

# MAKING SNACKING MORE SUSTAINABLE

The contribution of the European savoury snacks  
industry to more sustainable food systems

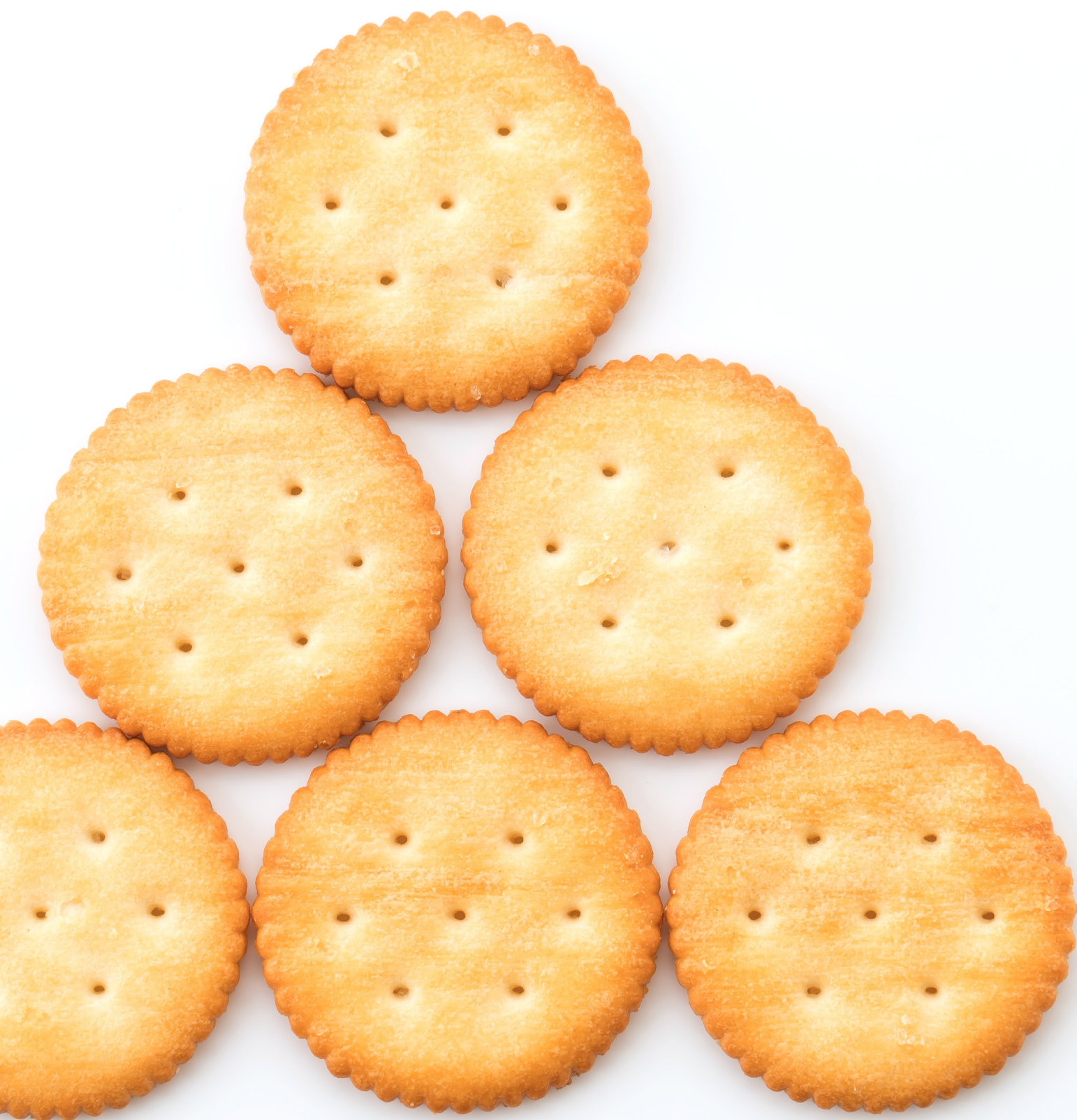
European Snacks Association sustainability report

2024-2025



European  
Snacks  
Association









## Christopher Gosau

ESA president

emissions, safeguarding biodiversity and soils, and fostering healthier diets for future generations. Yet, this transformation must take place within an environment where food producers face intense competition, evolving consumer expectations, and growing regulatory demands. Achieving this balance requires not only innovation and investment, but also a shared commitment across the value chain and sustained dialogue with policymakers and stakeholders. This report demonstrates our sector's determination to embrace that responsibility, ensuring that environmental stewardship and economic resilience advance hand in hand.

Growing sustainably is not only the right thing to do, it also makes strong business sense. Long-term competitiveness in the savoury snacks sector depends on anticipating and addressing sustainability challenges, both within companies' own operations and across their supply chains.

Our members have been proactive in this respect for many years, and their actions are increasingly aligned with the European Commission's vision for a healthier, fairer, and more sustainable food system. Whether through the EU Vision for Agriculture and Food, the Water Resilience Strategy, the Circular Economy Action Plan, or other flagship initiatives promoted by the European Commission, we see clear opportunities for our industry to contribute meaningfully to Europe's sustainability goals.

You will find in this second edition of ESA's sustainability report, an overview of some of the most inspiring commitments, initiatives and achievements of members on their path to making snacking more sustainable - from the field to the packet!

In June 2025, I had the honour to be elected President of the [European Snacks Association](#) (ESA) for a two years-term. It is a privilege to take the helm of an organisation that stands at the heart of Europe's savoury snacks industry. Our snacks are part of daily life for millions of Europeans, bringing people together at family tables, on-the-go moments, or shared occasions with friends. As president, I am proud to champion a sector that not only delivers enjoyment but also continues to innovate and take responsibility for its role in society. The sector not only delights millions of consumers every day but also drives innovation, supports jobs, and shapes the future of sustainable food production across the continent.

