



EUROPEAN DAIRY ASSOCIATION



Annual Report 2016/17

connect to the world of dairy



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More than **12,000** production sites across Europe

More than **300,000** direct jobs on milk processing sites

World dairy leaders
5 of the top 10 global dairy companies are European

Balanced & Successful
coexistence of cooperative model and private ownership

Around **50%** of milk collected in Europe by coops

The economic power of European dairy at a glance

Partnering
around **700,000** dairy farms across Europe

Positive EU trade balance
The European milk processing industry brings more than **10 billion €** to the overall EU trade balance

A rich and tasty cultural heritage
of more than **300** registered cheeses and dairy products

European recommendations of dairy consumption is 3 servings (for adults)

1 serving :
200 ml of milk
125 grams of yoghurt
20-30 grams of cheese

Foreword

In 2016, we placed the key topics for the future of the dairy sector in the centre of our European Dairy Ambition.

Next to the development of ideas for the **CAP post 2020** and to our commitment to support the **European trade policies**, we made huge progress on our **sustainability agenda**. Indeed, our strong focus and common effort on a wide range of sustainability topics bore fruit: we are recognized as one of the most committed industries in that field, actively driving the topics. This is an important step towards the right recognition of our products both by the markets and in legislation. Our 2016 **EDA Dairy Policy Conference** focussed on “*Sustainability – Food, Diet, Dairy*” and is a perfect example to illustrate our successful sustainability work.

We are the voice of the exceptional nutritional and health value of milk and dairy in Brussels. Our **Roundtable in the European Parliament** on ‘**Dairy Nutrition and Health**’, but also the **EDA Scientific Advisory Board Dairy Nutrition and Health** are two major driving forces for making our positions known and for sharing information on the nutritional value and the health benefits of milk and dairy in Brussels and beyond.

2016 has been a challenging year for the European Union in general and for the dairy sector in particular. Political changes, be it at European but also at global level seem to affect the very principle of unity. For our sector, a more than complicated market situation and the threats to the single market requested our attention all over the year 2016 and we addressed all these issues with the expertise and commitment of our ‘Trade and Economics’ and ‘Food, Environment and Health’ departments.

At our annual convention and the **European Dairy Platform 2016** in Nice we shaped the future direction of our sector together with more than 200 dairy executives and experts and with EU Commissioner Phil Hogan as our key note speaker.

We continuously analysed the market situation and accompanied the European decision making process at all levels and at all stages. We have shown that we are a valuable partner in the European decision making process and that our voice is of major

importance in the discussions on the future of Europe’s agriculture: **food production, rurality and natural resources**. In 2016, but especially in 2017 when we will celebrate the 60th birthday of the Treaty of Rome, we remember the starting point of the **Common Agricultural Policy** as a fundament of our Union and we will more than ever underline the core principles of the European Union, among which the **Single Market**.

In 2017, we will move on in achieving our vision. In times when the Union seems to lose its popular appeal in many parts of the Union, we will continue to focus on defending the values of the European Union and the principles of the single market and while doing so, we can count on the precious support of our members, the national dairy federations as well as of the milk and dairy processing companies, cooperatives and private owned dairies across Europe.

We are proud of being able to count also on SMZ, the Slovak Dairy Association, our new EDA member and therefore, more than ever, in 2017 we are ready for **European Dairy Action**.

Vive l’Europe et vive le lait



Alexander Anton
EDA Secretary General



Michel Nalet
EDA President

Brussels, February 2017



Connect to the world of dairy

We want EDA, our European trade association to be a truly European platform for both,

- high level debates on the future of our sector and
- in depth analysis of the dairy related dossiers at EU level.

That's why the content of the work in our EDA Food, Environment and Health Policy Desk and in our EDA Trade & Economics Desk is of crucial importance.

And we defined and strengthened another pillar: we want our input to be relevant in Brussels and beyond.

It is our day to day challenge to link both pillars:

- trustworthy and well thought positions and input on the content level on the one hand and
- sharing our work at Brussels level and beyond on the other hand at the right moment with the right people through the right channels.



EDA Board meeting with EU Commissioner Phil Hogan in the François-Xavier Ortoli hall of the Berlaymont building in Brussels, July 2016



At our EDA Annual Convention in Nice in December 2016, EU Commissioner Phil Hogan discussed with Elli Siltala (Valio, FI), Peder Tuborgh (Arlafoods, DK), Daniel Jaouen (Lactalis, FR) and Peter Stahl (Hochland, DE). This session was moderated by Ms Rose O'Donovan (editor in chief agrafacts).



EDA chair Michel Nalet and his EDA Board colleagues Riitta Brandt (Valio, FI) and Jonas Carlberg (LRF, SE) met with EU Commissioner for Trade, Ms Cecilia Malmström in September 2016 in Brussels



EDA vice chair Attilio Zanetti with MEP Herbert Dorfmann (EPP, IT) at our EDA Dairy Policy Conference in March 2016 in Brussels



EDA vice chair Ingo Müller (DMK) with EU Commissioner Phil Hogan at our EDA European Dairy Platform in Nice



EU Commissioner Phil Hogan with EDA chair Michel Nalet and EDA secretary general Alexander Anton





MIV president Peter Stahl, EDA chair Michel Nalet, EDA vice chair Dr Josef Schwaiger, Ronald Kers (Müllergroup), Ingo Müller, EDA vice chair



EDA chair Michel Nalet with Dr. Jens Schaps, DG AGRI, at our EDA Presidents' lunch in April 2016



EDA chair Michel Nalet in April 2016 at the IDIA Board meeting in Dublin with outgoing IDIA chair Dan MacSweeney (right) and the new IDIA president Jim Woulfe (left)



EDA chair Michel Nalet with DairyUK President Dr. David Dobbin (left) and Laurent Damiens (CEO EMF) in Belfast in April 2016



EDA chair Michel Nalet with outgoing IDF chair Jeremy Hill and the newly elected IDF president, Dr. Judith Bryans (CEO DairyUK, EDA Board member) in Rotterdam in October 2016



EDA presidium meeting at the Berliner Milchforum in March 2016 (from left to right: Claude Steinmetz (Luxlait), Jan Teplý (Madeta), EDA chair Michel Nalet and Dr. Josef Schwaiger (DMK) with our guest Kirsten Holm Svendsen (DDB)



EDA chair Michel Nalet with ASSIFONTE president Ludwig Rupp at our joint annual convention in Nice in December 2016



EDA chair Michel Nalet met in October 2016 with the outgoing president of the German dairy farmers' federation, Mr Udo Folgart and his successor, Mr Karsten Schmal (left) in Rotterdam



EDA chair Michel Nalet and the newly elected chair of the COPA COGECA Milk group, Mr Thierry Roquefeuil, met at the November 2016 meeting of the CDG MILK at DG AGRI



In May 2016, EDA sec gen Alexander Anton was invited to a meeting of the Council of the Agricultural Ministers of the South (CAS) in Puerto Varas (Chile) and to exchange with Mr Tabaré Agerre, the Minister of Agriculture of Uruguay, who holds the Presidency of Mercosur and of the CAS.





EDA sec gen Alexander Anton with the chair of Fedeleche (dairy farmers federation of Chile), Mr Horacio Hernandez in Puerto Varas (CL)



The EDA Dairy Focus on the Slovak EU Presidency was presented by Matej Hudec and his colleague Helena Lettrichova from the Slovak EU Presidency and EDA sec gen Alexander Anton in Brussels in June 2016



A tribute to outgoing COPA COGECA MILK Chair Mansel Raymond and his wife Rosalind – thank you for your dairy commitment!



The Secretary General of the Committee of the Region, Dr. Jiří Buriánek, exchanged on the importance of dairy in basically all EU regions in Brussels in July 2016



EDA sec gen Alexander Anton with the Ethiopian Minister for Industry, Dr. Mebrahtu Meles in Addis Abeba (ET) in July 2016



EDA sec gen Alexander Anton with the Australian Trade Minister Steven Ciobo in May 2016 in Brussels



The head of the agricultural department of the Israeli mission in Brussels, Mr Haim Tager (right) at an EDA visit with the Israeli Dairy Board in May 2016





EDA speeches 2016/17

At several high level conferences our **EDA President Michel Nalet** shared our analysis of today's developments and our dairy vision for the future at European and at global level.

On 25 May 2016, Michel Nalet was one of the key note speakers at the hearing of the COM AGRI on "**new exceptional measures limiting milk production**" in the European Parliament.

Michel Nalet was invited to give a speech at the '**Berliner Milchforum**' on 10 March 2016 - a great opportunity to highlight the importance of Europe for the dairy sector in front of 500 dairy farmers and dairy experts.

At the IDF World Dairy Summit (in October 2016) in Rotterdam (NL), Michel Nalet presented "**Trade policies from the perspective of EU industries**".

Alexander Anton, secretary general

- FEPALE 14th Pan-American Dairy Conference, opening session, "**EU dairy dynamics 2016 & beyond**", 25 April 2016, Frutillar (CL)
- 31st meeting of the Council of the Agricultural Ministers of the South (CAS), "**Dairy situation today**" 26 April 2017, Puerto Varas (CL)
- Israeli Dairy Board study tour, "**EU dairy today**", Brussels (BE), 18 May 2016
- Agri-Food Chain Brussels, "**Dairy perspectives: Brexit**" Brussels (BE), 06 July 2016
- Ethiopian Dairy Forum, "**EU dairy at global level**" Addis Ababa (ET), 12 July 2016
- Polish Dairy Cooperatives Forum, "**The European dairy sector one year after the abolition of the quota system**", Jachranka (PL), 14 September 2016,
- CLAL Dairy Forum, "**Duties and subsidies: experiences in the World - Panel discussion**", Bardolino (IT), 11 October 2016
- DG AGRI Market outlook workshop, "**The dairy outlook**", Brussels (BE), 26 October 2016
- **European Dairy Academix**, study tour of Agrocampus Ovest and University of Applied Science Kiel, Brussels (BE), 15 November 2016
- ARTE TV "thema" "**Gut, besser, vegan**", broadcasted on 10 January 2017
- Bernussou study visit, "**EDA – the voice of the EU dairy in Brussels**" Brussels (BE), 12 January 2017

- DG AGRI 'new directorate B kick off meeting' "**We listen to the outside world**", Brussels (BE), 19 January 2017
- BritChamEU panel, "**Country of Origin Labelling: a Question of Transparency or Nationalism**", Brussels (BE), 31 January 2017

Bénédicte Masure, deputy secretary general

- TTIP Stakeholder Presentations Event, "**TTIP – regulatory and market access issues for the European Dairy Sector**", Brussels (BE), 13 July 2016
- Eurama study visit, "**EDA's structure and mode of action with the EU institutions, its positions on the main dossiers**", Brussels (BE), 20 October 2016

Hélène Simonin, director food, environment & health

- BEL Meeting, "**Sustainability in the dairy field – a European success story**", Azores (PT), 17 May 2016
- Nordic Environmental Footprint, "**Product Environmental Footprint (PEF) of milk: How to represent the farming stage in the assessment**" Copenhagen (DK), 22-23 August 2016
- International Dairy Federation, "**Product Environmental Footprint (PEF) of milk**", Rotterdam (NL), 6 October 2016
- MEP Assistant roundtable, "**The current state of the European dairy market**", Brussel (BE), 23 January 2017
- Food safety in the EU, "**Improving the Sustainability of the Dairy chain and the reduction of food wastage**", Brussels (BE), 24 January 2017

Flora Dewar, trade and economics officer

- Bernussou study visit, "**Dairy market development and dairy trade**", Brussels (BE), 12 January 2017

Kinga Adamaszwili, nutrition, health & food law officer

- Polish Dairy Cooperatives Forum, "**Promocja produktów mlecznych: Możliwości i wyzwania w kontekście obecnej polityki zdrowotnej i żywieniowej w UE**", Jachranka (PL), 14 September 2016,
- Kroměříž Dairy Days Conference, "**Promotion of dairy products: Opportunities and challenges in the context of current health and nutrition policy in the EU**", Kroměříž (CZ), 5 October 2016



Food, Environment and Health in 2016/17



The word of the FEP Chair

We are proud to have taken a solid step in the right direction over the past twelve months for our sector and our beautiful products – making sure that the health and sustainability aspects of dairy continues to play a crucial role now and in the future. The key message of this year and one that summarises nearly all our efforts is...

