Ernst ERHARDT
Zeelandia
Vice-President

Christian VAN STRYDONCK
UNIFA (Belgium)
Treasurer

Christian SKULTE
ASSITOL (Italy)

Christof CRONE
Der Backzutatenverband (Germany)

Eric SCHUBERT
SYFAB (France)

Erik Würtz KNUDSEN
UNIMA (Denmark)

Sofia BARBOSA
AB Mauri

Wolfgang MAYER
Backaldrin

Hervé BOLZE
Lesaffre International

Enric VALLS
Puratos

Secretariat: Jean Christophe KREMER

TECHNICAL COMMITTEE

Chair: Gilles MORELLE

Secretariat: Nuria MORENO ODERO
and Marian BRESTOVANSKY

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

Secretariat: Marian BRESTOVANSKY (Market)
and Milan PAZICKY (Communications)



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FEDIMA'S 4 AREAS OF ACTIVITIES

INFORMED CUSTOMERS
& CONSUMERS



FOOD SAFETY



OCCUPATIONAL HEALTH
& SAFETY



BAKERY INDUSTRY
PROMOTION





INFORMED CUSTOMERS & CONSUMERS

Transparency on products and processes towards customers and consumers is one of the federation'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 transparency.

ALLERGEN LABELLING

Our members aim to provide accurate technical information and product labelling to their customers. Appropriate information to customers on the presence of allergens allows sensitive consumers to make an informed choice on what is safe for them. Fedima published an updated position paper on the labelling of allergens in March 2018. This publication was supported by a webinar organised for members to present the content of the paper and answer questions.

EU Regulation 1169/2011 on the provision of food information to consumers (FIC) requires all allergens listed in Annex II of this Regulation to be labelled on consumer products, including the allergens present through the use of processing aids. In 2017, the European Commission published a Commission Notice relating to the provision of information on substances or products causing allergies or intolerances, which gives guidance on the labelling of allergens in the context of the FIC regulation. Currently, there is no harmonized approach across Europe for precautionary allergen labelling (PAL) regarding the potential presence of allergens

due to cross contamination. However, we observe that the VITAL 2.0 risk assessment method is increasingly recognised by national authorities.

As manufacturers and suppliers of food ingredients, Fedima members commit to provide their customers the required allergen labelling information on the product label and/or on the product information sheet, according to the FIC regulation. Although there's no harmonized European approach on risk assessment with regards to allergen cross contamination, Fedima members will also provide information on the potential presence of allergens due to cross contamination.

ORIGIN LABELLING

Since Europe decided not to further regulate mandatory origin labelling for some ingredients or foods, multiple initiatives in various countries have risen. Currently, around 10 Member States have developed measures, including Austria, Spain, France, Romania, Belgium and Italy. So far, most of the proposed measures apply to dairy or meat products. Fedima joins FoodDrinkEurope in stating that these initiatives are protective and against the further harmonisation of the single market. As the first 'experimental' measures are coming to an end, the national authorities will prepare implementation reports. Based on these reports, it will be decided whether to maintain the national measures or not. Furthermore, a more general debate on origin labelling may be re-opened at EU level once the first reports are submitted.

With regards to rules on voluntary origin labelling, the EU did ensure harmonisation in order to secure fair competition whilst protecting the internal market. The new Regulation (EU) 2018/775 sets out rules for

indicating the country of origin or place of provenance of the primary ingredient of a food when a food business operator voluntarily chooses to mention the origin of his food product. It entered into force on 1 June 2018, and will apply as of 1 April 2020, thereby making the national measures on voluntary origin labelling to date invalid.

DEFINITION OF WHOLE

GRAIN FOODS

The Health Grain Forum – a network of universities, institutes and industries – is working towards an EU-wide definition of whole grain. After consultation of grain-bread related European associations and FoodDrinkEurope, the Forum has published its agreed definition in July 2017. The proposed definition recommends that a food may be labelled as 'whole grain' if it contains at least 30% whole-grain ingredients in the overall product and more whole grain than refined grain, both on a dry weight basis. However, we also observe that whole meal bread is often regulated as a bread with 100% whole meal flour.