ESA brings together the European savoury snacks ecosystem and represents the many voices that drive it forward, from manufacturers to suppliers of ingredients and machinery, as well as national trade organisations. United by a common purpose, we work to ensure that our sector remains a responsible stakeholder that contributes to a healthier Europe.

However, reconciling the need for sustainable transformation with the imperative of competitiveness stands as one of the defining challenges for the food industry. The transition towards more sustainable food systems is essential to addressing climate change, reducing greenhouse gas

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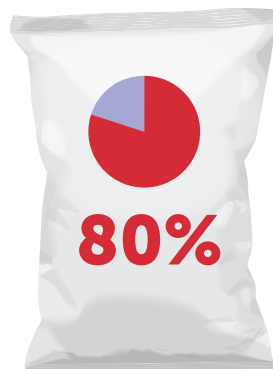
## WHO WE ARE

The European Snacks Association (ESA) is the voice of the European savoury snack and snack nut industry.

On behalf of snack producers and their suppliers - including ingredients, equipment, packaging - as well as national trade organisations, we promote the development and understanding of savoury snack products at European level.



Approx.  
**100**  
Production sites  
across the EU



We cover  
more than  
**80%** of the  
branded  
European  
savoury snacks  
market

  
Member  
companies  
**+200**

  
Direct  
employment  
**+40,000**  
People



Sector retail value 2024

**€50bn**  
Approx.

### BOARD OF DIRECTORS

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IMPORTACO

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Food. Drinks. Smiles.

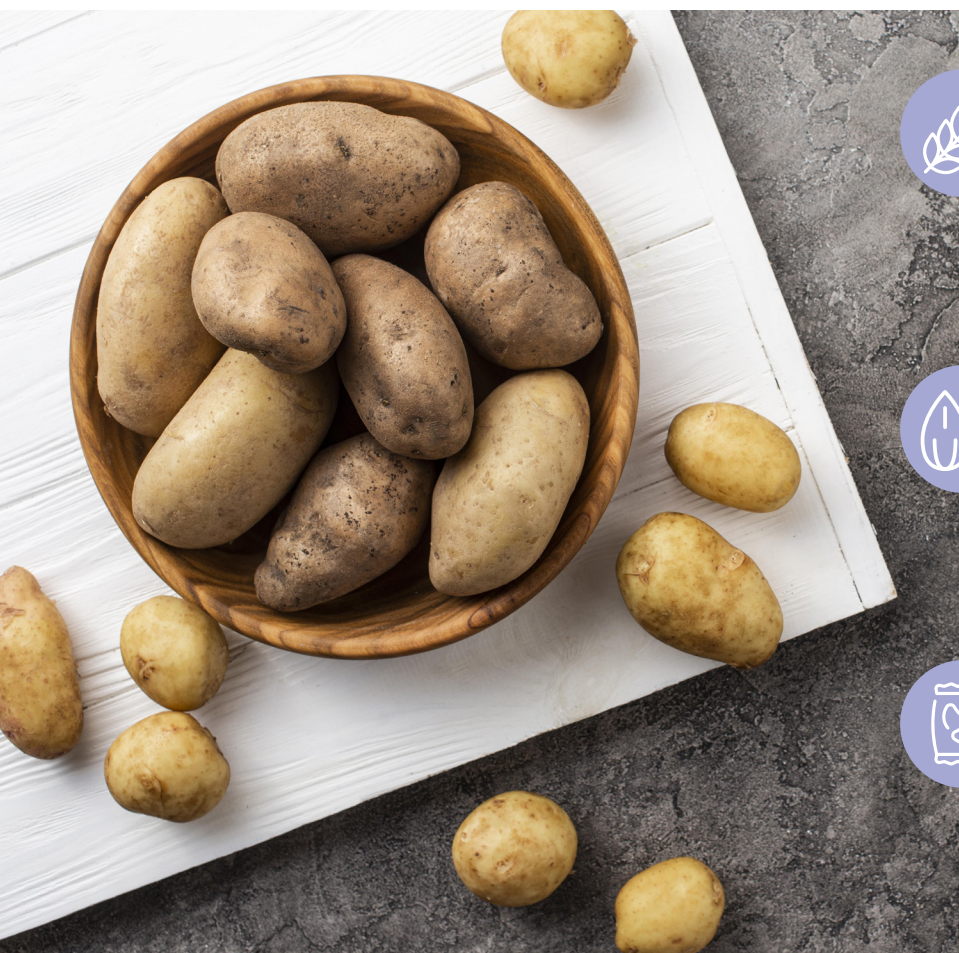
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FOOD TECHNOLOGIES

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## SAVOURY SNACKS AS PART OF A HEALTHY AND BALANCED DIET



### STAPLE RAW MATERIALS

Savoury snacks are made from staple raw materials such as vegetables (potato, carrot), fruit (tree nuts), grains (wheat, maize, rye, rice or quinoa), pulses (chickpeas, lentils), and vegetable oils.



### BALANCE & MODERATION

Our products are enjoyed by millions of consumers every day, at different occasions across Europe. They can be a quick energy boost when on the go, an aperitif or a meal accompaniment. Consumed in moderation they can be part of a balanced diet.



### WIDE VARIETY

The sector offers a wide variety of products including potato crisps, puffed snacks, corn chips / tortillas, baked snacks, crackers, pretzels, savoury biscuits, popcorn, meat snacks, peanuts and other snack nuts.

## A VIBRANT SECTOR POWERED BY INNOVATION



Vegetable, pulse and bread chips was the most dynamic product area over the past years, with nuts, seeds and trail mixes adding most of the new market growth value.

Potato chips was the second biggest contributor to overall new value sales. Manufacturers continue to innovate to introduce healthier versions of potato chips, such as oven-baked or low in salt/fat, to meet consumers' changing demands.