Everything is connected!

In an always moving and changing world, we can no longer be active in a topic without taking other aspects, irrelevant of the direct linkage, into account. These connections between different sets of policies and actors that exist within a single issue have increasingly strengthened and this means that we can no longer leave aspects out of the equation that were once considered too far removed. This is also the understanding of our members, who during our April 2016 Policy Conference were confronted with a wider than usual spectrum of aspects on sustainability and diets. This not only provided food-for-thought, but also ensured lively discussions – the room was packed from the beginning to the end!

Our work this year was underlined by two visits of Dr Karl Falkenberg, the advisor to the President of the EU Commission Jean-Claude Juncker, to our meetings – a good possibility for him to discuss his ideas on sustainability directly with the European dairy sector. These reflections will ultimately not only shape the environmental, economic and health related legislations, but also be crucial for the agricultural policies of the future. We are therefore very happy to be so heavily involved in these developments, ensuring a key contributory role to the debate and securing a positive place for dairy in a healthy and sustainable future.

Another excellent example of this year's achievements is the Product Environmental Footprinting Pilot (PEF). Here we not only assessed the various impacts and types of input that need to be included in a final methodology, but also managed to gather the most diverse set of stakeholders around a single table: farmers, dairy and packaging industry, retail, ministries and scientific bodies. All come together to find an effective way of assessing the footprint of dairy products as a basis for future policy decisions. The success of the PEF may even suggest that this could be the future way of building strong and inclusive policies via in-depth public-private cooperation?

In my concluding remarks, I would just like to tie everything together by underlining just how much EDA is our association, it represents our interests, defines our concerns and provides us with a single voice at EU level – we can only be as strong as we stand together and can only achieve great things, by taking responsibility, working together and jointly moving ahead towards a brighter, more sustainable future – after all everything is connected!

Jørgen Hald Christensen
FEP Chairman
Direktør Mejeriforeningen





Communicating the benefits of dairy for nutrition, health and its role for the environment

The dairy sector contributes every day to a healthy and balanced diet of the European citizens. One of our key responsibilities is to ensure that our communication on health, nutrition and sustainability aspects of milk and dairy products reaches all relevant stakeholders. In the light of the ongoing intensive debates on the state of health of the European population as well as the impact of diets on the environment, we have organised two major dairy events aimed at discussing these topics, which are increasingly important to our sector:

EDA Dairy Policy Conference 2016 'Sustainability: Food – Diet – Dairy'

On 20 April 2016 over 150 dairy executives and experts, stakeholder and representatives of the European institutions came together around a high-level panel of speakers, to discuss the role dairy can play in sustainable food systems, and the possible needs for adaptation of the policy framework. **The EDA Dairy Policy Conference 2016** was also the opportunity to highlight the sustainability activities undertaken at policy, industry association and company levels.

A full conference report from one of our media partners, the International Dairy Magazine (IDM) is available at our website.



EDA Dairy Policy Conference 2016 'Sustainability: Food – Diet – Dairy' (from left to right): Jørgen Hald Christensen, Danish Dairy Board (DK), Dr Karl Falkenberg, European Policy Strategy Centre (BE), Dr Josta de Hoog, Scientific Council for Government Policy, The Hague (NL), and Dr John Ingram, University of Oxford (UK).

MEP Assistant Roundtable on Dairy Nutrition & Health with MEP Norbert Lins (EPP, DE)

On 23 January 2017, 25 MEP assistants followed the joint invitation of MEP Norbert Lins (EPP, Germany) and EDA to exchange their thoughts during the third MEP Assistant Roundtable 'Dairy, Nutrition & Health'. The focal points of the event were presentations given by Hélène Simonin (EDA) on the current state of the European dairy market and Dr Judith Bryans, CEO of Dairy UK and IDF president. In her presentation entitled 'Can your plate change the planet?', Dr Judith Bryans effectively demonstrated the importance of milk and dairy products in a healthy and sustainable diet.

"We had chosen the headline of 'sustainability' for our roundtable this time, because I believe that the economic, environmental and social sustainability of the dairy sector is key. Our roundtable is therefore always a very good opportunity to share these messages and to discuss them in-depth", concluded MEP Norbert Lins.



Hélène Simonin (EDA), MEP Norbert Lins (EPP - Germany) and Dr Judith Bryans (Dairy UK)

The European dairy sector in the middle of global change

A sustainable dairy sector and global sustainable development

The dairy industry is fully aware of its responsibilities in the climate change debate and has been moving in the right direction of attaining sustainable production cycles. With governments reaching agreement in Paris at the COP21 in 2015 and the United Nations (UN) releasing the Sustainable Development Goals (SDGs) all aspects of sustainability



Food, Environment and Health in 2016/17



Dr Karl Falkenberg with Jørgen Hald Christensen, FEP Chairman, CEO Danish Dairy Board

are now more than ever on the agenda. And these are all linked – not one can be singled out, as they are ‘indivisible’. The European dairy industry is aiming at being at the forefront of the implementation process by making a positive contribution to the wide range of SDGs. On 8 September 2016, Dr Karl Falkenberg, senior advisor to the President of the EU Commission and author of the influential ‘Sustainability Now!’ report, was invited to discuss with our EDA Food and Environment Committee the overall sustainability agenda and how dairy could contribute to achieving the ambitious 17 SDGs. Our EDA factsheet ‘The European Dairy Sector & the Sustainable Development Goals (SDGs)’ lists the various connections between the SDGs and our activities in the dairy sector.

This drive towards sustainability was further underlined by the global dairy sector and the UNs Food and Agriculture Organisation (FAO), through the joint signing of the **Dairy Declaration of Rotterdam** in October 2016.

Based on all of the above, the sector has established a well-equipped framework for achieving its sustainability goals, significantly reducing its climate, environmental impact and contributing to the nourishment of people, landscapes and health, as well as supporting jobs and infrastructure and reducing poverty.

The European Emissions Trading Scheme (ETS)

The Emissions Trading Scheme represents a core pillar of the EU’s solution to reducing industry emitted greenhouse gases. In the current ETS framework a few dairy products were given a specific status in the scheme, as they are recognised to be at risk of carbon leakage. This means that the production is at risk of moving (‘leaking’) outside the EU due to increased production costs. Now with the new ETS framework for 2020-2030 being discussed, the important question is whether these products can remain on the carbon leakage list.

The removal of the carbon status would subsequently mean steep increases in production costs and therefore negative competition effects in relation to third countries that have no ETS. It is vital for us to protect the competitiveness of our production by ensuring

the conservation of the carbon leakage status for a restricted number of dairy products.

As EDA, we have therefore prepared an assessment of the sector’s position in the projected ETS framework, and liaised with other sectors and parts of the agri-food-chain all of which find themselves in a similar situation.

Our efforts were rewarded when the European Parliament’s Environmental (ENVI) Committee adopted a draft resolution that could ensure the remainder of certain dairy products status on the carbon leakage list.

The ENVI Committees’ decision will hopefully be an inspiration in 2017 for the EU Council, when the Maltese EU Presidency is ready to coordinate a final decision. Until then the EDA will ensure that the voice of the European dairy industry is heard at every step of the way.

Land-use, Land-use change and Forestry (Lulucf) in the climate context

In line with the 2015 Paris Agreement (COP21) and the EU’s objective of including all sectors in achieving its ambitious emission reduction targets by 2030, the Union’s new energy framework is to include the land-use sectors. On 20 July 2016, these notions became more concrete with the EU Commission launching a land-use, land-use change and forestry proposal, which was based on the principles of effort-sharing amongst all stakeholders and the encouragement of carbon sequestration - meaning capturing carbon in the soils, plants and trees. The general objective is to decrease the collective emissions by 2030 by 30%.

Within EDA, we have developed and shared our position vis-à-vis the European Parliament and Council, who will be key in determining the outcome of the proposal. The positive contribution dairy can make in maintaining grasslands and lively rural areas cannot be encouraged enough with regards to this policy innovation.

National Emission Ceilings (NEC)

The renegotiations of the national emissions ceilings in the EU were a heavily contended issue, and were followed closely at EDA. This is due to the fact that too tight emission ceilings, especially on methane and ammonia, would have a detriment effect on the dairy industry and farms.

In response to the first draft that was being discussed in the Environment Committee of the European Parliament from August 2015 onwards, we reached out to MEPs and shared relevant information with them, e.g. that the methane output of livestock can only be limited to a certain extent.

While, the final European Parliament plenary vote in October 2016 did include methane targets, these would not apply to the livestock sector. This positive development was later picked up by the European Council, who dropped the methane target all together and lowered ammonia levels in its final decision.





Sustainable Diets

The notion of a sustainable diet and its role in future environmental actions was a key issue for EDA in 2016. With ongoing public discussions about the role of animal products in people's diets, it is vital that we ensure at Brussels level that the correct information is made available to the relevant stakeholders and decision makers.



We therefore released an EDA fact sheet 'Why dairy is so important for achieving a healthy and sustainable diet' with the most recent science on the role of dairy products in a healthy and sustainable diet. Not only does this paper advocate dairy and its many health-related benefits as a fundamental part of any diet, but it also shows that milk and dairy actually have a smaller environmental impact compared to other foodstuffs, when taking into consideration the significant nutritional value of milk and dairy.

Linking nutritional and environmental assessments only works, when the different aspects of diets as a whole and not only single foods are analysed while taking the environmental impacts into consideration.

Currently science limits itself when researching dietary changes to only considering the respective carbon footprint and possibly some minor additional indicators; in the future it will be key to have an approach that is as comprehensive as possible and looks at the issues from all relevant angles.

Moreover, it will be an essential challenge for the dairy sector and hence for us within EDA to keep this debate on the right track. Otherwise we run the risk of seeing the occurrence of dietary ideals and recommendations that do not reflect the basic nutritional requirements, therefore being unhealthy for people.

The positive image of milk and dairy

Milk and dairy products have been known to carry unique and overall positive attributes for centuries. The positive image of dairy has however in recent years been misused by dairy substitutes and 'ersatz' products, that not only squander the positive characteristics and images of milk and dairy, but also their nutritional benefits.

In order to continue and improve the positive image of dairy, it will be vital to actively communicate the unique and specific qualities of our products.

The baseline for our communication work is what we refer to as the 'Dairy Protective Shield', which is a comprehensive collection of positive arguments on dairy, as well as answers to questions. This project runs along five topical themes: environment, animal health & welfare, nutrition & health, dairy processing and a global sector. Furthermore, we have launched via our member associations a survey, asking how dairy is perceived; not only will this provide us with a clear and EU wide understanding of the issue, but it would also allow us to establish targeted communication strategies. By identifying wrong or not proven information that is currently circulating, this project will help us to respond with scientifically based arguments in the most effective manner.

Dairy marketing standards and the protection of dairy terms

With the European dairy market being continuously infringed upon by alternative products, which claim to offer a direct replacement to the nutritional value of dairy, it is now more important than ever to protect the special terms of dairy.



That is why, through discussions both within the EU institutions and within various food association, we have ensured that these dairy terms are effectively protected throughout Europe. We have published several EDA documents on the topic, like our EDA statement 'What is milk? Or the story of dairy protected terms', or our EDA position paper on marketing standards and an EU cheese definition.



Food, Environment and Health in 2016/17

Assuring a sustainable production all along the dairy chain

The new Dairy Product Environmental Footprint (PEF) between product tests and consumer perceptions

The Dairy PEF and its Product Environmental Footprint Category Rules (PEFCR) - coordinated by EDA - are now nearing its finalisation.