While the definition currently remains a guide and labelling of whole grain products remains diverse throughout Europe, Fedima and other involved industries are expecting to apply the rule in its future activities relating to food and nutrition guidelines.





FOOD SAFETY

Food safety are priorities for all consumers, governments and food manufacturers. They are the cornerstone of European legislation in the field of consumer protection. Consequently, it requires all attention. 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 scientific 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 also associated with the pleasure of eating.

ADDITIVES

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 2018, EFSA published 99 scientific opinions on the re-evaluation of the safety of food additives, covering 169 individual food additives. There are still 147 food additives to be re-evaluated by EFSA before 31 December 2020.

Furthermore, a guidance on the carry-over principle is expected to be published by the European Commission later this year.

ENZYMES

Enzymes are naturally-occurring proteins that enhance biochemical reactions. They can be obtained by extraction from plants, animals or by fermentation from micro-organisms. 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.

ACRYLAMIDE

Concerns over the presence of acrylamide in food dates back to 2002. The food industry, in close cooperation with national authorities and the European Commission, has developed a Code of Practice as well as a Toolbox to highlight ways to lower levels of acrylamide in food.

After a long period of deliberation, a Commission Regulation (EU) 2017/2158 on mitigation measures and benchmarks levels for the reduction of the presence of acrylamide in food entered into force in December 2017 with a transition period of four months. This period finished on 11 April 2018. 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.

In addition, the European Commission has adopted a guidance document for FBOs on the application of the legislation, to which Fedima contributed.

The Commission also plans to undertake awareness campaigns for both consumers and the food industry. 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.

On acrylamide, Fedima is in close contact with AIBI.





OCCUPATIONAL HEALTH & SAFETY

The 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 (AFES WG). We continue to explore other possible areas where we could play an active role in guaranteeing the highest level of workers' safety.



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 the handling of sourdough by professionals.

In this context Fedima recognizes the need for clarification of sourdough concerning its status of being hazardous. Fedima is collaborating with FoBIG, European Institute for Research and Consulting on Hazardous Substances, in a project in order 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 harmonized market, which is not fully the case today.

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 are, 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 is developing awareness on the issue of enzyme safety in the bakery industry, mainly on dust management. An important milestone this year was the publication of an industry guidance document on the safe use 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. Readers will get an overview of the steps that should be taken to mitigate the risks in all sectors of the baking industry; from milling and bakery ingredient production, to craft and industrial bakeries.

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 dust formation. 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 supporting materials to ensure the highest level of safety of workers.



BAKERY INDUSTRY 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 bread promotion 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 bread in Europe.

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 industrial 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, Fedima together with AIBI organized a Symposium on "Bread Promotion Activities in Europe" in April this year. The event brought together over 50 partners in the bakery sector. It was a day dedicated to learning about the importance of bread, its promotion opportunities and sharing best practices.

The bakery sector represents a considerable economic weight in Europe. The main idea is to leverage bread and bakery products by using the new 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. They managed to look at three different markets (Flanders, Wallonia and Netherlands) and find similar bread values by focusing on its tasty, nutritious and versatile characteristics and cultural heritage. This is only one of the examples of different promotion activities that are or were active. Campaigns were conducted in different countries such as Slovenia and Sweden



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FEDIMA'S OUTLOOK 2019



In 2019, Fedima will celebrate its 50th anniversary. This is not only a moment to celebrate the achievements of our federation over the last years, but also the opportunity to look at the future of our bakery and patisserie industry. We aim to reconfirm the importance of the role of our association in promoting the bakery image and reputation towards customers and consumers.

Fedima's ambition in 2019 is to further focus on enhancing the association's overall communication. After the successful launch of the newly designed website in September 2018, Fedima will continue improving visibility and communication around key priorities and will enhance the content of the website with more material about the role of our industry and the bakery intermediate food ingredients, bakery market trends, researches and upcoming regulations and legislations, being the point of reference in the European bakery and patisserie Industry.