Looking forward, plant-based, high-protein, and high-fibre innovations will play an ongoing role in driving growth across the sector.



# 1

### FOOD PRODUCTION / SOURCING

#### BIODIVERSITY AND SUSTAINABLE SOURCING

Always striving to do better on environmental sustainability, ESA members support and promote the use of sustainable practices by their suppliers of agricultural products that preserve natural resources



Boosting **regenerative agriculture practices** to improve soil health and soil fertility as well as protecting water resources and biodiversity



Developing **sustainable sourcing** to raise food production standards



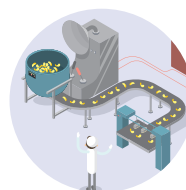
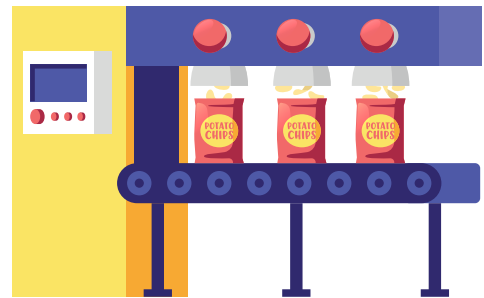
Promoting **ethical sourcing** for more transparent value chains and support to local farmers and processors

# 2

### PROCESSING

#### PRODUCTION AND DISTRIBUTION

ESA members optimise the use of resources in their supply chain wherever possible and support the integration of circular economy principles



#### Optimising production plants to:

- Reduce green-house gas emissions and promote the use of **renewable energy**
- **Save water** at every step of the production lines
- **Reduce food waste and valorise by-products** (e.g. potato peels) to produce energy and animal feed



Striving to find innovative solutions for more **sustainable packaging** that maximise the use of resources and minimise waste

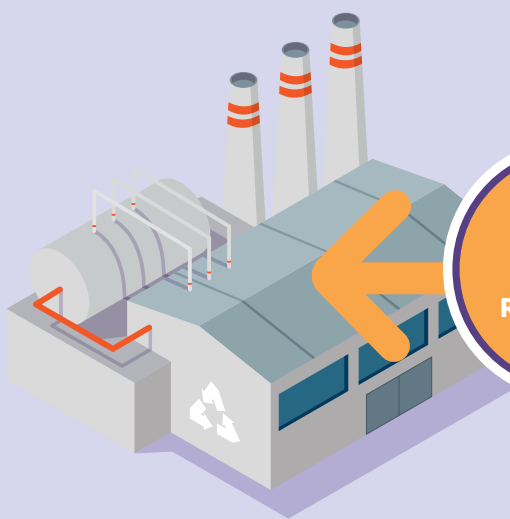


Minimising the impact of transports and logistics operations to **reduce green-house gas emissions**

## DISTRIBUTION LOGISTICS



## WASTE DISPOSAL AND RECYCLING

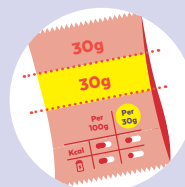


## HEALTHY AND SUSTAINABLE DIETS

ESA members are committed to respond to consumer demand for a healthier and more sustainable diet



Innovating to develop the market for **healthier options**, reducing average salt and saturated fat content while promoting fibre- and protein-rich ingredients such as pulses



Helping consumers to make informed choices through **accurate labelling and guidance on portion size**



**Advertising responsibly** to reduce the exposure of children to savoury snacks advertising and support parental efforts to promote healthier snacking choices and balanced lifestyles









# Biodiversity and sustainable sourcing

ESA members are committed to continuously advancing environmental sustainability by protecting, promoting, and restoring natural resources.



A central focus is ensuring a sustainable and resilient supply of agricultural raw materials for savoury snack production, while **supporting farmers in their transition to more regenerative farming practices**. Our industry recognizes that progress in sustainable agriculture can only be achieved **in close partnership with farmers**. ESA members actively collaborate with growers to help them adapt to climate change, strengthen their resilience, **and improve both productivity and biodiversity**.

**Long-term relationships with farming partners**—such as potato or peanuts growers—are central to this effort, providing farmers with stable and fair incomes while ensuring manufacturers a reliable supply of high-quality crops. This **shared value approach** fosters both the economic health of rural communities in Europe and across the globe, as well as the resilience of food systems.

To **accelerate the shift towards more regenerative and climate-smart agriculture**, ESA members are adopting and promoting practices such as:



**Precision farming to optimize yields and restore biodiversity**



**Water management to improve irrigation and preserve natural resources**



**Waste management to reduce crop and food losses at field level**



**Soil management to strengthen soil health and optimize fertilizer use**



**Carbon sequestration to mitigate climate change impacts**

For snack nuts, reliable access to **safe, traceable, and sustainable supply chains** is equally essential. ESA members are fully committed to promoting **responsible global sourcing** and apply **rigorous due diligence procedures** to ensure that raw materials are produced in line with the **highest environmental, social, and ethical standards**.

They take their obligations seriously, abiding by international conventions as well as European law and standards, and many have developed proprietary sourcing frameworks that go **beyond compliance** to actively drive positive impact across the value chain.

This includes **working closely with suppliers and farming communities** to foster **transparency, respect for human rights, and fair labor practices** in line with international standards and initiatives such as the Ethical Trading Initiative (ETI) or equivalent program related to employment practices.

ESA members recognize that building **resilient and sustainable nut supply chains** requires not only compliance, but also **long-term investment in people and ecosystems**. Beyond compliance, many companies are directly engaged in field projects across Africa, Asia, and Latin America that support local farmers and processors. These initiatives focus on improving livelihoods, strengthening farming practices, and increasing access to international markets.

**ESA members help create more transparent and resilient value chains while supporting farmers in adopting more sustainable, regenerative practices that protect biodiversity and contribute to local economic development.**



## 1 LORENZ REGENERATIVE AGRICULTURE ROLLOUT

Agricultural produce is at the heart of the snacks Lorenz produces and the company is convinced that regenerative agriculture can make a decisive contribution.