EDA, along with six dairy processors and other institutional and private stakeholders, is developing a comprehensive set of rules for the assessment of the environmental footprint of products. This will be a scientifically based and harmonised basis to inform consumers and other actors along the supply chain about the environmental impacts of the product. It will also allow them to not only improve the overall footprint of products, but also help each actor in directing their work on sustainability more efficiently.

The Dairy PEF as part of the 15 Life Cycle Impact Assessment (LCA) categories, takes into consideration a broad range of environmental issues. The added value of this methodology is not only to look at carbon footprint – an important, but only one indicator – but to have a wider understanding of actions to improve the footprint also for water, land use, fertilisers use, etc.

Since its induction in 2013, the framework of the Dairy PEF has been taken up by the EU Commission's DG Environment, in its initiative 'Single Market for Green Products' and it is set to provide the basis for any further European regulations in this context.

Just as there are environmental footprint labels for most electronic goods, the EU Commission has launched this pilot phase for similar schemes for many other food and non-food products, which will come to form a key pillar in future EU legislative proposal on circular



economy. EDA and the dairy pilot actors have taken this unique opportunity to co-create and shape the methodology for the assessment of dairy products.

This project is now in the testing phase for the communication tools. The communication vehicles have the aim of communicating environmental footprint information along the chain, increasing visibility and raising awareness and thus improving the environmental footprint. The communication is based on three of the 15 impact categories: climate change, water resource depletion and land-use, and test their understandability, and propensity to change behaviour at different parts of the chain.

Additionally, the methodology is being independently revised by a panel of four global experts.





The dairy industry efforts on food wastage reduction and the new EU platform

Food losses and waste, the first during the production process and the second mainly in private households, continues to be a hot topic and has become an essential component of the EU's sustainability efforts. This has also translated into our work and we have released EDA factsheets on the continuous efforts and achievements of the dairy sector in reducing food losses and waste, not only during the production cycles, but also at the end stage, with the consumers.

In recognition of the successful work that has already been carried out in the EU dairy industry, and as a potential driver for further steps, EDA has been appointed a member of the newly created **EU stakeholder's platform on Food Losses and Food Waste**, led by DG SANTE. Here we will represent the accomplishments of the dairy sector to the fullest and further help and highlight its dedication to reducing food waste in all stages of production in a joint effort with other sectors and actors along the agro-food-consumption chain.

Animal health and use of antibiotics and anti-microbial resistance

Healthy cattle – as well as sheep, goats and buffaloes – are the key to producing safe and high quality milk. These animals that give us our valuable milk therefore require particular care and attention.

The European dairy industry fully endorses and supports a responsible use of antibiotics for dairy animals. Antimicrobials are after all necessary for treating sick animals. All raw milk is tested according to the regulatory framework and will be used for dairy processing only if it fully complies with the regulatory requirements, thus ensuring food and consumer's safety.

Our EDA statement clarifies this point and has been widely shared; it is available on EDA's website.



The use of antimicrobials, either in human or veterinary medicine, might result in the development of antimicrobial resistance (AMR) and might have an impact on human and animal health. The Dutch

“Our EDA Dairy Policy Conference in 2016 focused on ‘Sustainability: Food – Diet – Dairy’ and we have shown how we have brought our activities and achievements to the next level. At an EU level, we also see sustainability has become a vital part of the agricultural policy debate, as well as for our customers and consumers, which has big implications for our industry”.



Richard Laxton,
Sustainability Manager, Arla Foods
Chair of the EDA Sustainability Working Group

Presidency in the 1st half of 2016 has declared the fight against AMR as one of its priorities. The dairy industry is fully aware of the importance of limiting the resistance of disease-causing bacteria to antibiotics. Reducing the risk of antibiotic resistance requires ‘fewer antibiotics’ and ‘better antibiotics’, i.e. antibiotics with a specific effect instead of a broad-spectrum of application. The new EU Animal health regulation has recently been adopted, and the EU Commission is now planning the upcoming work on the delegated acts.

Best Available Technique Reference Documents (BREF)

BREFs are industrial benchmarks for different kinds of emissions from manufacturing sites (as e.g. for dust or used waters) that were developed by the EU authorities. While the benchmarks in the revision of the 2006 document are still only now being fully compiled and therefore find themselves very much at the beginning stages, they are set to become mandatory standards for producing within the EU once completed.

The dairy industry and EDA therefore have good reasons to be interested in these processes, as they could have detrimental effects on the dairy industry if they do not reflect the specificities of the dairy reality on the ground. It is through EDA action and thanks to the input by our members, that we strive to ensure that the rules under discussion truly reflect the reality of the future dairy processing market.

We have actively been following these objectives by assisting the EU Commission's Joint Research Centre (JRC) in their work, providing ample sectorial information and industry expertise. More recently, the JRC has released its first draft conclusion on the ‘Food, Drink and Milk Industry’, which are currently being revised and await final commenting.



Food, Environment and Health in 2016/17

Circular economy and production

The dairy sector at the heart of a circular production cycles

The notion of circularity has taken a primary focus in the EU Commissions new 'Better Regulation' agenda. As a part of this agenda the **EU circular economy package** of December 2015 foresees both legislative proposals and non-legislative actions plans. Calls for a circular economy are not only shared by EDA, but also by other food sector associations, as it is seen as a vital step towards allowing further resource efficiency and reducing the environmental footprint of industries. Furthermore, it presents the opportunity for an increase in efficiency in production and therefore reduce costs. But of course all of this needs to be done in continued assurance of food safety and quality.

We have released an EDA fact sheet on circular economy and how the encompassing principles can be applied in the dairy sector. Moreover we will continue to coordinate with other food industry actors in promoting circular economy.

Former foodstuffs

According to Regulation 68/2013, 'Former foodstuffs' means 'foodstuffs', other than catering reflux, which were manufactured for human consumption in full compliance with the EU food law, but which are no longer intended for human consumption for practical or logistical reasons or due to problems of manufacturing or packaging defects or other defects, but do not present any health risks when used as feed'.

For dairy, the term hence refers to a broad variety of products from whey to left-overs from cheese productions.

As specified in the EU Commissions 'Communication on Circular Economy', the EU Commission has planned to take measures to clarify the EU legislation in order to facilitate the utilisation of former foodstuffs for animal feed, thus reducing food wastage. Indeed, former foodstuffs are part of a broader framework encompassing also Circular Economy, Hygiene and ABPs. To clarify the links and overlapping among the different applicable sets of legislation, the EDA Secretariat provided an overview of the relevant EU laws.

One of the actions coming out of the Communication is the EU Commissions work on guidelines on the legal status of 'former foodstuffs' for feed use. EDA contributed to the elaboration of these EU guidelines through our EDA a position paper of June 2016. In November 2016, the draft EU guidelines for use of former foodstuff as feed were discussed with member states experts on feed and environment, and presented for discussion to the EU Platform on Food Losses and Food Waste on 29 November 2016. We shared our EDA position paper with the EU Commission on 20 January 2017.

While these draft guidelines reflect some of our input, no clear solution is foreseen for solving the following issues: transport of

milk and milk products (including whey) in tankers and ABPs (animal by-products) labelling; registration of dairy plants or further requirements of feed hygiene legislation; passed durability dates. The dairy industry considers of major importance that the guidelines of the EU Commission on 'former foodstuffs' and their place in the overall picture of hygiene and animal health related laws, are fit for purpose. With this we meant that it needs to support an increased use of animal by-products from the food sector as feed, where use as food is no longer possible, and not impact other uses of dairy by-products. We therefore seek for a more ambitious guide to address the open issues at stake for the dairy sector.

Water footprint and re-use

Water use is a hugely important and immensely complex issue and part of the indicators of the PEF (see PEF).

A global water footprinting guide for use in the dairy sector has been published and the options for safe re-use of water are the main angels of attention of our current EDA work on water.

Since end of 2015 and the framework a consultation on water re-use initiated by the EU Commission, we had the opportunity to put forward our ideas for overcoming the current legislative difficulties without compromising food safety. Following the public consultation, the EU Commission published a summary report contemplating further changes in the EU legislation and argued for additional EU guidances. In particular, the EU Commission plans to include certain measures on water re-use via the circular economy package, but these only address a limited scope, especially when linked to irrigation and aquifers. The dairy industry therefore asked for a wider scope of ambition, to address water re-use inside the dairy production cycle.

A clearer definition of the different types of water is needed. In some member states the legal framework is further complicated by an overlapping terminology, like 'secondary water', 'technical water', 'process water' or 'white water'. The challenge is to address possible legislative barriers to further enhance re-use where the resource water is scarce and still maintain all food and human safety measures needed. On CODEX ALIMENTARIUS level, a revision of the general principles of food hygiene incl. HACCP is ongoing and, in parallel, the revision of the WHO guide lines is expected by 2019 and both will be targeting this dilemma.

We therefore organised a joint session between our EDA Hygiene WG and our EDA Sustainability WG, in order to determine how to best put forward the needs of the dairy industry.

A next step will be to clarify definitions, interpretations, and regulatory requirements in EU member states. Indeed, the dossier is a challenge for European legislators, as many provisions differ in the member states and are highly complex.





Food safety and quality production along the chain

Revision of the rules on official controls

The new future Regulation were part of a package of proposals presented by the EU Commission back in May 2013 and were designed to strengthen the enforcement of a broad range of rules applicable to the agri-food chain.

The European Parliament and the Council reached a political agreement on the new Regulation on Official Controls on 15 June 2016, these will abrogate the current Regulation on Official Controls 882/2004. On 19 December 2016, the text was adopted in the Council at first reading and the vote in the European Parliament plenary will take place in March 2017. The Regulation is expected to be applicable as of 2020.

Including the preparatory phase, the whole legislative process for this dossier took more than 8 years.

We as EDA followed this process with a special focus on potentially critical issues for the dairy sector.

In reaction to this EDA established in November 2016 an overview of the legislation highlighting relevant amendments for the dairy industry to give some dairy guidance through the implementation process.

Inspection fees

On the basis of our 2014 EDA position paper where we propose several amendments, the issue of inspection fees was also discussed in depth within our EDA Hygiene WG meetings.

While administrative procedures are within the remit of the exclusive competence of the member states, the new Regulation will retain the general requirement according to which member states must ensure that adequate financial resources are made available to provide the staff and other resources necessary for the competent national authorities to perform official controls and other official activities.



Mandatory fees (flat rate and actual costs) will be levied on operators for official controls, such as on milk production and during official controls done at border controls on products of animal origin.

EU HACCP Guidance document

EDA commented on the new draft version of the EU Commission's guidance on food safety management systems including HACCP (Hazard analysis and critical control points) of April 2016. On 30 August 2016, the final EU Commission's guidance was finally published in the Official Journal. This will be a valuable reference document as it reflects our EDA comments.

Animal by-products (ABPs)

Animal by-products are 'materials of animal origin that are not or no longer intended for human consumption, within the meaning of the Hygiene regulation, and following the provisions the provisions of Regulation 1069/2009 of the European Parliament and of the Council and EU Commission Regulation 142/2011'. The animal by-product regulations aim to reduce risks to animal and human health by providing clear rules for the treatment of animal by-products.

ABPs are used among others as animal feed, organic fertilisers and soil improvers, as well as for technical products.

For the dairy sector, by-products are an important part of the business, even if not the major aim of production. The circular economy approach is at the heart of the dairy sector and by-products valorisation has been improving for many decades.

The current legislative framework on ABPs is an important basis, but still contains unnecessary burdens for the dairy industry. Implementing Regulation 142/2011 is especially relevant here even though several inconsistencies still need to be addressed, namely regarding centrifuge concentrate, transport requirements, colostrum and whey for feed use. EDA is working to alleviate these parts of the texts and produced a position paper on the topic, highlighting especially the status of liquid whey and so-called centrifuge sludge, in December 2016. EDA supports a change in terminology to better describe the product as factual 'centrifuge concentrate'. The positioning has been shared and will be further discussed with the EU Commission.