Food enzymes will be one of the key topics to be addressed within our association in the short term. In the light of the establishment of a Union list of approved food enzymes. In particular, EFSA is currently assessing all food enzymes including those used in bakery wares. Fedima monitors the EFSA assessments and verifies potential impact on enzymes labelling.




Market data collection will be another mile-stone achievement we aim to complete in 2019. In order to support Fedima statements and positions with relevant data and to have better insights into the bakery and patisserie market, the members decided to launch an internal collection of statistics in 2018. The collection exercise will give members an aggregated view on the market and will allow Fedima to use the data and apply to EU funding programmes for relevant initiatives.



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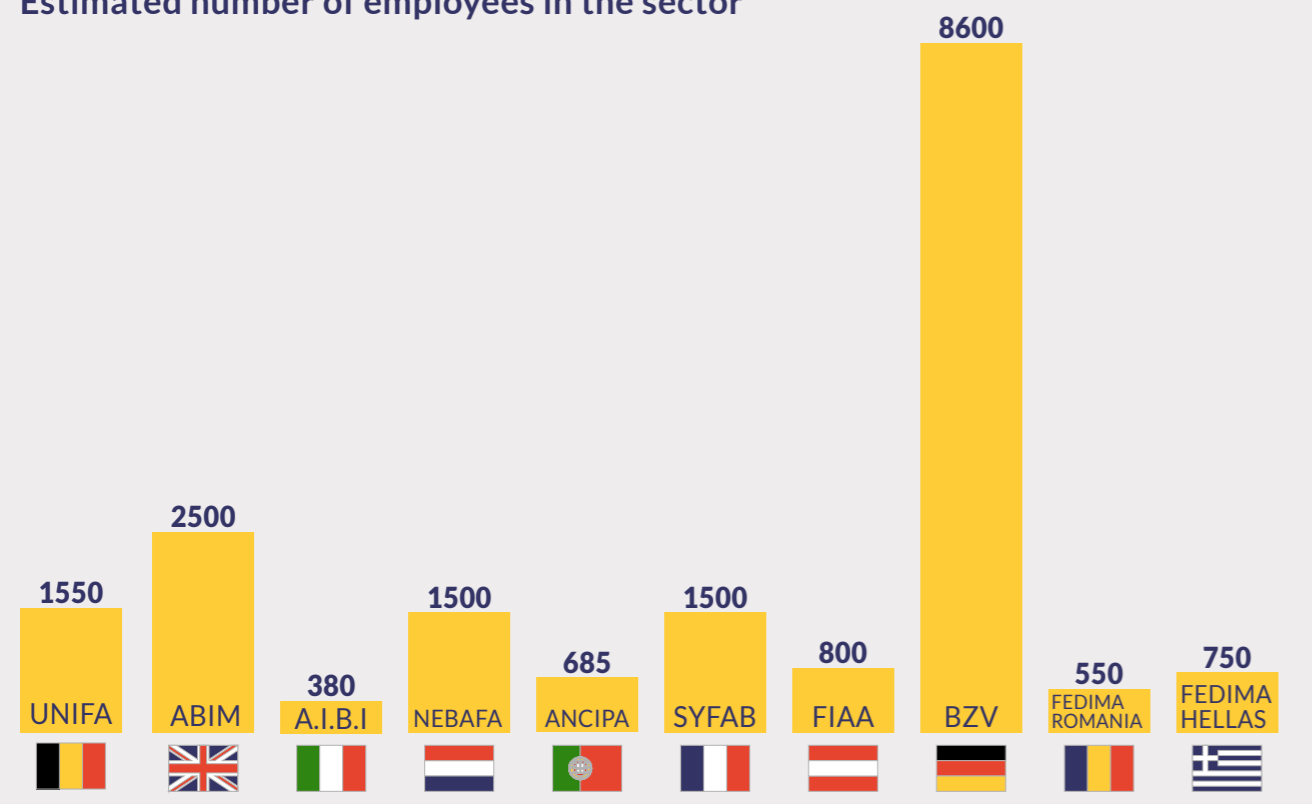
OUR NATIONAL ASSOCIATIONS & STATISTICS