Together with farmers and partners in Europe and around the world, **Lorenz is working on projects relating to its most important raw materials like potatoes, wheat, oil, peanuts. It actively supports farmers in the transition to regenerative practices.** The aim is to promote cultivation that not only conserves resources, but also strengthens the long-term health of soils, biodiversity and the resilience of our ecosystems. At the same time, Lorenz is committed to support the economic development of farms and maintain fair partnerships.

In 2024, Lorenz has achieved significant progress:  
Global carbon emissions reduction: **More than 4,850 tons of carbon thanks to the implementation of regenerative agriculture practices** (potatoes accounting for 4,284 tons and wheat for 566 tons)

- Oil: Following intensive discussions with suppliers of sunflower and rapeseed oil, the first projects to drive forward carbon emissions reduction will happen in 2025
- Wheat: Pilot project launched in Poland with three mills to find out how regenerative agriculture can help reduce carbon emissions
- Peanuts: Completed the first phase of an industry-wide project in peanut cultivation in Argentina with the aim to reduce carbon emissions and increase resilience





2

## INTERSNACK'S SUSTAINABLE AGRICULTURE PROGRAMME

With agriculture accounting for around half the company's scope 3 emissions, sustainable agriculture represents a key lever for greenhouse gas emissions reductions, while providing an opportunity for long lasting, positive impact for supply chains through improved soil health, safeguarding biodiversity and the protection of water systems.

In 2023, the company launched its farmer centered sustainable agriculture programme. **Through the "local for local" approach, Intersnack works with on the ground agriculture partners who directly collaborate with farmers.** These trusted local organisations understand the specific country, region and field challenges potato growers face, and as such are vital to the success of the programme. **In 2024, leveraging the expertise of the local implementation partners, the company co-delivered a full calendar of farmers events, including regionals fields days and winter workshops on soil health, innovative methods and farming machinery.** The programme extended beyond the initial two countries, UK and France, and now includes Sweden and Germany.

As part of this efforts, Intersnack is an active member of the [Global SAI platform](#) and the [Cool Farm Alliance](#), two leading networks that provide shared framework, tools and data-driven methodologies to support sustainable and regenerative farming across supply chains.

3

## PEPSICO & MARS/ ADM REGENERATIVE AGRICULTURE PROJECT IN POLAND

As part of its Positive Agriculture agenda, PepsiCo is advancing regenerative farming in Poland through a strategic partnership with Mars and ADM. **The initiative supports 24 farmers across 5,454 hectares, embedding regenerative practices across crop rotations—including cereals, legumes, and cover crops—to improve soil health, water retention, and biodiversity.**

PepsiCo is leading sustainable rapeseed cultivation across 2,160 hectares for Lay's and Doritos, while ADM provides technical and financial support to facilitate the transition. This programme contributes to **PepsiCo's global ambition to implement regenerative practices over 10 million acres and reduce 3 million tonnes of greenhouse gas emissions by 2030.**





## 4 GRIFFITH FOODS' SUSTAINABLE SOURCING INITIATIVE

To help building food systems that are sustainable and resilient for both people and the planet, **Griffith Foods established its TEROVA business in 2019 to work directly with spice and herb farmers to create an integrated supply chain.**

TEROVA uses a farmer-first approach to source ingredients, with a focus on supplying fully traceable and sustainably certified spices, herbs, botanicals, and innovative ingredients. The TEROVA teams work directly with farmers in the communities where we source our raw materials to enhance sustainability through education and training. It helps train these farmers on how to improve their sustainability practices such as reducing fertilizer use, promoting composting and soil enrichment, and implementing procedures to improve ingredient integrity and reduce waste. **As part of its 2030 Aspirations, Griffith Foods has a goal to create a positive impact for 25,000 small-scale farmers, and so far, it has reached 3,089.**

TEROVA community projects have helped thousands of people across India, Albania, and Vietnam. In Albania, Griffith Foods supports annual health clinics that provide medical care for the farmers where we source our herbs. The sage and oregano grown in Albania is Rainforest Alliance Certified, meaning it meets standards for worker rights, economic viability, and ecological well-being.





## 5 IMPORTACO'S TERRA PROGRAMME

In 2024, Importaco Terra strengthened its sustainable farming model across 550 hectares of almond orchards in Spain and Portugal, applying regenerative agriculture principles. These practices are aimed at preserving and enhancing soil fertility, preventing erosion, and fostering microbial activity essential to maintaining balance.

The farms achieved Silver level in the Farm Sustainability Assessment (FSA), becoming the first Spanish almonds to receive this recognition. In addition, cover crops were implemented across 100% of the orchard rows, helping to improve soil structure and reduce the use of herbicides.

The programme also includes a 30.3% reduction in the use of fertilizers and pesticides, prioritizing integrated pest management and organic alternatives. These measures, together with the protection of pollinators and the creation of habitats favorable to biodiversity, consolidate a farming model that not only safeguards soil health but also ensures the resilience of agricultural ecosystems.



## 6 PEPSICO & YARA: DECARBONISING AGRICULTURE THROUGH LOW-CARBON FERTILISERS

PepsiCo has a long-term partnership with Yara in Europe to provide farmers with crop nutrition programs that support the decarbonization of the food value chain. **Fertilizers represent the biggest opportunity to cut emissions, as their production and in-field use account for half of PepsiCo's average potato carbon footprint in Europe.**

More broadly, fertilizers play a major role in global emissions, contributing about 5% of global GHG emissions, with most emissions stemming from production and on-farm use. Such practices will help farmers to reduce their Scope 3 emissions, while also supporting innovators scaling these solutions across Europe.