"Our dairy products enjoy a well-deserved high quality reputation all over the world. Food hygiene is the basic requirement for this image and our work at EDA is key to guarantee that all EU regulations in this field are fit for purpose."



Nelly Delfaut,
Chargée de mission Regulatory
and Scientific affairs ATLA
Chair of the EDA Hygiene Working Group



Food, Environment and Health in 2016/17

Dairy food production processes

EDA membership of the EFSA Discussion Group on Food Chemical Occurrence Data

EDA is an active member of the European Food Safety Authority (EFSA) Discussion Group on Chemical Occurrence Data which combines the expertise of various sectors on food additives, enzymes and contaminants.

The EFSA Discussion Group is composed of stakeholders' organisations, such as consumers' organisation and several food industry sector associations with major interest in the EFSA scientific assessment of food additives, contaminants, and this year also enzymes.

In October 2016, the EDA delegation led by Christian Bruun Kastrup (Danish Dairy Board, and Chair of EDA Additives & Contaminants Working Group) participated in the 3rd annual expert meeting of the Discussion Group.

Within the discussions, EDA raised several points including how to further improve the industry's contribution to the EFSA data collection on food additives, even though European dairy companies, coordinated by EDA, are already regularly contributing to the data collections.

EDA as a data provider to EFSA safety evaluation of food additives

Food additives are substances added intentionally to foodstuffs to perform certain technological functions, for example to colour, sweeten or help preserve foods. In the EU, food additives are subject to an independent safety evaluation by the European Food Safety Authority (EFSA) before they are permitted for use in food and additionally are kept under continuous observation. Over the past years, EFSA has been carrying out a wide re-evaluation programme of all additives currently permitted in the EU. For the purpose of this safety evaluation, EFSA is regularly publishing calls for data, including data on the actual usage levels by the industry. EDA takes an active role in the EFSA data collections and acts as a coordinator of information on the use of additives in the European dairy products. Thanks to our members input and commitment, we have been able to submit relevant dairy data for the EFSA calls in Batch 4 (May 2016) and Batch 5 (January 2017). We will continue to follow the re-evaluation programme very closely.

EDA follows EFSA safety assessment of food enzymes

Enzymes are naturally-occurring protein composites that enhance biochemical reactions. Food enzymes have an important technological function in food processing. When it comes to dairy, rennet is probably the most important food enzyme used for transforming milk into solid curds in cheese and whey production. Enzymes are non-toxic and not of safety concern for consumers

"It is a very important task for the working group, to be in a close dialogue with the EU Commission and the national authorities to ensure that relevant, useful and safe additives are permitted for their specific and technologically justified use, while at the same time protecting the natural and healthy image of dairy based products."



Christian Bruun Kastrup,
Chief Consultant Dairy
Danish Dairy Board
Chair of the EDA Additives & Contaminants
Working Group

since they are naturally present in food ingredients. However, food enzymes produced industrially are assessed for safety by EFSA. The scientific assessment process will take several years as more than 300 enzymes need to be evaluated. Based on the EFSA scientific assessment the EU Commission and member states will eventually establish a 'Union list of enzymes'.

In February 2016 EDA participated in a technical EFSA meeting to discuss a new EFSA approach in evaluating the exposure of enzyme consumption. The meeting showed that many scientific questions still need to be clarified in order to ensure a smooth evaluation process. Together with our members, we will continue to accompany this EFSA evaluation process in the years to come.

Organic production and products

The markets for organic dairy products are interesting ones within Europe and at the global level.

The current organic legislation 834/2007 has allowed the organic milk production in Europe to grow substantially.

The EU Commission proposed a review of the organic legislation back in 2014, which included stricter rules for organic products and organic production. The whole of last year the proposal was being discussed in informal trilogues between the three EU institutions.

After three years of political discussions, the most controversial issues are still being figured out, namely the re-classification of organic products, the question of imported organic products, the frequency of official controls and questions about enrichment of these with vitamins or other nutrients.





European Cheese Guidance

The guidance for ‘Cheese as raw material’ was drafted back in 2008-09 to provide guidance on what can be used and how it should be treated for (re)use, e.g. in preparation of processed cheese.

At EU and member state level this topic did not gain the necessary momentum over the past years.

Today, current political ideas encourage further resource efficiency, which has allowed us to create the opportunity of presenting our guidance to the member states for adoption as a European guide. This aims at getting the huge amount of work done by our experts over last ten years to be recognised and help the coordination between industry and authorities on national level.

The process of getting approval of the industry guide on the EU Commission’s website has started early 2017 and we are confident that the outcome by the end of this year will be successful.

Speaking to customers and consumers via our products

Health claims and nutrient profiles

Since the EU Commission launched its ‘Roadmap on the Evaluation and Fitness Check of Nutrition and Health Claims Regulation’ in autumn 2015, there has been an ongoing reflection whether the concept of Nutrient Profiles (one of the aspects of the Claims Regulation that has never been implemented) is still relevant in its current context.

After publication of the terms of reference for the evaluation on nutrient profiles in June 2016, we have been particularly active in promoting the position of the European dairy sector, which calls upon the EU Commission to eliminate the concept of nutrient profiles. The public consultation was launched at end of December 2016 and thanks to the input of our members, EDA is one of the most active participants in these important discussions.

In light of the current legal requirements, the concept of nutrient profiles is outdated and redundant. The European consumer is

already protected against any misleading communications and the EU’s food labelling laws also ensure that the consumer is well informed on the nutritional value of foods. For example, Regulation 1169/2011 on food information for consumers requires comprehensive nutrition information on the levels of energy, fat, saturates, carbohydrate, sugars, protein and salt on all foods.

Endless discussions on nutrient profiles at all institutional levels in Brussels and beyond have shown that this issue cannot be solved due to the complexity and diversity of diets and foods. The fact that nutrient profiles have not been implemented over the last 10 years (since the adoption of the Claims Regulation 1924/2006), highlights the inadequacy of the artificial concept of nutrient profiles in addressing the complexities of foods and basic principles of human nutrition.

Data collected by EDA and our members throughout the EU display a evident negative economic impact if nutrient profiles were to be enforced in the EU dairy sector. This aspect needs to be carefully considered given the current economic climate in the EU. Introduction of nutrient profiles would have a major impact on innovation and the competitiveness of the dairy sector, including potentially huge economic consequences for dairies and dairy farmers. In light of the potential risk of implementing nutrient profiles, EDA has been very active in ensuring its concerns are heard.

Food Information Regulation

The Food Information Regulation 1169/2011 represents a harmonised legislation on consumer information and gathers all labelling requirements on food products in one place. In December 2016, a nutrition declaration was made mandatory with the objective of creating transparent labelling information on the nutrient content in foods. However, certain issues on the interpretation and implementation of the Regulation still persist, such as on the issues of origin labelling and trans-fatty acids.



“In our Annual Convention 2016 in Nice, we hosted a session on ‘communicating the goodness of milk and dairy in its diversity’ and we discussed and compared our views with representatives of the retail sector on what the consumer really wants to know about milk and dairy and the way to provide these information to them.”



Eric Grande,
Regulatory Affairs Director
Groupe Lactalis
Chair of the EDA Claims
& Labelling Working Group



Food, Environment and Health in 2016/17

Origin labelling

Local, regional or national indications of origin of milk used in dairy products can be a very useful marketing tool where feasible or appropriate. While voluntary rules allow producers to add origin indications when this is feasible and it would bring an added value, compulsory origin labelling increases the overall costs for the milk processing industry at all stages and may be confusing for the consumers.

Within EDA, our position is clear: only voluntary origin labelling is an option for milk and dairy products.

In 2016 the EU Commission has presented a draft EU Commission Regulation on voluntary origin labelling rules and during the consultations, EDA submitted several rounds of comments. The draft EU Commission Regulation is scheduled to be finalised in the course of 2017.

Despite the EU Commission being in favour of voluntary rules, the European Parliament and several member states continue to put political pressure in favour of the introduction of national mandatory rules for country of origin, in particular for drinking milk, dairy products and other dairy ingredients.

In March 2016, the French Minister of Agriculture announced that France will introduce a two-year 'testing' period for mandatory origin labelling for milk and dairy. Despite the measure being widely opposed not only by the food industry, the EU Commission has given a green light to France in July 2016 to introduce their national law on origin of foods. This was immediately followed by similar political developments in other member states, including Italy, Lithuania, Romania, Greece and Finland.

EDA has been the leading force in Brussels when it comes to the advocacy against national mandatory measures that hinder the free movement of goods among EU member states and threatening the integrity of the EU internal market.



MEP Dr Renate Sommer (EPP, Germany) and EDA secretary general Alexander Anton debated on mandatory origin labelling on a podium at the British Chamber of Commerce in Brussels in January 2017

We therefore filed an official complaint with the EU Ombudsman against the decision of the EU Commission. Our dialogue and narrow cooperation with the services of the EU Ombudsman have been a valuable basis for our future work on origin labelling. EDA has been and will continue to be very outspoken on this issue. By allowing the adoption of numerous national decrees on mandatory origin labelling, the **EU Commission has failed to defend the European Single Market** and has opened the floodgates to notions that threaten the fundamental principles of the EU Treaties. We furthermore remain deeply concerned by the latest developments and the steps towards nationalisation and fragmentation of the EU Single Market.

Trans-Fatty Acids (TFAs)

Trans-Fatty Acids are a certain type of fat that are found in processed foods (industrial TFAs, iTFAs) but are also naturally occurring in small amounts in dairy products and meat (ruminant TFAs, rTFAs). There is a key differentiation between the two types of TFAs that are found in these different food groups. While ruminant TFAs are naturally found in dairy products in small amounts and represent an integral part of milk, industrial TFAs are found in processed foods.

Thanks to the intensive work of EDA in all levels of Brussels and beyond, the differentiation of ruminant TFA has finally been recognised by the EU Institutions in the past years. The main focus of current discussions is therefore strictly on industrial TFAs. In October 2016, the European Parliament called for limits on industrial TFAs and in parallel the EU Commission published a Roadmap on the impact assessment of TFAs, with the aim of limiting industrial trans-fat intakes in the EU. The EU Commission

"Voluntary origin labelling is of crucial importance to milk and dairy products. But the multitude of different national schemes on mandatory origin labelling will create serious problems to the trade of goods on the European market, and will have consequences in the equilibrium of the market itself. Dairy companies asks for 'more EU': harmonised rules on food labelling is a fundamental pillar for trade and for a competitive dairy industry."



Rosanna Pecere,
Manager international affairs ASSOLATTE
Chair of the EDA Origin Labelling Task Force





assessment clearly states that: “This initiative would focus on industrial trans fats, given that ruminant trans fats sources generally contribute in a limited way to the total daily energy intake and ruminant trans fats are naturally present in foods that are important in the EU diet and cannot therefore totally be avoided.”

Several options are being considered by the EU Commission, including establishing EU legal limits of iTFA (this is an option that is already implemented in several member states), introduction of TFA labelling and prohibition of partly hydrogenated oils (PHO) in foods (US approach).

The EU Commissions impact assessment was a good opportunity for us to highlight that the introduction of TFA labelling must not apply to naturally occurring ruminant TFAs.

As EDA, we will keep following all developments so as to ensure that the specificities of (natural) ruminant TFA are fully recognised. We expect the publication of the EU Commissions impact assessment in the 3rd quarter of 2017.

Feed material catalogue

Dairy products being sold to feed manufacturers or directly to farmers for feed use need to be included in the catalogue or online register for feed materials, as a part of EU legislation. EDA is a leader for the dairy categories and is working with several other associations on their regular updates.

Being requested by the EU Commission and many member states, the catalogue has recently been amended. A major difference is that processing aids used for making the feed materials must be recognised as feed additives and will therefore need to be specifically labelled. Furthermore, all additives (mentioned on the feed additive list) will need to be listed as feed additive when they are added after the decision is taken that the product is an ABP. The discussions with the EU Commission and the member states on other parts of the draft feed materials catalogue update are currently ongoing.