	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. Andrew Pollard	Mr. Filip Kwiatkowski
Secretary-General	Mr. Jean Christophe Kremer	Ms. Elena Fakou	Mrs. Sylwia Zapolska- Szczesniak
Website	www.unifa.be	www.abim.org.uk	
Number of Members	9	13	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) 207 863 2460	+48 (22) 853 36 81
Fax	+32 2 761 16 99	none	+48 22 84 70 679
E-mail	info@unifa.be	abim@fdf.org.uk	s.zapolska@lesaffre.com
Delegate to the Technical Committee	Mr. Jos Smulders	Mr. Richard Hall Ms. Elena Fakou	

	A.I.B.I. Italy 	ANCIPA Portugal 	NEBAFA Netherlands 
Name	Gruppo Prodotti e semilavorati per Panificazione e Pasticceria dell' Associazione Italiana dell'In- dustria 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
Website	www.assitol.it	www.ancipa.pt	www.nebafa.nl
Number of Members	19	8	17
Address	Piazza di Campitelli 3, I-00186 Roma, Italy	Largo S. Sebastiao da Pedreira 31, 4 th floor, PT-1050-205 Lisboa, Portugal	Postbus 96949, 2509 JH Den Haag
Telephone	+39 06 69 94 00 58	+351 21 352 88 03	+31 70 336 52 71
Fax	+39 06 69 01 18	+351 21 315 46 65	+31 70 336 52 73
E-mail	assitol@assitol.it	xavierpires@ancipa.pt	info@nebafa.nl
Delegate to the Technical Committee	Mr. Massimo Fusari Mr. Igor Calderari		Mr. Peter Weegels (chairman EG contaminants) Mrs. Mirjam Kerckhaert Mr. Maarten Boonstra Mrs. Marlene Bijlsma