**This collaboration supports around 1,000 farmers across Europe, representing 25% of PepsiCo's regional sourcing base. By 2030, it is expected to reduce fertilizer production emissions by up to 80% and in-field emissions by up to 20% across approximately 128,000 hectares.**



2







# Production and distribution

ESA members are committed to using resources responsibly, cutting greenhouse gas (GHG) emissions, and embedding circular economy principles throughout the savoury snacks value chain.

For many years, snack manufacturers have been investing in making their **production plants cleaner and more efficient**.

- Today, a growing number of factories run fully on **renewable energy**, while others combine solutions such as solar panels, wind energy, or biogas generated from organic by-products.
- **Many companies are also introducing smart energy management systems**, upgrading machinery to reduce energy use, and installing technologies to recover and reuse heat. These steps help reduce overall consumption and bring factories closer to carbon-neutral operations.
- **Transport and logistics** are also part of the picture, with **companies working to cut emissions** by optimizing routes, switching to low-emission vehicles, and exploring alternative fuels.

**Circular economy practices are equally important on the production line, with a strong focus on saving water and reducing food and oil waste.**

- New technologies now allow water to be distributed more efficiently and used **water is frequently collected and reused further down the chain**, helping to cut overall consumption. **Waste is no longer simply discarded but given a second life.**
- For instance, potato starch recovered during processing is reused as a raw material for other snacks, while **potato peels are repurposed** as animal feed or sent to biogas facilities. **These practices reduce waste, save resources, and add value to by-products.**

**Packaging also plays a key role in protecting products and avoiding food waste, while the industry is working hard to make it more sustainable.**

In line with the EU Packaging and Packaging Waste Regulation, ESA members are committed to **improving the circularity and environmental performance of packaging without compromising food safety or quality.**

Their initiatives include:

- **Cutting down on the use of plastics** wherever possible
- **Redesigning packaging** so it is easier to recycle
- Supporting research and innovation in **new materials and advanced recycling methods**, such as chemical recycling
- Working with public authorities and the wider value chain to **strengthen collection, sorting, and recycling of flexible packaging**

**Through these combined efforts — from greener factories and smarter use of resources to innovative packaging solutions — the European savoury snacks industry is taking concrete steps towards a more sustainable future.**



# Cutting green-house gas emissions

## 1 INTERSNACK'S COMMITMENT TO GREEN ELECTRICITY

Intersnack is committed to lowering its environmental footprint, driven by a zero-loss mindset and a dedication to efficiency. To support global climate action, the company is looking to reduce its emissions footprint both from direct operations and supply chain.

In 2023, Intersnack's Science Based Targets initiative (SBTi) targets were approved, taking the commitment to climate action to the next level, for instance **by setting a target of 50% absolute reduction of Scope 1 and Scope 2 and 30% for scope 3 emissions versus 2021.**

Moreover, as part of the company's climate commitment, **Intersnack has committed to a target to use 100% renewable electricity by 2032.**

A crucial step towards this goal is the solar generation park in Spain, which became operational in 2025. **Through a long-term supply agreement, Intersnack facilitated the construction of an impressive new solar farm.** For Intersnack, this is generating around 90,000 MWh of electricity per year, which accounts for nearly 50% of the company's total European electric energy needs. **This will result in a total reduction of up to 30,000 tonnes of carbon emissions per year.**

This step marks a strategic milestone in Intersnack's decarbonization efforts and its promotion of renewable energy across its European operations. It is a key element of the group strategy to reduce Scope 1 and Scope 2 emissions over the next decade.



## 2 PRINGLES NEW LOGISTICS HUB IN MECHELEN

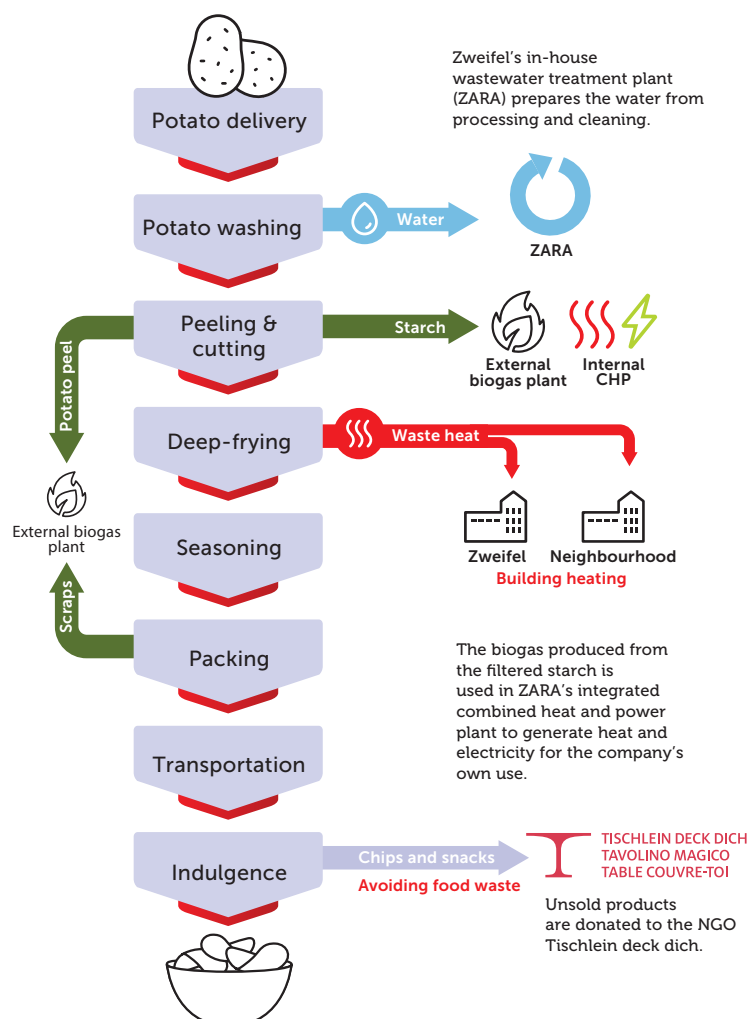
Pringles has inaugurated its largest European logistics site in Mechelen, Belgium, marking a major step in logistics efficiency and sustainability. **The 65,000m<sup>2</sup> warehouse, adjacent to the Pringles factory, will handle around 250 tonnes of food daily serving the Benelux, northern France, and other key markets.**

