

ANNUAL REPORT 2025





Director General's insight

Looking back at 2025, our sector once again demonstrated its remarkable ability to adapt, innovate, and perform.

After several challenging years, the European savoury snacks sector has emerged stronger, more agile, and more ambitious, with 2026 promising even further opportunities.

Competitiveness is back at the top of the EU agenda, and this shift plays to our strengths. As policymakers refocus on industrial resilience and a well-functioning Single Market, our sector is well positioned to showcase the economic, social, and cultural value that savoury snacks bring to Europe. At the same time, we continue to invest in sustainability – not because regulations demand it, but because it makes good business sense and meets the expectations of consumers and retailers alike.

In 2025, ESA achieved significant advocacy successes thanks to the expertise and engagement of our members. From promoting smart, workable legislation that facilitates our members' work, we helped ensure that the voice of our industry was heard at all relevant levels. These achievements are a testament to our collective strength and to the credibility our association has built over many years.

As we enter the next year, we have a unique opportunity to elevate our sector's visibility further, reinforce our role in shaping Europe's food landscape, and continue driving progress on sustainability, innovation, and growth.

I hope you enjoy reading about this year's milestones.

My team and I look forward to working with all of you to make 2026 another successful year for our wonderful sector.

Sebastian Emig

Sebastian Emig
Director General*
European Snacks Association
*in his capacity as permanent representative of PrimeConsult BB, S.L.



Highlights of the year

Another eventful year for the European Snacks Association and the savoury snacks sector. This timeline looks back at the last year's landmark moments.

1

FEBRUARY

A Taste of Success: The European Snacks Association and the Savoury Snacks Industry

With growing consumer demand for sustainable and nutritious products, and as the EU grapples with ambitious climate and health targets, the European savoury snacks industry is at a pivotal moment, writes **Sebastian Emig**, Director General of the European Snacks Association.

potato chips, nuts, popcorn, crackers, and pretzels. The sector generates over €40 billion annually and directly employs more than 40,000 jobs, with more than a hundred production sites across the continent. ESA members, which include leading manufacturers operating worldwide and SMEs, recognise the industry's importance in the global marketplace. Collectively, they embody a

proportion during a move right, or pressing a handful of nuts for a snack. Savoury snacks are deeply woven into the fabric of European culture. Their general appeal lies in their ability to bring people, offering moments of joy and indulgence.

Moreover, the variety of snacks available today – from traditional cheese crisps to innovative plant-based alternatives – reflects the diversity of European consumer tastes and the industry's commitment to innovation.

ESA editorial piece in The Parliament Magazine

Intended for policymakers in the EU institutions, especially newcomers to Brussels after the elections, the article included our key messages on health, nutrition and sustainability

2

APRIL

TARIFFS

Joint letter on the potential inclusion of almonds on the EU target lists

After responding to the European Commission consultation, ESA sent a Joint letter with FRUCOM, CAOBISCO and BDSI to express concern on the potential inclusion of almonds on the EU target lists, in the context of the EU-US trade disputes

3

MAY

Targeted Stakeholder consultation on 3MCPD

ESA responded to a targeted stakeholder consultation on MLs for the sum of 3-MCPD and 3-MCPD esters and of glycidyl esters issued by the Commission

4

MAY

Celebrating the International Day of Potato

Together with the European potato value chain, ESA organised an event in Brussels to celebrate the humble potato's cultural, economic, and nutritional importance

5

JUNE

ESA's annual acrylamide data collection

ESA formatted and submitted to EFSA over 7,794 results for acrylamide in sliced potato crisps as part of its annual call for data

6

JUNE

10th edition of Share a Snack in Brussels

ESA celebrated 10 years of Share a Snack in the crowded Place Luxembourg, steps away from the European Parliament

7

JUNE

ESA Snack Production Course

Part I "Chips & Snacks: Raw materials to formed products" took place in Budapest, Hungary

8

JUNE

ESA data on food additives in food and beverages intended for human consumption

ESA formatted and submitted to EFSA over 2,000 results (analytical & use level data) for Lactic acid (E 270), Sodium lactate (E 325), Calcium lactate (E 327) and Glycerol (E 422)

9

OCTOBER

Priorities of the European Snacks Association (ESA) in relation to the European Commission's simplification and better regulation agenda (October 2025)

Prioritising safety, innovation and competitiveness in the EU food and drink sector

The European savoury snacks sector welcomes the European Commission's commitment to streamline and modernise EU legislation to improve competitiveness and reduce unnecessary burdens for businesses.

As a committed, transparent and dynamic industry, actively engaged in the transition towards more sustainable food systems, we believe that better regulation and simplification must go hand in hand with maintaining high food safety standards and fostering innovation.