Estimated number of employees in the sector



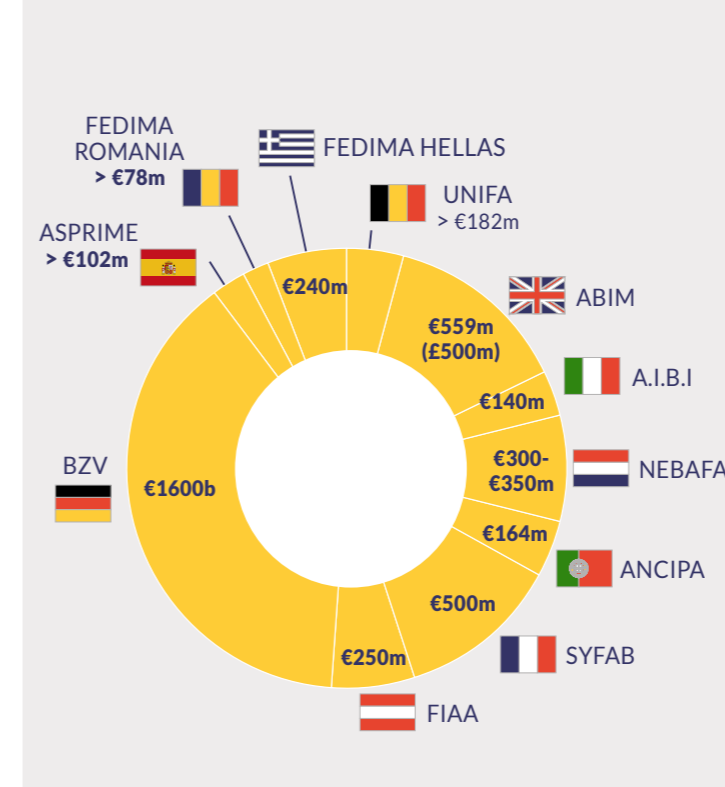
 FEDIMA POLSKA = N/A

 ASPRIME = N/A

 UNIMA = N/A

Source: collected by Fedima secretariat from member associations

Turnover domestic market



 UNIMA = N/A

 FEDIMA POLSKA = N/A

Source: collected by Fedima secretariat from member associations

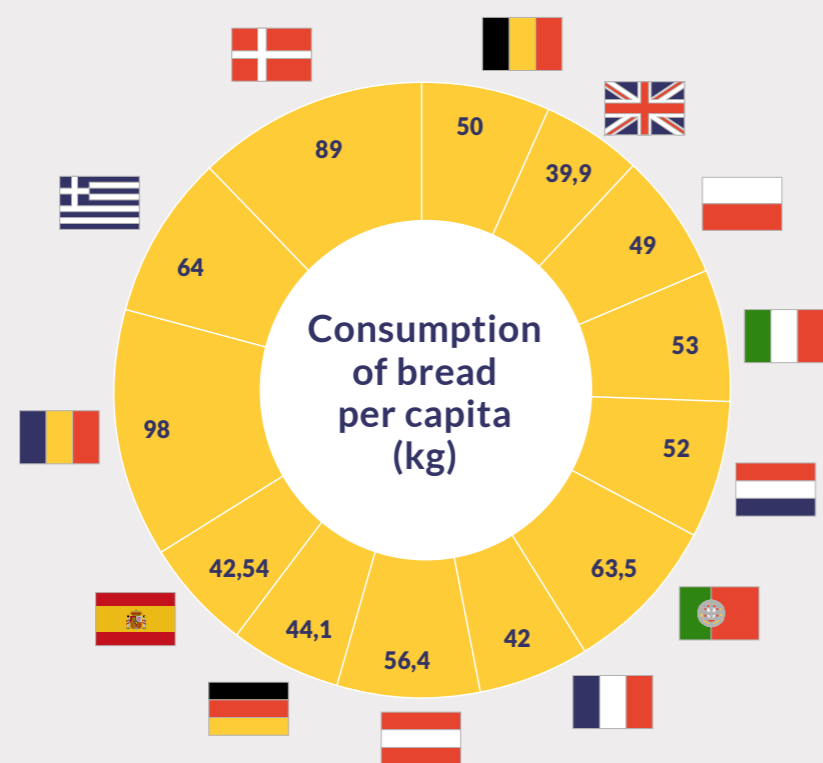
UNIMA Denmark

Name	Forening af Producenter af Raavarer og Hjaelpemidler til Bageri, Konditori og Beslaegtede Virksomheder i Danmark (UNIMA)
Chairman	Mr. Erik Würtz Knudsen
Secretary-General	Mr. Erik Würtz Knudsen a.i.
Website	
Number of Members	15
Address	Mollegade 12, DK-7100 Vejle Denmark
Telephone	+45 9 41 54 15
Fax	+45 9 41 54 19
E-mail	ewk@erikwurtzknudsen.dk
Delegate to the Technical Committee	Mr. Jan Poulsen