The new site is a milestone in the continuous efforts of the company to guarantee a sustainable approach across its supply chain. The warehouse enables more efficient and sustainable logistics through three main improvements:

- The centralisation of stock and copacking activities from **five sites into one hub**;
- By using trucks that are fully loaded and operating from a single hub, road congestion is **reduced by 30%** between the production site and the warehouse;
- The collaboration with customers to ship goods double-stacked, with the objective of **better filling trucks to help reduce the company's carbon emissions footprint.**

Looking ahead, Pringles is actively exploring electric trucking solutions, and plans to install solar panels on the warehouse

aim to further reduce reliance on conventional energy sources, fostering carbon neutrality. **At global level, Pringles has committed to setting near- and long-term company-wide emission reductions** in line with science-based net-zero standards with the Science Based Targets initiative (STBi). To achieve this, **its production sites in Europe are already powered with 100% renewable electricity.**



## 3 ZWEIFEL'S EFFORTS TO LEVERAGE PROCESS CYCLES

Zweifel Chips & Snacks AG looks carefully at where it can generate its own energy and integrate previously underutilised energy sources. For over 30 years, the company's own wastewater treatment plant has been at the heart of its water cycle. This filters the dissolved starch from the potato washing process and produces biogas, which is converted into heat and electricity for the company's own use by its combined heat and power plant (CHP). Potato peel and pieces, as well as chips and snacks removed during production as unsuitable for sale, are currently processed into biogas in an external plant.

**At our Spreitenbach site, we source 100% of our electricity from hydropower.** Every year, the site generates around 0.5 GWh of electricity via the solar panels. Thanks to further expansion, this is set to double by 2033. **From 2025, the waste heat from crisps production will also be used for the entire building heating system** at the Spreitenbach site, utilising storage facilities.

The large-scale construction project in Spreitenbach is an opportunity to replace old production facilities with fossil-free production technologies by around 2033. The company has a clear plan aimed at ensuring full electromobility by 2040.



## 4

### IMPORTACO'S DECARBONISATION STRATEGY

In 2024, Importaco consolidated its decarbonization strategy in alignment with the Science Based Targets initiative (SBTi), with officially validated goals: **reducing Scope 1 and 2 emissions by 42% and agricultural FLAG emissions by 30% by 2030**. In addition, we have committed to **decreasing absolute Scope 3 emissions across our entire value chain by 25%**, including transport, distribution, and the full life cycle of our products.

All Importaco's production sites in Spain are certified under the ISO 50001 energy management standard. **Currently, 9.2% of the electricity used comes from self-generated photovoltaic power, complemented by biomass sourced from almond shells**. These initiatives, together with the integration of renewable energy and enhanced energy efficiency, reinforce the company's commitment to achieving net zero emissions before 2050.



## 5

### PEPSICO'S ACTIONS ON GREENER TRANSPORT AND CLEAN ENERGY

PepsiCo is making potato transport for Lay's crisps more sustainable through a partnership with logistics provider AB Texel. Each year, AB Texel trucks cover approximately 3 million kilometres transporting potatoes from local farmers to PepsiCo's factories in Broek op Langedijk, Netherlands, and Veurne, Belgium. **By switching to Bio-LNG, a fuel made from organic waste, PepsiCo is reducing 2,545 tonnes of carbon emissions annually.**

In addition to cleaner transport, PepsiCo is working with energy provider Eneco to electrify its Broek op Langedijk snacks plant. **A thermal storage unit powered by wind and solar energy is being installed to sustainably heat the oil used for frying crisps.** These efforts are part of PepsiCo's broader pep+ (PepsiCo Positive) strategy to decarbonise operations and reduce reliance on fossil fuels.





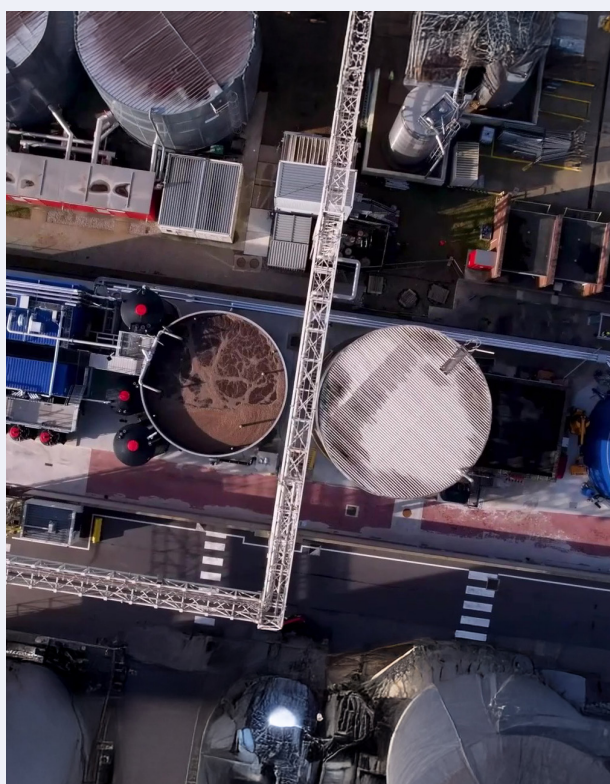
## Valorising food waste and saving water

### 1 PAULIG'S UPCYCLED SNACK PELLETS

Paulig's new range of snack pellets is composed of **100% upcycled vegetable ingredients**. Upcycled ingredients refers to a flour that is made from food byproducts or waste that would otherwise be discarded. These byproducts are re-purposed and transformed into flour, which can then be used in various food products. Upcycling is an environmentally friendly practice that helps to reduce food waste by finding new uses for food that would otherwise be thrown away.