Savoury snacks manufacturers and their suppliers, including many SMEs, needs clearer, more proportionate rules to grow, invest and remain competitive. As outlined in recent reports, further protecting and strengthening the Single Market will be a determining factor of success. In this document, we outline several areas where targeted actions on food law and related legislations could reduce unnecessary administrative burdens, improve legal clarity, and introduce proportionate regulatory measures.

ESA contribution to the European Commission simplification exercise on EU food law

ESA developed and submitted a clear and structured list of priority regulatory improvements to support the sector's competitiveness

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OCTOBER

2 Chips & Snacks

ESA Snack Production Course

Part II "Chips & Snacks: Formed products to end-of-line" took place in Vienna, Austria

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NOVEMBER

STAKEHOLDER FORUM

ADVANCING RISK ASSESSMENT TOGETHER: FASTER DELIVERY, UNCOMPROMISED SAFETY

24 November 2025 Brussels, Belgium

EFSA Stakeholder Forum 2025

ESA participated to the 8th edition of the EFSA Stakeholder Forum "Advancing Risk Assessment Together: Faster delivery, Uncompromised safety"

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NOVEMBER

MAKING SNACKING MORE SUSTAINABLE

The new Sustainability Report is served!

Publication of ESA new sustainability report

The report showcases the sector's progress across all dimensions of the transition towards a more sustainable food system, with numerous concrete initiatives led by ESA members

Focus on events

A programme of capacity building activities which offer outreach, education, business opportunities and networking.



SNACK PRODUCTION COURSES

ESA’s programme of snack and nut production education courses are designed to provide delegates with a thorough, well-rounded and interactive grounding on industry best practice and the latest applications of new technology delivered from acknowledged unbiased experts.

Snack production courses are a great opportunity for all production and marketing-oriented personnel to meet, network, exchange good practices, share their own experiences or challenges with peers as well as with expert industry speakers.

2025 has been a particularly busy year with two courses taking place in Spring and Autumn!

In June, delegates met in Budapest (Hungary) for a 3-days course focusing on chips and snacks (part I) working through all the steps, from raw materials to formed products. The course successfully combined classroom lectures from leading experts in the savoury snacks industry with fun networking activities which enabled delegates to also experience the beautiful of Budapest.

In October, delegates met in Vienna (Austria) for the second part of the course, this time focusing on formed products to end-of-line. Participants learned, amongst others, about the latest practical applications of new technology for the production of potato chips, extruded, pelleted, sheeted and baked snacks, including food safety aspects. The updated content also featured a new exciting hands-on flavour workshop where delegates got the chance to create their own delicious snacks and compete against their colleagues.



SHARE A SNACK

In June 2025, the ESA team again took over the Place Luxembourg in front of the European Parliament in Brussels to celebrate the 10th edition of the iconic “Share a Snack” event.

As every year, a happy and enthusiastic crowd - including collaborators of the European Parliament - had the chance to test its knowledge on the sector with a short interactive quiz. The Place was alive with flavour, laughter, snack-loving energy (and a special snack crossword)!

Thanks to the generosity of ESA members, guests from across the EU bubble sampled bites from a variety of savoury snacks, including latest innovations in terms of new ingredients, shapes and flavours.



INTERNATIONAL DAY OF THE POTATO

At the occasion of the International Potato Day (30 May), ESA joined forces with other organisations of the potato value chain to organise an event in Brussels to celebrate an extraordinary crop that feeds people all over the world – and which is also the cornerstone of some of the world’s favourite savoury snacks!

Under the theme “From seed to fork”, the event explored how the potato value chain is addressing climate resilience, food security, sustainability and innovation.

Speakers highlighted Europe’s leadership in potato production, trade, and innovation and the importance of boosting the sector’s competitiveness. They stressed the importance of collaboration across the value chain, the need for supportive policies, and continued investment for a thriving, sustainable European potato sector.



ANNUAL GARDEN PARTY OF THE EUROPEAN PARLIAMENTARY ASSOCIATION

In July 2025, ESA participated to the traditional Annual Garden Party organised by the European Parliamentary Association, and for the first time in the beautiful Parc de l’Orangerie in Strasbourg.

More than 500 guests from the European Parliament and various European institutions had the opportunity to present, discuss and taste some of the latest product innovations in the world of savoury snacks.

Working groups

Our dedicated committees are at the forefront of the issues to keep members abreast of regulatory and legal developments.



ECR EC REGULATORY WORKING GROUP

The EC Regulatory Working Group’s (ECR) mission is to protect and promote the interests of the sector, by providing technical expertise and input to the EU policy process and communicating positions to key decision-makers.

In 2025, engaging with EU officials and relevant stakeholder remained a central focus for the ECR, especially concerning food contaminants. Food safety continues to be the top priority for the food industry. To support this commitment, the ECR facilitated the exchange of research, best practices, and initiatives on food safety in a collaborative and open environment.