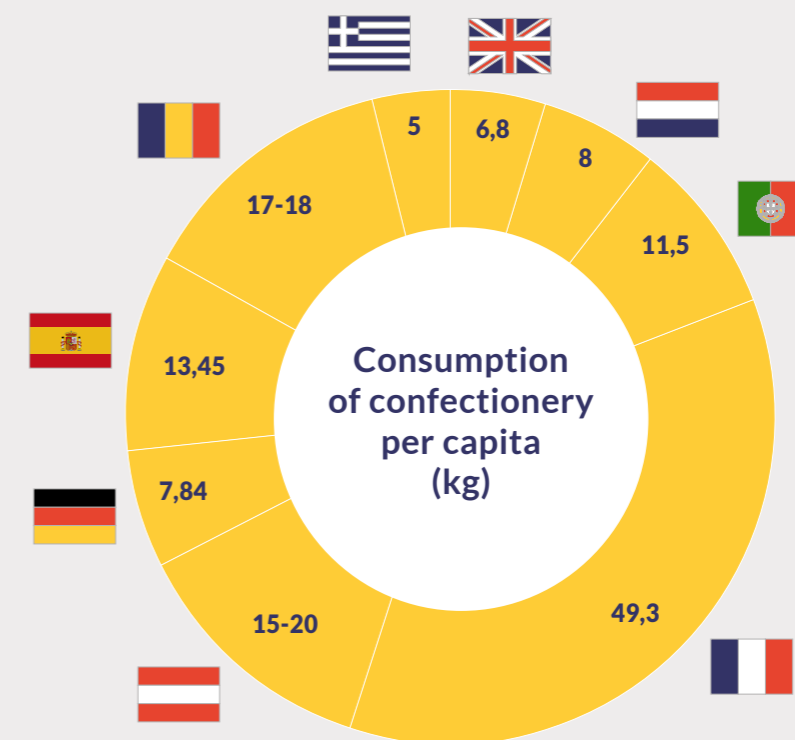
	SYFAB France 	FIAA Austria 	BZV Germany 
Name	Syndicat National des Fabricants de Produits Inter- médiaires pour Boulangerie, Pâtisserie et Biscuiterie (SYFAB)	Fachverband der Lebensmittelindustrie (FIAA)	Der Backzutatenverband e.V.
Chairman	Mr. Eric Schubert	Mrs. Eva Pfahnl	Dr. Detlev Krüger
Secretary-General	Mr. Hubert Bocquet	Ms. Lisa Jöchlinger (from 3 rd September 2018)	Mr. Christof Crone
Website	www.syfab.fr	www.dielebensmittel.at	www.backzutatenverband.de www.wissensforum-backwaren.de
Number of Members	22	7	40 + 6 (Austria)
Address	66 rue la Boétie, 75008 Paris, France	Zaunergasse 1-3, A-1030 Wien, Austria	Neustädtische Kirchstrasse 7A 10117 Berlin, Germany
Telephone	+33 1 82 73 00 68	+43 1 712 21 21 - 26	+49 30 68 07 22 310
Fax		+43 1 712 21 21 - 35	+49 30 68 07 22 319
E-mail	syfab@66laboetie.fr	ljoehlinger@dielebensmittel.at	info@backzutatenverband.de
Delegate to the Technical Committee	Mrs. Catherine Peigny, Mrs. Elodie Rubio, Ms. Blanche Scherer		Mrs. Carine Chincholle

	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	Ms. Marie-Cécile Perchereau / Ramón Trias	Ms. Manuela Banu	Mr. Yiannikas Stelios
Secretary-General	Mr. Agustín Roqué		Mrs. Maria Myridaki
Website	www.asprime.es	www.Fedima.ro	
Number of Members	9	6	11
Address	Mallorca, 286 - entlo 2º, E-08037 Barcelona, Spain	Strada Cristea Mateescu 2, bloc 35, scara 2, apt 57 023667 Bucuresti sector 2, Romania	Terma Artemidos Str., GR-14452 Metamorfosis-Athens, Greece
Telephone	+34 93 207 25 16	+40 21 252 2113/1131	+30 210 28 46 036/38
Fax	+34 93 207 16 11	+40 21 243 44 00	+30 210 28 44 863
E-mail	aroque@grupobonmacor.com		mmyridaki@hotmail.com
Delegate to the Technical Committee	Mrs. Clara Sunyol	Ms. Roxana Varlan	Mr. Leonidas Kalavritinos