Highlighting the positive role of dairy for Health and Nutrition

Nutrition science positions dairy products as natural sources of high quality protein and sources of vitamins and minerals, including calcium. The health benefits of milk and dairy have been continuously acknowledged in dietary recommendations of all national health authorities. The current dietary advice in the EU recommends on average 2 to 3 servings of dairy per day for adults and 3 to 4 servings for children. Unfortunately, the consumption data show that in many countries people do not meet their dietary recommendations for dairy which may lead to important shortages in nutrients. It is therefore important that the dairy sector and health authorities continue to promote the health benefits of dairy, as part of a balanced and varied diet for European citizens.

Scientific Advisory Board Dairy Nutrition & Health (SAB DNH)

In order to provide substantiated and up-to-date EDA communication, we make sure that our messages are backed by the latest scientific evidence. The EDA Scientific Advisory Board Dairy Nutrition & Health (SAB DNH) is an active network of the top European dairy experts who oversee our scientific publications and papers on nutrition and health.

Dr Judith Bryans, CEO of Dairy UK and Chair of the EDA Scientific Advisory Board, held the group’s second meeting in September 2016 in order to discuss the scientific developments and new projects in nutrition and health. The group also focused on new communication material that could assist in spreading the word on the nutritional benefits of dairy.

The meeting was additionally an excellent opportunity to discuss current and future dairy issues with the relevant EU authorities.

“We share key messages on the nutrient richness of milk and dairy products and their role in the diet and health with opinion formers in Brussels and beyond. Science underpins our messages and always will as we believe health policies need to be evidence based. We are determined to further strengthen our ability to reach out to the decision makers both at European and national level.”



Dr Judith Bryans BSc PhD RNutr.
*Chief Executive DairyUK
 Chair of the EDA Scientific Advisory Board
 Dairy, Nutrition & Health*



Food, Environment and Health in 2016/17



Product formulation and added sugars

The health and nutrition debate has always been a very special one for the dairy industry. For decades, the European dairy sector has put a lot of effort, research and resources to ensure that consumers have access to a wide range of nutritious dairy products. In the past year we have seen an intensification of debates on 'product formulation', in order to reduce 'bad nutrients' in foods and drinks. After concentrating on salt and saturated fat in the previous years, the main focus of 2016 and 2017 was on the reduction of added sugar.

In 2016 the EU Commission and EU Members States experts endorsed a strategy on reducing added sugars in foods and drinks, including for sweetened dairy products. The new voluntary policy (so called 'Added Sugar Annex') aims at setting 'general benchmarks for added sugar reduction of a minimum of 10% by 2020 in food products against the member state baseline levels at the end of 2015 or to move towards 'best in class' levels'.

Of course, public health policy remains an exclusive national competency, we support the EU Commission's ambition to limit its role to coordinating activities on member state level.

Keeping in mind that dietary guidance and science increasingly recognise the importance of total nutrient content of food rather than of particular individual nutrients, we voiced on numerous occasions, and at all levels of the EU Commission and in member states, that dairy products are low contributors to added sugar intakes in Europe while they are high contributors of essential nutrients in all population groups.

In 2016 the Dutch EU Presidency has taken up product reformulation and the reduction of fat, salt and sugar as one of its priorities. The



Dr Judith Bryans (Dairy UK) with Stephanie Bodenbach (EU Commission, DG SANTE)

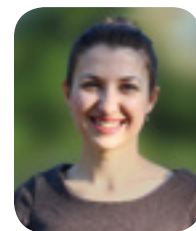
Dutch 'Roadmap for action' presented in February 2016 called for 'combined action to make food products healthier by gradually reducing the amount of salt, saturated fat and sugar (calories).' EDA together with our member associations remain closely engaged with the relevant stakeholders, highlighting together that any approach on product reformulation must reflect the cultural richness and diversity of dairy products across Europe as well as the unique nutritional value of milk and dairy. The overall focus on negative nutrients is misleading and unhelpful for the consumers. A more successful impact on health and fitness of the population may be given by recognising the role of whole foods and diets, as well as positive motivations and pleasures.

EDA appointed as the voice of the EU dairy industry in the EFSA Stakeholder Forum

In November 2016, the European Food Safety Authority (EFSA) based in Parma, Italy, has appointed EDA as an EFSA registered stakeholder. The new EFSA Stakeholder Forum, chaired by the EFSA Executive Director Bernard Url, will provide strategic input to EFSA work plans and future priorities. The first meeting of the EFSA Forum will take place in May 2017 in Parma.



Hélène Simonin
*Director Food,
Environment & Health*



Kinga Adamaszwill
*Nutrition, Health
& Food Law Officer*





2016

Dairy Market 2016: High Stocks, low milk-prices

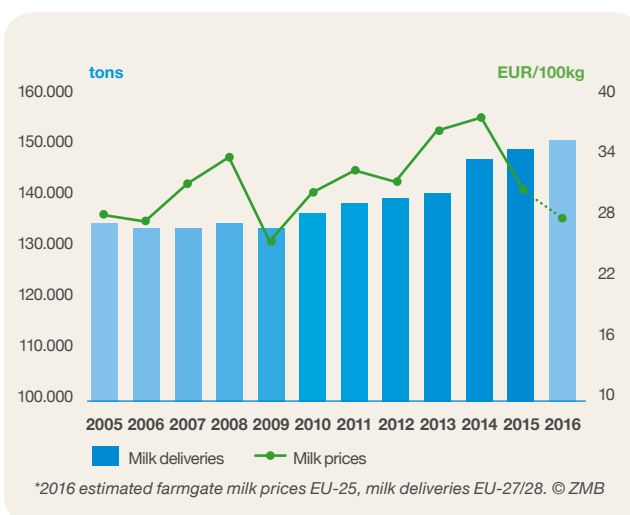
2016 was the first quota-free calendar-year for the European Dairy Industry. It was another challenging year of volatility with highs and lows, but in average the weight of the lows is heavier. Milk prices fell to their lowest level since 2009. While milk fat was relatively strong, the market for protein was oversupplied. The biggest intervention stocks of skimmed milk powder since the beginning of the 1990's built up.

Framework conditions:

- Private storage and intervention of skimmed milk powder was extended until end of February 2017. The ceiling for intervention purchases at fixed price was extended from 109.000 tons to 350.000 tons.
- The private storage of butter was open until end of September 2016.
- Among other measures an aid-package of EUR 500 Mill. was provided by the European Commission to support farmers. From this package EUR 150 Mill. had been foreseen for a milk production reduction scheme.
- Regular intervention will continue from 1st March 2017.
- The Russian government extended the import ban for dairy and other food products from EU, imposed in August 2014 up to the end of 2017.

Milk deliveries increased modestly

EU-milk deliveries reached a new record of 153 Mill. tonnes according to ZMB-estimations. Compared with 2015 this means an increase of nearly 1 Mill. tonnes or 0,4 % adjusted for leap day. This was the slowest growth since the decrease of milk intake in 2009. Farmers reacted to lower milk prices with a certain time-lag.



More cows have been slaughtered than in the previous years. In the first ten months of 2016 slaughter-numbers increased by 6,4 %. The weather conditions and harvest of forage and fodder had been less favorable than in the previous year in many regions, which also contributed to a lower milk production too.

The milk output has been mixed throughout the year. A strong increase of 4,5 % was observed in the first quarter, compared with the three months of the quota-era. In the second quarter growth shrank to 0,4 %. Since June milk intake moved below the level of 2015 with growing rates of decrease. In the last quarter of 2016 the milk production reduction scheme of the European Union was in place. Farmers could apply for reductions of milk deliveries up to a total of 1,1 Mill. tonnes and receive a compensation up to 14 Cent per Kilogram from the EU-Budget. Member States were allowed to increase the compensation. Four tenders over different 3-months-periods would have been possible, but the financial ceiling was nearly reached in the first tender for the period September to December 2016.

Delivery behavior among the Member States was very different. It covers a range from an increase by around 8 % in the Netherlands to a reduction of more than 3 % in the United Kingdom. In the small



European Union : Balance Sheet of Cow Milk

m. tonnes	2013	2014	2015	2016 ¹⁾	2017 ²⁾
	EU-28	EU-28	EU-28	EU-28	EU-28
Deliveries of milk	141,9	148,8	152,1	153,0	153,0
+ Imports in milk equivalent	1,2	1,2	1,0	1,1	1,1
- Exports in milk equivalent	15,9	18,0	19,0	18,5	19,8
- Change in stocks in milk equivalent	+0,2	+2,0	+2,5	+1,3	-1,7
Consumption in milk equivalent	127,0	129,9	131,6	134,4	136,0
Consumption per capita	251	256	258	263	266
Self-sufficiency (%)	112	115	116	114	113

1) Provisional 2) Forecast. Source: ZMB. Updated January 2017.

states, such as Luxemburg and Cyprus the growth-rates had been even bigger than in the Netherlands.

The milk deliveries rose in the most of the Member States in the first 10 months of 2016, but decreased in several countries including the United Kingdom, France, Portugal and Sweden. Regarding volume the biggest growth has been observed in the Netherlands, Ireland, Poland and Italy.

Export of dairy products mixed

While global trade in dairy products in general was nearly stagnating in 2016, EU's export of dairy products had mixed developments. A weak Euro was a supporting factor for export, while low oil prices, slower economic growth and weak currencies dampened the purchasing power of important importing countries. Butter export increased and reached the highest level since 2007. Cheese export recovered from the consequences of the Russian import ban. The position in other markets mainly in Asia, Middle East, North-Africa and USA have been strengthened. So, the losses in Russia could be more than compensated. However, export of milk powders was challenging. Purchases of Skimmed Milk Powder by third countries fell substantially below the levels of the two years before and EU lost market share on international market, while intervention stocks grew. Whole milk powder export decreased slowly, while trade in concentrated milk declined sharply. Only whey powder followed its path of growth. Sales of liquid dairy products to foreign countries continued to grow and reached a new all-time-record. Imports of dairy products from third countries remained low. The butter import is continuously substantially reduced compared with historical volumes.

More cheese produced

In the first quarter of 2016 European dairies had still difficulties to process all delivered milk. The consequence was a severe pressure on prices of raw-materials like skimmed milk concentrate and cream for processing. Then, the availability of processing capacity was more relaxed by completing new facilities and decreasing milk

deliveries. Internal demand for products of the white range like liquid milk and fermented products stagnated and production was stable. By the middle of the year most additional milk was converted into cheese. Production of butter and skimmed milk powder increased only slightly, but was substantial in the first months of the year.

Volatile cheese market

The cheese market was growing in 2016 again. The production increased while more cheese was consumed in the single market and export reached a new all-time record of estimated more than 800.000 tons after two years of depression. The losses in the important Russian market was replaced by higher sales to a wide range of countries all over the world. However, the cheese market was very challenging for producers. In the first months of the year, high production levels intensified competition among providers and put severe pressure on prices, which fell below their historical lows and partly below the valorisation by intervention of butter and skimmed milk powder. The extreme low price-level caused a reduction of production of certain cheese types and prices recovered strongly.

Nevertheless, more competition is observed again in the cheese market on international level. Oceania is investing more in new cheese capacities for export than in recent years and the USA had been more present in export markets at the end of 2016 than before.

Butter stronger than other market segments

Once more butter was the firmest segment of the dairy market in 2016. While butter supply increased only slightly demand from internal and external markets increased. Moreover, more milk fat is used for the production of fresh dairy products, cheese and the innovative range of spreads with a high butter content. Nevertheless, the butter market was volatile, but to a lesser extend compared to the cheese market. During a period of heavy supply in the first months of 2016, higher stocks in Private Storage had been built-up than in the previous year. Prices came under pressure until they



have been close to the intervention level. Later in the year, production and availability of cream decreased while export to third countries remained strong. Prices went up strongly and reached all-time records in important Member States. International level prices rocketed, too. Butter supplies at international level had been modest. Imports of EU were considerably lower than in the past.