By utilizing upcycled ingredients, we transform food byproducts into high-quality snacks, reducing waste and promoting sustainability. **With a formulation that includes more than 15% plant-based upcycled ingredients**, Paulig's new range features natural sources like beetroot, pumpkin, spinach, and beer bagasse, offering fiber, antioxidants, and essential micronutrients.

This approach responds to the growing trend of upcycling in the food industry, where surplus production is transformed into functional ingredients. This sustainable approach not only enhances nutritional value but also addresses food waste, a critical global issue.



### 2 PRINGLES WATER RECOVERY PROJECT

The Pringles factory in Mechelen, Belgium, has implemented a **pioneering water recovery project that reduces its water consumption by 50%**, aligning with the company's global goal to cut its water footprint by 30% by 2030. This initiative is especially significant in Belgium, where water scarcity is a growing concern.

The project features a state-of-the-art water purification system developed in collaboration with local water treatment experts Pantarein. The system treats wastewater to drinking water standards using a three-step process—biological treatment, ultrafiltration, and reverse osmosis—allowing the recovered water to be reused in factory operations such as steam generation and cooling.

**The installation is expected to save 200 million litres of water annually**, equivalent to the yearly consumption of nearly 10,000 people. Additionally, residual streams from the purification process are used by an external partner to produce biogas, contributing to circular energy use.

This modular system, built in just six months, is the first of its kind for Pringles globally and can be expanded in the future. The company also plans to explore similar reuse strategies for rainwater to further reduce its environmental footprint.



### 3 PAULIG'S ENVIRONMENTAL IMPACT AND WATER MANAGEMENT

In 2024, Paulig conducted a thorough assessment of its environmental impact, focusing on water usage and biodiversity dependencies. The findings revealed significant reliance on biodiversity in raw material production across 70 countries, with water risks identified in over 15% of these regions. To address these challenges, **Paulig is collaborating with suppliers to enhance biodiversity and improve water management practices.** The goal is to establish specific targets and a comprehensive roadmap to minimize the impact on nature.

In water-stressed areas like our snack factories in Spain, the company is proactively addressing water consumption concerns. **By implementing efficient**

**equipment and process improvements, Paulig achieved a 22% reduction in water usage at the Berga site between 2023 and 2024.** These efforts align with regional water conservation measures and support the commitment to sustainable practices.

In 2024, Paulig also conducted an in-depth assessment of long-term water availability and stress, considering the socio-economic situation and reviewing governmental mitigation actions at selected sites. As part of the study, two extreme climate scenarios from the Intergovernmental Panel on Climate Change (IPCC) were used to evaluate future water availability at the selected sites. This research focused on changes in water availability due to climate change and the local context regarding water demand and stress. It identified a range of risk mitigation measures within the company's control, such as the use of wells, as well as ongoing initiatives from local authorities.







## 4 PEPSICO'S WATER STEWARDSHIP IN WEST FLANDERS

In West Flanders, Belgium, PepsiCo has partnered with Natuurpunt to restore water balance and biodiversity in a number of nature reserves—De Blankaart near its Veurne crisp plant and Uitkerkse Polder and Damme near Zeebrugge. The initiative includes redirecting flood water into grasslands via a system of canals and ditches, helping retain moisture in the soil and replenish local ecosystems. **As of 2025, over 215.000 m<sup>3</sup> of water had been replenished.**

**In 2024, PepsiCo started a collaboration with Westkustpolder to deliver another 259.000 m<sup>3</sup> replenished water through the implementation of automatic control units to weirs.**

This will improve management of water levels during dry periods in the Veurne watershed. The project is scheduled to be completed by the end of 2025.

**At the Veurne site, PepsiCo aims to reducing tap water usage from 3.5 litres to 1.7 litres per kilogram of crisps by 2030.** The factory also uses biogas-generated electricity and is investing in smart water monitoring and reuse technologies.

PepsiCo is working closely with local potato growers to pilot drought-resistant varieties and precision irrigation systems, supported by digital tools that monitor crop growth and water needs in real time.

## 5 IMPORTACO'S BATTLE AGAINST FOOD WASTE

75% of Importaco's sites in Spain are already certified as Zero Waste. **In 2024, we recovered more than 5,000 tonnes of waste, transforming it into energy and recycled materials.** At Importaco Nuts, we are driving a comprehensive plan to combat food waste, reducing losses in industrial processes and exploring new opportunities for the commercialization of by-products. We have also increased plastic separation in our facilities by 64%, reflecting our strong commitment to the circular economy.





## Boosting packaging circularity



### 1 LORENZ INNOVATIVE PACKAGING SOLUTION IN THE NUT SECTOR

Nuts have high demands on packaging properties. Outstanding barrier functions, good sealing properties and visual appeal - all this was previously only possible with packaging made of several layers of material, some of which are difficult to recycle. **To improve recyclability, Lorenz piloted a mono-material for nuts.**

The AmPrima™ packaging solution from Amcor, which was used for Lorenz Lentil peanuts on the Austrian market, is not only recyclable. It also complies with the high environmental guidelines that [CEFLEX](#) has formulated for the circular economy. The packaging is certified as recyclable in countries where PE or PP recycling streams exist. **It shows a 51% reduction in carbon footprint, a 41% reduction in non-renewable energy consumption and a 51% reduction in water consumption** compared to traditional non-recyclable packaging options. This means that both the carbon and water footprints are half the size of our previous packaging for dough-coated nuts. The successful implementation paves the way for further projects in the Lorenz nut sector.