THE BREAD AND PASTRY MARKET



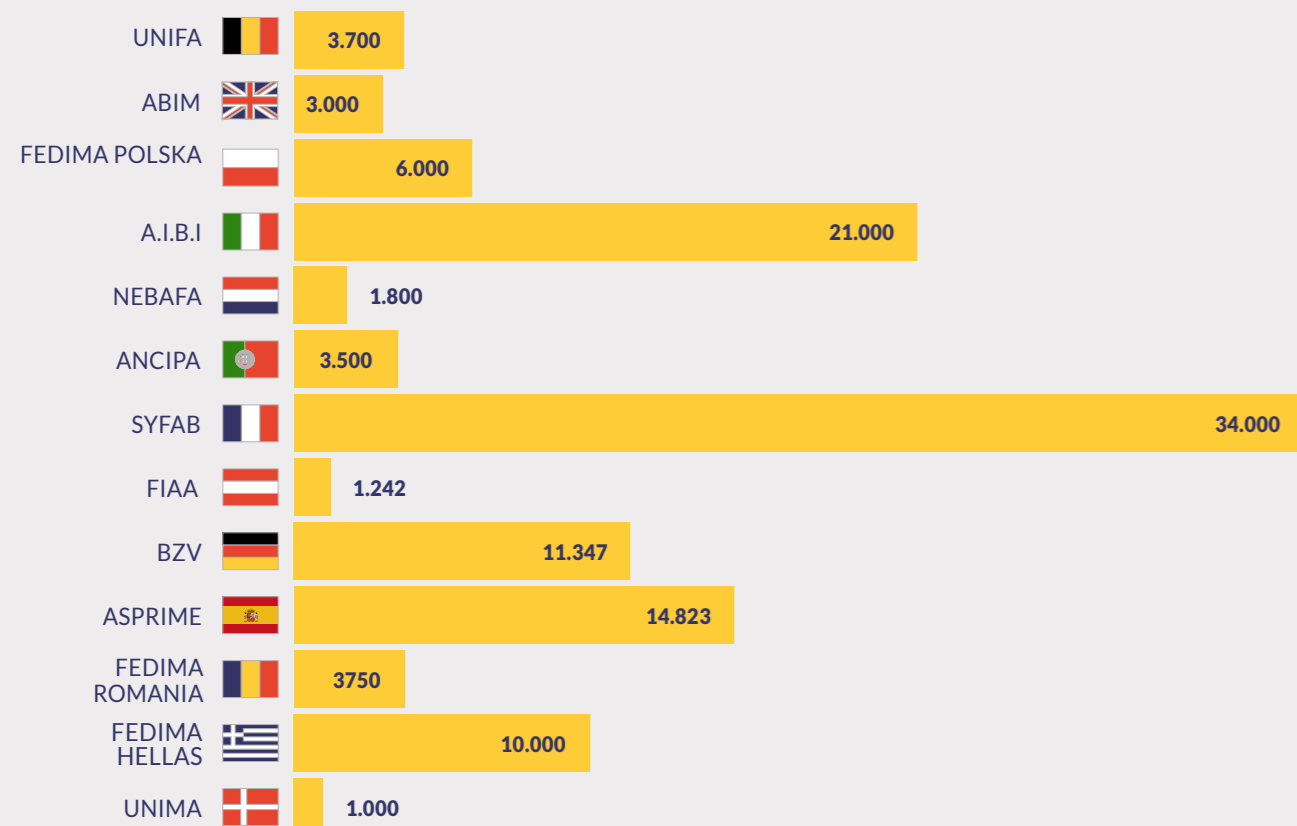
Source: collected by Fedima secretariat from member associations



 UNIFA = N/A  A.I.B.I.= N/A  FEDIMA POLSKA = N/A  UNIMA= N/A

Source: collected by Fedima secretariat from member associations

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	+/- 47.3% in value	+/- 25 (excl. chocolates and biscuits bakeries)	+/- 52,7% in value
ABIM	5	60	80
FEDIMA POLSKA	60	50	5-10
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
UNIMA	20	+/- 50	68
FIAA	35	2	65