No growth in whole milk powder

The interruption of growth in the international market of whole milk powder observed in 2015 continued in 2016. International trade failed to catch up to the level of 2014. China imported more than 2015 again, but demand from important countries like Algeria and Venezuela was still reduced. The EU could nearly maintain its market position in the difficult international environment. The internal demand was following the slightly increasing trend of the recent years.

Record stocks of skimmed milk powder (SMP)

Skimmed milk powder was the problem child of the dairy market in 2016. The oversupply observed already in 2015 intensified and led intervention stocks grew up to 350.000 tonnes until the end of September 2016. These are the highest stocks since the beginning of the 1990's. Additionally, PSA (Private Storage Aid) stocks of around 85.000 tons are existing. Prices had been dominated by the intervention-level over large periods of the year. Production increased while export the third countries declined and private stocks came back into the market. The European Commission supported the market by extending the period for intervention, increasing the ceiling for buying-in in intervention at fixed price from 109.000 tonnes to 350.000 tonnes and buying-in via tendering procedures at stable prices. Additionally, the Private Storage Schemes had been extended until end of February 2016. In the last months of 2016 the competitiveness of EU on international markets improved while internal prices increased modestly. The first 40 tonnes of SMP-intervention stocks had been sold via a tendering procedure in December 2016. The international trade in skimmed milk powder decreased in 2016 for the first time since 2007.

Milk prices dropped to lowest level since 2009

The farm-gate milk prices declined in all EU Member States following the low prices of dairy products in the first half of the year. Prices had been only slightly higher than in 2009 in some Member States. In other parts of the world, for example in Oceania, prices fell to similar levels than in 2009, too. The financial situation for farmers was very difficult. In the last months of the year milk prices improved in line with higher returns at international and domestic level.



Outlook

In 2017, the dairy market could return closer to normality than in the two years before. It is likely that milk deliveries in the first half of the year will be lower than in 2016. In the second half, an increase over previous year's level is possible again. In 2017 in total, no increase of milk output is expected. The phosphate regulation in the Netherlands will influence European deliveries due to the outstanding growth in this country in the recent years. While cheese production will increase further, output of butter and skimmed milk powder will decrease. Butter supplies are likely to remain short in relation to external and internal demand. The availability of skimmed milk powder will be continuously sufficient at least. Reducing the stocks will be only possible with booming exports. If export is reluctant, a further increase of stocks is possible. The export in general will be supported by a weak Euro. In the first month of the year lower supply from the Southern Hemisphere is expected due to lower milk production in important countries like New Zealand, Australia, Argentina and Uruguay. Nevertheless, slow economic growth, weak currencies and continuously weak oil-prices could dampen demand from major importing countries.



Monika Wohlfarth,
ZMB GmbH



Trade & Economics in 2016/17

The word of the TEC Chairman

“As we expected, 2016 has become another challenging year. With agriculture and trade policies, very high on the European agenda at all levels (European Commission, Council and Parliament), we have seen a series of reports, impact assessments and consultations, giving the opportunity to the EDA Trade & Economics Committee, CAP Task Force and Trade Task Force to develop inputs and to shape the debates.



Outgoing EDA TEC chairman Jan Maarten Vrij (NZO) with incoming chairman Wim Kloosterboer (FrieslandCampina)

At the same time, as the global dairy market was under pressure, the sector has been confronted with protectionist measures. Instead of compromising the good functioning of the single market by national initiatives, the sector should benefit from a policy environment enabling the market to develop as it deserves, both internally and at global level.

Our successful work as EDA in trade and economics debates has been largely linked in 2016 and over the many years to the outstanding commitment of our outgoing TEC chairman Jan Maarten Vrij.

Jan Maarten always kept in mind our long-term vision. Let's continue in building on and for the future. That will be our guiding line for 2017 as well.”

*Wim Kloosterboer,
EDA TEC Chairman,
Corporate Manager Trade & Dairy Affairs
Royal Friesland Campina*



EU Dairy Policies

Milk Market Situation and EU Commission's reaction

The challenges faced by the EU dairy sector since the Russian ban in August 2014 and the decrease of worldwide demand continued throughout 2016. The EU Commission faced more and more pressure to complement the September 2015 milk package. In March 2016, the European Commission issued a new package of measures which introduced the idea of **voluntary supply management (article 222 of (EU) Regulation 1308/2013, the single Common Market Organisation Regulation)**. This measure **could** enable producer organisations, interbranch organisations and cooperatives to establish voluntary agreements on their production and supply. EDA has been and is against any form of supply management as it would be compromising competition law

and would be a serious divergence from the increasing market orientation of the EU agricultural policy. Apart from this initiative, the EU Commission package included an increase in state aid, a doubling of the intervention ceilings for skimmed milk powder and butter to respectively 218,000 tonnes and 100,000 tonnes, and an additional financial support for the dairy and pig sectors under the promotion scheme.

One more EU Commission package was released in July 2016, which included an EU-wide measure aimed at incentivising a voluntary reduction in production. EUR 150 million has been made available to farmers who wished to commit to reduce their milk production. Four reduction periods were foreseen but 98.9 % of the total amount (1.7 million tonnes) was already applied for at the first reduction period of October- December 2016, over 27 member states. However, signs of milk reduction were already beginning





to appear prior to the milk reduction period. Final results of the scheme will only be available in March 2017 after notification by Member States. Other initiatives implemented by this package were an exceptional adjustment aid, of EUR 350 million, extension of public intervention and private storage for SMP.

2016 was an exceptional year on the protein side. The EU Commission decided, based on the evolution of the market, to increase the ceiling of SMP for intervention up to 350,000 tonnes. Only three buying-in via tender occurred during 2016 with a maximum price of €169.80 for each tender (full intervention price). On the other hand, tenders for fixing minimum selling price for SMP resulted to 40 tonnes out of intervention stocks after 3 tenders at the end of January 2017.

Private Storage was also active in the butter and cheese market. After the reopening of a new Cheese PSA with allocated amounts per country, each member state had the opportunity to apply again in January 2016 for the remaining unused quantities. Ireland, France, Italy, Lithuania, Netherlands, Finland, Sweden and the United Kingdom all applied for the remaining quantities. Both PSA ended on 30th September 2016 at the level mentioned below.

The figures until 29th January 2017 are as such:

- Intervention – SMP:

Buying in at fixed price:

- EU 28 Cumul 2016, since 1st January 2016: **256,026 t.**
- EU 28 Cumul 2015, since 1st March 2015: **40,280 t.**

Tender 1 - fixing minimum selling price for SMP under Regulation No (EU) 2016/2080 (13 Dec 2016):

- Accepted quantities: **40 t.**
- Total volume offered: **19,706.95 t.**

Tender 2 (03 Jan 2017):

- Accepted quantities: **0 t.**
- Remaining quantity for tender 3: **21,962 t.**

Tender 3 (17 Jan 2017):

- Accepted quantities: **0 t.**
- Remaining quantity for tender 4: **21,962 t.**

- PSA SMP:

Article 4(1)a of Reg. (EU) No 948/2014 - storage period max. 210 days

- 23 - 29 Jan 2017: **1,609 t.**
- EU 28 Cumul 2017: **7,269 t.**
- EU 28 Cumul 2016: **43,808 t.**
- EU 28 Cumul 2014-2015, since 1st September 2014: **60,221 t.**



EU Commissioner Phil Hogan with EDA deputy secretary general Bénédicte Masure

Article 4(1)b of Reg. (EU) No 948/2014 - storage period of 365 days

- 23 - 29 Jan 2017: **332 t.**
- EU 28 Cumul 2017: **1,244 t.**
- EU 28 Cumul 2016, since 1st January 2016: **45,348 t.**
- EU 28 Cumul 2015, since 19th October 2015: **9,183 t.**

TOTAL quantity offered into private storage (All storage periods)

- EU 28 Cumul 2017: **8,513 t.**
- EU 28 Cumul 2016: **89,156 t.**
- EU 28 Cumul 2015, since 19th October 2015: **52,062 t.**

- PSA Butter:

- EU 28 Cumul 2016, since 1st January 2016: **143,587 t.**
- EU 28 Cumul 2014-2015, since 1st September 2014: **162,923 t.**

- PSA Cheese:

Admissible quantities for which applications for aid have been submitted (Tons) - Article 2 of Reg. (EU) No 2016/225

- EU 28 Cumul 2016, since 15 January 2016: **52,950 t.**
- Maximum quantity – EU 28: **68,123 t.**



“The shaping of the future CAP has started. As EDA, we are prepared to give our input to the discussions in Brussels and beyond.”

Peter Dawson,
Director Economic Affairs
DairyUK
Chair of the EDA CAP Task Force



Trade & Economics in 2016/17

“Over the past 12 months the MMO has played a role in making market developments more transparent to all actors in the dairy chain. The challenge still seems to be to translate this transparency into reactions at farming level.”



Gérard Calbrix,
Director Economic Affairs ATLA
Chair of the EDA MMO Task Force

Milk Market Observatory (MMO)

With the continuing challenges faced by the dairy sector during 2016, the milk market observatory and its economic board proved once again to be a useful tool for all actors of the dairy chain. It allows a high-level exchange based on robust market data. The main role of the MMO, welcomed by EDA, is to share factual information without discussing policy options or recommendations. These discussions are part of the remit of other groups in the EU Commission such as the Civil Dialogue Group on Milk.

Implementation of the Dairy Package

The EU Commission announced in 2015 that the second report of the implementation of the dairy package would be released in 2016 instead of 2018. The EU Commission asked for input from member states and our EDA position paper was released in June 2016.

The second report was released in November where it shows that the rules introduced in 2012 have improved the position of producers to some extent. It encourages member states to develop Producer Organisations (POs) under their Rural Development Programmes and expand the role of Interbranch Organisations (IBOs). The report concludes that the 2012 Dairy Package should be extended beyond 2020. EDA welcomes the recommendations from this report.

Promotion

The European Commission presented on 26 February 2016 the new promotion schemes for agricultural products that will benefit from an increased budget and will be quite more flexible than the previous one.

The new promotion policy of the European Commission, adopted by Implementing Decision on 9 November 2016, is very ambitious. It aims at alleviating the increased pressure on the EU agricultural sector, due – amongst others – to the lack of awareness of the qualities of EU agricultural products.



The reform concerns the co-financing as well as enlarges the eligibility programs to new beneficiaries and new products. The administration is also simplified. EUR 128.5 million is available, with EUR 85.5 million being allocated for simple programmes and EUR 43 million for multi programmes. The cofinancing rates vary depending whether the promotion is for the internal market (70 to 80%) or the external market (80%). In case of market disturbance/loss of consumer confidence, the EU cofinancing rate amounts to 85%.

In its annual Work Programme for 2016, the European Commission has set priorities. For the internal market: information on EU quality schemes (PDO/PGI/TSG, organic, outermost regions), other innovative programmes such as quality in general, characteristics of EU products, etc., and specific programmes on dairy/milk or pig meat. For 3rd country market, priority is given to China/Japan/South Korea, USA/Canada, Latin America, South East Asia, Africa and Middle East.

School Milk

The EU School Milk Scheme that was introduced in 1977 has gone through several reforms. The last one was initiated early 2014 and consists in the merger of the School Milk Scheme with the School Fruit Scheme to become the “single EU School Scheme for Milk, Fruits and Vegetables”.

The political agreement was finally reached end of 2015 and was successively approved by the European Parliament and Council in March and April 2016. The new scheme will start for the 2017/2018 school year.

The objective of the scheme is two-fold: stabilising the dairy market and shaping children’s healthy eating habits. Emphasis is also placed on the educational dimension aiming at connecting children to agriculture as well as other important aspects such as health, local food chain, organic farming, sustainable production and food waste.

EDA has, from the start, been very active to ensure the continuity of the School Milk Scheme and succeeded in keeping the current eligible dairy products available under the new scheme. Our last main action was to answer the EU Commission’s seven questions to prepare for the implementing and delegated acts. For the dairy sector, EDA was the only organisation to answer, which was underlined by the European Commission.