On acrylamide whilst there were limited regulatory developments from the Commission, ESA still managed to collect and submit industry data to EFSA in preparation for discussions in 2026 (over 7,794 observations submitted in total). Work also started in earnest on glycoalkaloids and furan.

Moreover, the ECR contributed to the targeted stakeholder consultation on maximum levels for the sum of 3-MCPD and 3-MCPD esters and of glycidyl esters issued by the Commission. Lastly, ECR actively contributed to the EFSA open call on food additives analytical & use level data in food and beverages intended for human consumption.



PAC PUBLIC AFFAIRS & COMMUNICATIONS WORKING GROUP

The main task of the Public Affairs and Communications Working Group (PAC) is to shape the reputation of the industry as a responsible, credible and committed partner in the public and political debate.

Building on the momentum created by the European Parliament elections and the appointment of a new European Commission, the group continued to strengthen the association’s reputation throughout 2025. This was achieved through targeted editorial contributions and media interviews, sustained engagement with key stakeholders, and the organisation of dedicated events.

In parallel, the group focused on identifying opportunities arising from the European Commission’s new strategic direction, aimed at enhancing the competitiveness of European businesses and simplifying the regulatory framework. Working closely with other ESA working groups, the secretariat developed and submitted a clear and structured list of priority regulatory improvements to support the sector’s competitiveness.

The group also maintained close monitoring of nutrition and health policy developments, with particular attention to debates around food processing and innovation. In this context, the ESA position paper on reformulation was updated to reflect the evolving political landscape, placing greater emphasis on product innovation and the role of food processing in delivering safe, nutritious and sustainable products.

In addition, the group contributed to the publication of ESA’s second sustainability report, showcasing the sector’s progress across all dimensions of the transition towards a more sustainable food system and highlighting numerous concrete initiatives led by ESA members.

Looking ahead to 2026, the group will continue to strengthen ESA’s visibility and credibility among decision-makers and work towards a legislative and regulatory environment that supports the economic development and performance of the sector.



NPWG NUT PROCESSORS WORKING GROUP

The Nut Processors Working Group (NPWG) brings together professionals from across the global supply chain for snack nuts and plays a key role in addressing the sector’s concerns and interests.

In 2025, the NPWG actively monitored the evolving EU-US trade relationship, collaborating with relevant stakeholders to promote a fair and negotiated resolution avoiding extremely negative impact on EU industry and consumers. Moreover, the group contributed also to a series of targeted stakeholder consultations issued by the Commission, particularly on the list of products which could be subject to possible commercial policy measures.

One of the NPWG’s key priorities is the ongoing discussion of aflatoxins and alternaria toxins at both EU and Codex levels, particularly given the high number of RASFF alerts issued throughout the year. The NPWG continues to advocate for the application of appropriate standards, tailored to the specific commodity and its origin.

Lastly, NPWG has closely monitored the implementation of Regulation (EU) 2017/625 on Official Controls and actively engaged with EU officials to ensure consistent implementation of the Regulation.



SUST SUSTAINABILITY WORKING GROUP

The Sustainability Working Group’s (SUST) main role is to discuss the sector’s approach to environmental and sustainability issues impacting the savoury snacks sector.

In line with the European Commission’s new priorities, the group closely followed and analysed proposals aimed at simplifying corporate sustainability reporting and due diligence requirements for European companies. Alongside these discussions, the secretariat developed dedicated guidance to support members in managing risks and meeting expectations across their value chains, by identifying shared principles and practical approaches.

The group also monitored key developments in environmental labelling policy, including complex negotiations on the Green Claims Directive and the Empowering Consumers for the Green Transition Directive, which will enter into force in 2026 and require early preparation by companies.

Following the adoption of the Packaging and Packaging Waste Regulation (PPWR), the group continued its work to clarify several outstanding issues in order to ensure legal certainty and operational visibility for members. In this context, ESA co-signed several joint statements calling on the European Commission to issue timely and specific guidance, notably on waste sorting instructions labelling and the planned restrictions on certain packaging formats.

Looking ahead to 2026, the group will continue to closely monitor developments related to the PPWR secondary legislation and remain vigilant regarding any new initiatives affecting environmental legislation, ensuring that members are kept fully informed of relevant regulatory developments.

Who we are

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



200

Companies
membership



40

Countries
represented



80%

European
branded savoury
snacks market

Headquartered in Brussels, we are recognised as the voice of the industry before the European decision-makers, and other key stakeholders since 1961.

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

WHAT WE OFFER

A wide range of services and benefits for you and your business.

- ✓ Advocacy support
- ✓ Access to information
- ✓ Networking opportunities
- ✓ Education
- ✓ Involvement in working groups



The voice of the savoury snacks industry in Europe

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