Source: collected by Fedima secretariat from member associations





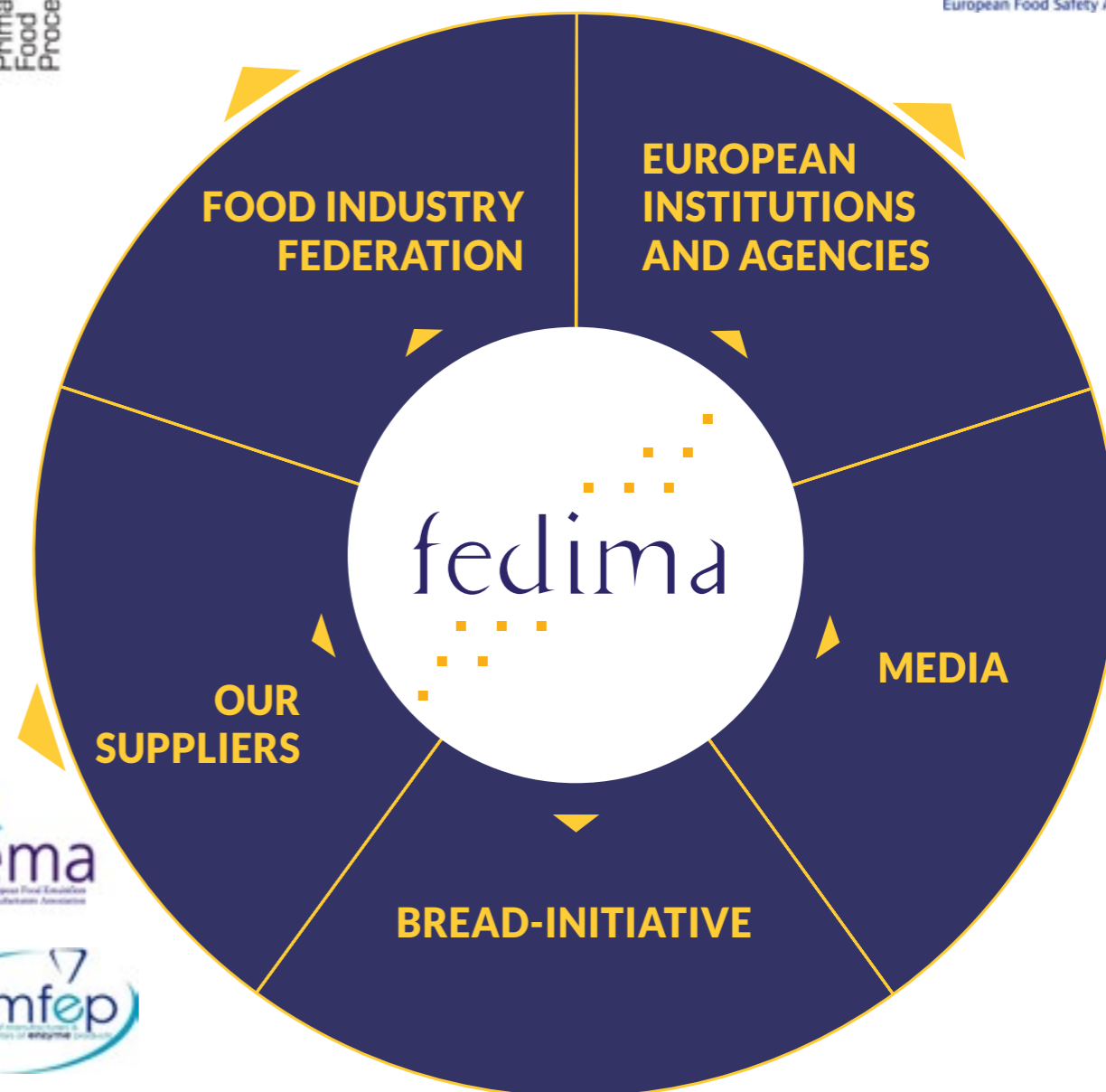
OUR NETWORK

Fedima is an industry association 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 the FoodDrinkEurope on bread and baked goods matters. Furthermore, a joint working group is 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.





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Fedima is registered in the European
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904362515084-73