Agriculture Markets Task Force (AMTF)

Following the announcement in September 2015 by the EU Commission of the creation of an Agriculture Markets Task Force (AMTF), agriculture experts, led by former Dutch Agriculture Minister Cees Veerman met 8 times through 2016. Depending on the AMTF agenda points, EDA prepared several papers for this Task Force. The EDA positions covered market transparency, futures markets and contractualisation.





In November 2016, the AMTF issued its independent report with the following recommendations:

- Transparency: compulsory notification of prices for intermediate steps of the chain, beyond farmers, in time and in a standardised way
- Unfair Trading Practices: legislation and effective implementation in the member states
- Clarification of collective actions as regards competition rules
- Better use of financial instruments (European Investment Bank, export credits)
- Risk management (futures): awareness and training

Members of the task force presented the report to the EP COMAGRI in January 2017 and it is expected that the EU Commission will release some legislative proposals in the second half of 2017.

CAP post 2020

Over the past twelve months, EDA continued to be active in the discussions on CAP post-2020. In January 2016, the CAP TF organised a brainstorming session. Dr. Rolf Jongeneel, a senior scientist & market and policy analyst at Wageningen University, presented his initial views of the future policy options for the CAP. His team at Wageningen University released later in 2016 a full proposal where the CAP should develop into a broader Common Agriculture & Food Policy. The second half of the event introduced the EU Commission's view on the rural development. These presentations and the following discussions in the CAP TF helped to shape a first EDA position on the future of the CAP from a dairy perspective.

The EU Commission announced that a consultation would be organised in February 2017 on the future of the CAP. We will use this opportunity to share our vision on the CAP post 2020.

Functioning of the Food Supply Chain

High Level Forum for a Better Functioning Food Supply Chain

In January 2016, EU Commissioner Elżbieta Bieńkowska appointed the members of the High Level Forum for a Better Functioning Food Supply Chain. EDA chair Michel Nalet has accepted to become a member of this new High Level Forum that will assist the EU Commission to develop the European industrial policy in the agri-food sector.

This appointment highlights our overall EDA strategy to better reflect in our work the new set up of the EU Commission and to shape the frameworks our industry is operating in.

At the kick-off meeting on 15 December 2016 EU Commissioner Elżbieta Bieńkowska spoke about "New frontiers for food business in Europe", Mr Xavier Prats-Monné, director general of DG Santé,

elaborated on "A food supply chain closer to the consumers" and EU Commissioner Phil Hogan concluded the meeting on "Maximising the synergies between various policy areas: Lessons learned from the Agricultural Market Task Force Report" (see above).

The two topics for discussions were about the types of actions needed to address Unfair Trading Practices (UTPs) in the food supply chain and the issues considered as the main priority for fostering the competitiveness of the EU food supply chain.

In this meeting, the work programme of the Forum for the next 3 years was adopted: although not limited to these two topics, the Forum will concentrate on "Fair and efficient B2B trading practices, Competitiveness and new opportunities, and Price transparency". A so-called 'Sherpa group' will regularly hold meetings with relevant expert groups to progress towards deliverables. EDA will of course contribute along the process.

Unfair Trade Practices: new reports

At the end of January 2016, two reports on unfair trade practices were launched simultaneously:

- the 2nd report on the Supply Chain Initiative (SCI) claiming that the SCI creates the conditions for a better functioning supply chain, has more participants even though it acknowledged its disappointment of not having the major farming organisation on board.
- the EU Commission report on unfair business to business (B2B) practices which mainly concludes that the EU Commission does not see the added value of a specific harmonised regulatory approach at EU level at this stage.

Unfair Trading Practices in the B2B Food Supply Chain is also on the agenda of the European Parliament that adopted on 6th June 2016 a report calling for stricter rules on unfair trading practices in the food chain.

In their report, MEPs ask the EU Commission to put forward proposals against unfair trading practices in the food supply chain, so as to ensure fair earnings for farmers and a wide choice for consumers. The aim is to guarantee fair and transparent trade relations through the food chain. MEPs are also of the opinion that fair trading could help to prevent overproduction and food waste. The report also asks that the Supply Chain Initiative (SCI) be modified to ensure that organizations can submit anonymous complaints.

The 3rd annual report of the Supply Chain Initiative (SCI) was presented in the European Parliament COMAGRI on 24 January 2017. Its Governance Group strongly asked policymakers to acknowledge the claimed progress made by the SCI and called once again farmers' organisations to join the SCI.



Trade & Economics in 2016/17

Trade and Market Access

Bilateral Trade Issues and Free Trade Agreement (FTA) Negotiations

Our EDA Trade TF has been shaping our EDA positions on bilateral trade issues and Free Trade Agreement (FTA) negotiations. With constant contact and exchanges with the relevant services of the European Commission, we helped to secure the interests of our sector. One focus point in 2016 was our “EDA Trade Day” on 30th March where EDA members had the opportunity to exchange with representatives from the Mexican and US Missions, and high level civil servants from DG Agri, DG Trade and DG Santé.

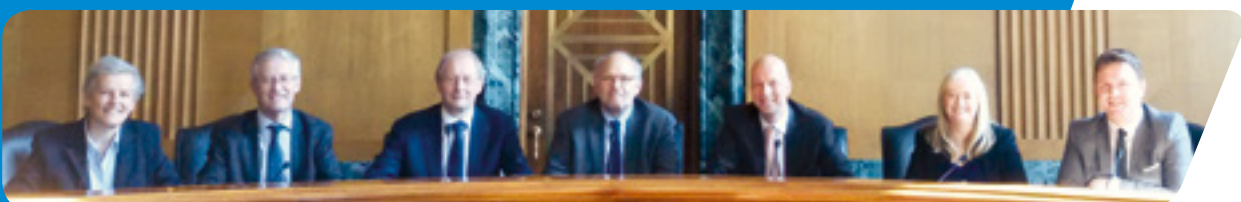
Both EU Commissioner for Trade, Cecilia Malmström, and EU Commissioner for Agriculture, Phil Hogan, have been very committed and active in safeguarding and improving EU exports of agriculture products.

The EU Commissioner Cecilia Malmström’s ‘Trade for All’ initiative from 2015 has started to materialise and bear fruits, with an agreement reached on organic products with **Chile**, the ongoing negotiations for the modernisation of the FTA with **Mexico**. Significant progress has also been made on the forthcoming FTA with **Japan**, which is scheduled to be finalised in 2017. The signing of the EU-**Canada** Free Trade Agreement (CETA) is a monumental achievement, which will offer the EU dairy sector the opportunity to double its existing foothold in the Canadian market for certain products, such as cheeses and enable SMEs to fully capitalise from trade liberalisation. The EU Commissioner for Agriculture, Phil Hogan, undertook diplomatic missions around the world to promote EU agricultural products. In February 2016, EU Commissioner Phil Hogan started his ‘diplomatic offensive’ with a mission to Mexico and **Colombia**, accompanied by a delegation from the European agricultural & food sector.

Annual EDA door knock in Washington

Early May 2016, an EDA delegation met in Washington with the US representation of the European Commission, agricultural attachés of several EU Member States, the main dairy farmers’ organisation (National Milk Producers Federation), the US Dairy Export Council (USDEC), US Department of Agriculture, US Trade Representative, Food and Drugs Administration and representatives of the Agriculture and Trade committees in the House and Senate. Just a couple of days after the 13th round of Transatlantic Trade and Investment Partnership (TTIP) negotiations, the EU – US free trade agreement was high on the agenda, but the EDA delegation stressed that while supporting the conclusion of the negotiations, the top priority is to get – within or outside the FTA – an agreement on equivalence to address both Grade A and the challenges of the implementation of the Food Safety Modernisation Act (FSMA). EDA also stressed once more that the European Union is and must be considered as a single entity, with all member states complying with the same EU food safety legislation and implementing it the same way.

This visit also gave the opportunity to discuss inter alia the Dairy Margin Protection Program, the additional import duties on butter and cream triggered in 2015, the Dairy Import Assessment, milk substitutes, whey and milk permeate Codex standards, the two major issues for the US dairy industry being equivalence and Geographical Indications (GIs).



EDA chair Michel Nalet (centre) leading the EDA delegation at our 2016 Washington door knock



In June 2016 EU Commissioner Phil Hogan led a delegation to China and Japan, followed by a mission to **Hong Kong, Vietnam and Indonesia**, in November, where he was accompanied by EDA Board members Riitta Brandt (Valio, FIN) and Kasper Thormod Nielsen (Arla Foods, DK).

On a different note, 2016 proved to be a challenging year for the **Trans-Pacific Partnership (TPP)**, where the US elections added effectively a break on the completion of the deal. 2017 might prove to be a make or break year for the TPP. Nevertheless, even with the potential exclusion of the US (where the majority of the dairy sector opposed the TPP), the remaining eleven partnering countries include dairy giants like Australia, New Zealand and Canada, still have the potential to influence the global dairy markets.

Similarly with the TPP, the US – EU trade talks (TTIP – **Transatlantic Trade and Investment Partnership**) have reached a standstill. The EU is willing to continue negotiations but the position of the US is for the time being unclear.

In 2016, the EU Commission published two studies, which highlighted the benefits of free trade for the economic prosperity of the EU. In November, the EU Commission published the “Cumulative economic impact of future trade agreements on EU agriculture”, which offered valuable information on the economic effects of 12 future potential FTAs for which the EU is in the process of negotiations or close to finalising. Although 70% of the EU Agri-food sector was not represented, the study concludes that the EU dairy sector would benefit the most from FTAs in terms of tariff liberalisation. The forecasts for cheese and SMP look particularly favourable. Growth rates are expected to be positive for production, producers’ prices and export levels.



EDA Chair Michel Nalet: “EU Commissioner Hogan’s initiative provides a really valuable support to our efforts to market our European products in third countries. The personal commitment of Phil Hogan opens possibilities at all levels and we are very grateful for his leadership in this diplomatic offensive”.



EU Trade Commissioner Cecilia Malmström with EDA chair Michel Nalet and EDA board members Riitta Brandt (Valio, Finland) and Jonas Carlberg (Dairy Sweden)

In December 2016, the EU Commission presented the findings of the joint EU-ITC survey “Navigating non-tariff measures – Insights from a business survey in the European Union”. The study, which collected data from 8,000 business across all 28 member states, distinguishes between non-tariff measures, such as security, sustainability and privacy, which are legitimate national concerns, and non-tariff barriers, which are trade distorting. Furthermore, the study offers valuable insight for SME on how to identify and overcome these barriers. The survey can also prove to be a useful tool/blueprint for the future FTAs negotiations of the EU.

Below is an exhaustive list of countries where progress has been made in trade negotiations or trade issues during 2016:

ASEAN

Free Trade Agreement negotiations have taken place in a bilateral format with countries of South East Asia (ASEAN) since December 2009. In its Trade Communication “Trade for all”, the EU Commission’s intention is to use bilateral agreements between the EU and ASEAN members to restart negotiations for an EU FTA with ASEAN.

For **Singapore**, the first ASEAN country to reach a bilateral trade agreement with the EU, the negotiations talks have been finalised already back in 2013. The formal approval process is still pending due to divergent views on the competence to conclude formally the agreement. The long-awaited judgement of the European Court of Justice (ECJ) is expected for 2017.

On 21 December 2016, a first opinion was published proposing that the EU-Singapore FTA is not the sole competence of the EU – which would mean that 38 national and regional parliaments across the Union should be involved in the ratification process.

Once the FTA with Singapore is ratified, the EU dairy sector will have the opportunity to export more to a market valued at more than EUR 140 million in 2015.

Negotiations with **Vietnam** have been officially concluded in 2015. Vietnam is an important market for the EU dairy sector, valued more than €100 million in 2015. A legal check is currently carried out and we do hope its entry into force in 2018.



Trade & Economics in 2016/17

Negotiations with **Malaysia** and **Thailand** are still at a standstill respectively since 2013 and 2014. The EU Commission has implemented its 2015 intentions of starting FTA negotiations with **the Philippines** and with **Indonesia**. Negotiations with the Philippines were launched in December 2015. In July 2016, the negotiations for a Comprehensive Economic Partnership Agreement (CEPA) with Indonesia were launched.

EDA has responded on the EU Commission's questionnaire on a Free Trade Agreement with Indonesia in November 2016, asking for tariff liberalisation and lifting of non-tariff barriers.

EDA assessed positively the potential of these FTAs through an EU Commission consultation. For Philippines, the EU dairy sector will have the possibility of enhancing its market access in a market valued at almost EUR 120 million in 2015. The same holds true for Indonesia where the dairy market is estimated to worth for EU exporters at more than EUR 230 million in 2015.

Canada

2016 has been a significant and turbulent year for the EU-Canada Free Trade Agreement CETA (Comprehensive Economic and Trade Agreement). After long negotiations and the appeasement of all stakeholders, the EU and Canada finally signed the agreement on 30 October 2016. The final ratification is expected to be concluded early 2017.

Currently the EU's exports of cheese to Canada are valued at almost EUR 120 million. The existing quotas no longer reflect current Canadian consumer demand and their presence proved to be an impediment to the growth of the cheese sector.

Over summer 2016, the Canadian authorities launched a consultation on the tariff-rate quotas administration for the new cheese quotas from the EU. We have succeeded through teleconferences to come to a consensus as EU dairy industry and to reply to this consultation. CETA will help EU agricultural exports, turn the page and enter a new era of advanced trade cooperation with Canada. For the EU Dairy sector, that implies an increased presence of European products in the Canadian market. EU Trade Commissioner Cecilia Malmström stated that for cheese "we have negotiated a quota of 18,500 tonnes that will allow us to double our existing foothold in Canada. This achievement would make that market alone worth 5% of our cheese exports."

However, at the same time of the provisional signature of the CETA, Dairy Farmers of Ontario and the Canadian Dairy Processor associations concluded in July 2016 an agreement in principle which goes against the principles of the FTA. The agreement aims to lower the price of protein concentrates under a class VI pricing in order to replace imports by domestic products. It also aims to increase the price for products containing milk fat to compensate the income loss for farmers. We took part in a global alliance condemning this trade distorting measure conflicting with WTO rules. Canada is expected to expand it nationally beginning of February 2017.

China

In November 2016 China published a new draft implementing Rules of the Food Safety Law. Prior to the deadline on the 14 November 2016, EDA sent comments on registration and number of recipes for Infant Formula to the authority responsible for inspection and a further request for clear definitions.

China is also updating its national standards based on international standards. Updates for products such as infant formula, cheese, lactose, sodium caseinates and food for special medical purpose have been submitted for international comments. We have been following closely this process and gave the European dairy industry's input at every stage of the consultation.

As regards to free trade discussions, we have urged the EU Commission to invest time and energy in opening up the Chinese markets for European dairy products. EU Commissioner Phil Hogan's mission to China in June 2016 was greatly appreciated. With the EU Commission's intention to pursue negotiations with "Oceania" (see below), EDA has insisted on a level-playing field on the world market and opening negotiations with China is an important step in that direction.

Central and Latin America

The accession of **Ecuador** to the EU-**Colombia** and **Peru** free trade agreement was concluded in November 2016, increasing the reach of the EU within the **Andean Community** market. **Bolivia** has also the possibility to apply for accession to the Andean community trade pact.

Implemented since 2000, the EU and **Mexico** have decided to modernise their free trade agreement with a focus on trade facilitation and liberalisation of tariffs. The negotiations for the modernisation of the FTA began in October 2016. A main area of focus is the tariff liberalisation of the agricultural sector, which was excluded from the negotiations when the FTA was first implemented. In 2015 the EU's dairy exports to Mexico were valued a little over EUR 95 million. Tariff and non-tariff liberalisation will offer the opportunity to the EU dairy sector to expand in the Mexican market. In January 2017, we are in the process to elaborate the EDA answers to the EU Commission's second questionnaire on EU-Mexico trade relations.

EU Commissioner Cecilia Malmström had announced in 2015 that the EU Commission is assessing the possibility of the modernisation of the association agreement with **Chile**. In April 2016, an agreement was reached on trade in organic products. EU and Chile will mutually recognise their equivalent control systems on the production of organic products.

The EU's organic sector has experienced continuous growth over the last 10 years, averaging a growth rate of 5.5% per annum. Organic agriculture covers nearly 6% of the EU's agricultural land. The agreement is expected to boost the export of EU organic products to Chile.





In May 2016, EDA sec gen Alexander Anton was invited to a meeting of the Council of the Agricultural Ministers of the South (CAS) and to exchange with Mr Tabaré Agerre, the Minister of Agriculture of Uruguay, who holds the Presidency of Mercosur and of the CAS.

Regarding **Mercosur** which full members are Argentina, Brazil, Paraguay, Uruguay and Venezuela (which was suspended on December 1, 2016), both parties have exchanged initial market access offers in May 2016 and in October the 16th negotiating round was concluded. A number of topics were debated, including: trade in goods, customs and trade facilitation, technical barriers to trade, SPSs, and subsidies. Both sides publicly announced their commitment to further the negotiation process. The next round will be held in Buenos Aires in March 2017.

Japan

Early 2015, EDA communicated to the EU Commission its position on the EU-Japan negotiations recommending that it should be concluded swiftly in order to have the most beneficial deal for the EU and Japanese dairy sectors. There is a growing demand for dairy imports in Japan as a result of declining domestic production. Over the past decades, the growing participation of 'Oceania' in the Japanese market has been to the detriment of EU dairy exports. In 2013, out of the main dairy exporters to Japan, New Zealand had a market share of 75% for Butter, 39% for Cheese and 33% for Skimmed Milk Powder (SMP). Comparatively, the EU represented 11% (Butter), 18% (Cheese) and 13% (SMP). Cheese products are the main EU dairy exports to Japan and were valued at around EUR 265 million in 2015.

The 17th round of negotiations took place in Brussels in September 2016. The negotiations have reached a mature stage in all sectors and markets access offers have been exchanged. In light of the recent impediments to the Trans-Pacific Partnership final stages of negotiation and finalisation (see below), Japan expressed willingness to conclude the FTA with EU as soon as possible. In December 2016, it was announced that the finalisation of the trade agreement will be postponed until January 2017. The final stages of negotiations will feature heavily around the much-needed common acknowledgment on the market access pillar. Reaching consensus on the automobile and agriculture sectors is a necessary prerequisite for the complex negotiations to conclude. The EU is

willing to fully liberalise its automobile market, providing that Japan is willing to grant EU increased access to its agriculture market, to enhance exports of dairy products, beef, pork and wine.

Georgia, Moldova and Ukraine

Both Georgia and Moldova have officially since July 2016 implemented an Association Agreement with the EU and the Deep and Comprehensive Free Trade Area (DCFTA) entered into force. In the case of Ukraine, the DCFTA has been provisionally applied since January 2016.

Australia, New Zealand and the Trans-Pacific Partnership (TPP)

In its new trade strategy, the EU Commission announced its intention to start FTA discussions with **Australia** and **New Zealand**. At an early stage, EDA has underlined the sensitivities of the agricultural sector in this context with EU Commissioner Phil Hogan, EU Commissioner Cecilia Malmström and their teams. These sensitivities have been taken on board of the new trade strategy. As EDA, the voice of the European dairy industry, we are pushing for the EU to be on a level-playing field with its global trade partners and competitors. The EU must prioritise negotiations with third countries which are important markets for the EU agriculture such as ASEAN, Japan and China.

In July 2016, we published our "**EDA Trade Focus on New Zealand**" and we formally asked the EU Commission to keep Australia and New Zealand separate as both have markets with very different interests.

In 2016, the EU Commission launched an online public consultation to assess the impact of the potential FTAs with Australia and New Zealand. The EU Commission acknowledged that both New Zealand and Australia have already a plethora of implemented FTAs, which hinder the prospects of the EU's economic operators to access and compete effectively in these markets. Another point of importance, which the EU Commission fully recognises is the EU agricultural sensitivities that need to be taken into account.



Australian trade minister Steven Ciobo with EDA secretary general Alexander Anton



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In October 2015, the 12 partners of the Trans-Pacific Partnership have come to a political agreement ending the negotiations for a Pacific region FTA. The deal was on track to be ratified in 2016 and to enter into force in 2017. As mentioned earlier on, given the recent political developments in the US, the TPP is currently on hold.

South Korea

2016 marks the fifth anniversary of the EU-South Korea Free Trade Agreement (FTA), which took effect in July 2011. It is the EU's first trade deal with an Asian country and so far, it has proved to be a success story. EU Commissioner Cecilia Malmström, stated in her speech of 8 December 2016 that *"since our Free Trade Agreement with South Korea, our agricultural exports to Korea increased by 37% [...] Dairy exports increased by 27%"*. EU exports, especially in cheese, have magnified since the FTA took effect, reaching almost EUR 270 million.

Tunisia

Building of the existing Association Agreement, the EU and Tunisia concluded the first negotiating round for a Deep and Comprehensive Free Trade Area (DCFTA), in April 2016. Agriculture features heavily in the negotiations, along with SPS measures and the elimination of technical barriers to trade.

In the first quarter of 2017, we will share our insights, concerns and wishes by replying to the EU Commission's questionnaire on the deep and comprehensive free trade area with Tunisia.

Turkey

In December 2016, the EU Commission requested from the EU Council a mandate to launch talks with Turkey in order to modernise the current 20-year-old EU-Turkey Customs Union. The present arrangement excludes any arrangement on agriculture, services and public procurement.

United States of America

The 15th negotiating round on the TTIP was concluded in October 2016. Currently the TTIP is surrounded by uncertainty, as the final round with the Obama administration in December was not concluded. The new US President Donald Trump has expressed his discontent with the TTIP, adding further pessimism to the air. Despite the problems, bilateral technical negotiations are still ongoing. The overall structure of the SPS chapter was agreed and some Articles (import checks, audits, equivalence, regionalisation, SPS Committee), are close to be finalised. The US insisted on confidentiality, making it impossible for the full detail to be made public yet.

Controversy still surrounds articles relating to certification and emergency measures, as well as US proposals on modern agriculture technology. But there are efforts for establishing systems recognition under the Food Safety Modernization Act (FSMA).

The US and the EU exchanged views and questions on the evaluation of the certification process. So far, the US is eligible to export all categories of food to the EU, although certain products require veterinary certificates. It is still unclear what further concessions the EU will be requested to offer.

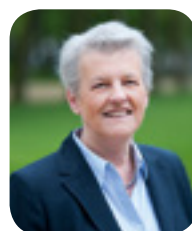
Simplification of certification, in particular for composite foods, is on the short-term scope. The US repeatedly assured the EU Commission that trade will not be interrupted when the new legal provisions enter into force in April 2017.

The EU Commission has no update on Grade A inspection reports of France, Holland and Ireland and, so far, EDA has not been informed about the date of publication of these reports.

WTO – A year after the “Nairobi Package”

Opening the WTO Public Forum 2016, Roberto Azevêdo, Director-General of the WTO, recalled the importance of refocusing the debate on trade: *"It is the best anti-poverty tool."* Also present, EU Commissioner for Trade, Cecilia Malmström, referred to the EU strategy paper published last year 'Trade for All, Towards a more responsible trade and investment policy': *"Trade must be more effective, more value-based, and more transparent in order to make sure that people who do not trust trade negotiators feel involved"*, she kept repeating that no free trade agreement negotiated by the European Union would decrease the standards or consumer protection.

The next WTO Ministerial Conference will be held in Buenos Aires in December 2017. Argentina will be the first South American country to host the biannual meeting. Although the main areas of focus are yet to be decided, the persisting issues will feature prominently on the negotiations. Public stockholding for food security purposes and the special safeguard mechanism for agricultural products are two issues remaining from Nairobi, where the G-33 will request flexibilities in opening up their agricultural markets and will push for special and differential treatment for developing countries to be maintained.



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