### 2 ZWEIFEL'S PACKAGING RECYCLING

As a founding member of the industry organisation RecyPac, Zweifel is contributing towards the systematic development of a circular economy for plastic packaging and beverage cartons in Switzerland. **In line with this aim, the company's packaging will be optimised by 2030 and is expected to then be fully recyclable.** Around 81% of Zweifel's product packaging is currently technically recyclable. Film thickness has already been reduced as much as possible, averaging 50 micrometres.



### 3 SAN CARLO PAPER PACKAGING INNOVATION

The Veggy Good range, balanced salty snacks made from 100% natural ingredients, now features **packaging made from FSC (Forest Stewardship Council) certified paper, which is fully recyclable as paper.** Furthermore, beginning in 2024, **all paper packaging, both primary and secondary (including cartons), is produced exclusively from FSC-certified paper.**

However, San Carlo's commitment goes beyond packaging itself. The company also prioritises the sustainability of packaging logistics. **Since 2022, San Carlo has been using a pallet pooling service for its shipments, reducing pallet purchases and minimizing the inefficient transport of the returnable pallets.**

This initiative has delivered significant environmental benefits in 2024 alone, including savings of over 180,675 dm<sup>3</sup> of wood resources (equivalent to more than 175 trees), a reduction of 571,009 kg in CO<sub>2</sub> emissions (comparable to 13 truck trips around the world), and 16,871 kg less waste (equal to 4 truckloads).



### 4 PRINGLES RECYCLABLE PAPER-BASED CANS

In a major step toward sustainable packaging, **Pringles has introduced a new recyclable paper-based can, by replacing the traditional metal-bottomed version with a paper fibre-based bottom.**

The iconic Pringles can, first launched in 1970, was revolutionary for its ability to keep chips fresh for up to 15 months. The resealable plastic lid—made from largely recyclable polypropylene—continues to help preserve freshness after opening, reducing food waste. The new design maintains the iconic Pringles flavour, freshness and resealability, while giving the packaging a more natural look. The paper used is largely recycled, as was the case with the previous packaging. The full project represents a €100 million investment in sustainable packaging technologies.

**The transition is part of Pringles broader ESG goal to work towards 100% reusable, recyclable or compostable packaging by the end of 2030.**

The new Pringles paper-based recyclable tubes are already available in Belgium, in the UK and in the Netherlands with plans to scale up their launch across Europe.



# Promoting safe and positive work environment

## 1 PRINGLES DEPLOYS VIRTUAL REALITY TO OPTIMISE TRAINING AND PRODUCTION

Pringles Mechelen has introduced a new virtual reality (VR) system to enhance employee training and optimise production processes. Developed in collaboration with students from Howest University and local tech firm Spectr BIM, the system enables interactive simulations of key production stages—including, for the first time, the internal cooking process of the closed fryer—without interrupting operations.

**The VR technology allows teams to visualise and troubleshoot processes in real time, leading to faster interventions, reduced food waste, and more efficient energy use.** It also supports quicker, more engaging training for new employees, helping to build knowledge, improve decision-making, and foster a culture of continuous improvement.

With production running 24/7, averaging two million tubes of Pringles per day, these advancements contribute to making the factory a state-of-the-art facility, constantly evolving and particularly attractive to new employees and young talents seeking a modern environment where they can bring their creativity to achieve innovative improvements.

**This pioneering use of VR technology also supports Pringles' commitment to sustainability by optimizing the process and the use of resources.**





## 2 PAULIG'S DIVERSITY, EQUITY, AND INCLUSION INITIATIVES

At Paulig, diversity, equity, and inclusion (DEI) are core values that guide actions and decisions. In 2024, Paulig enhanced its DEI commitment by introducing a Group-wide policy and partnering with Workplace Pride. The initiatives included hosting DEI Talks webinars and developing a DEI discussions toolbox to promote inclusivity and open dialogue within the organization.

The company aspires to be a fair and inclusive employer and partner throughout the entire value chain. By 2030, the objective is to source all raw materials from high-risk areas from sustainable, externally verified sources. At the same time, **Paulig is committed to developing a value driven company culture to ensure that every Paulig employee sees the organization as fair and inclusive.** The aim is to foster an engaging work environment, underpinned by a culture that strongly promotes safety and wellbeing at work.

In 2024, the group established a dedicated team for People Development and Experience and appointed a DEI Lead to champion diversity, equity, and inclusion across all levels of the organization. Experienced and motivated professionals in People & Culture function ensure that "Pauligians" receive the support they need to grow and thrive in their roles.

**This includes continuous development initiatives, improved access to resources, and programmes aimed at creating winning and respectful teams.**

Together, these efforts are shaping future-ready employees at Paulig. In 2024, Paulig introduced its first capability-building strategy, which identifies and defines the business capabilities and associated skills necessary to enable growth. **This strategy enables the company to nurture its people by investing in their skills, enhancing job satisfaction, and increasing retention.** The goal is to foster not just careers but also a sense of belonging and accomplishment among the employees.





3







# Healthy and sustainable diets

ESA members are committed to responding to citizens' expectations and consumer needs, with the ambition of supporting healthier and more sustainable eating patterns across Europe.

The European savoury snacks sector listens closely to the millions of people who enjoy its products every day. Today's consumers expect not only great taste and moments of indulgence, but also **better value for money**, continuous **nutritional improvements**, and, more than ever, the **highest standards of product safety and ingredient quality**. To deliver on these expectations, ESA members consistently invest in **product development, ingredient innovation and modern manufacturing methods**. While savoury snacks represent only a small fraction of total salt, saturated fat and fat intake in the European diet, our members are nevertheless dedicated to **reducing... salt, fat and saturated fat, without compromising on taste or variety**.

**For decades, ESA members have been at the forefront of reformulation and innovation to make snacks healthier.**

- Manufacturers have reduced average levels of salt, fat and saturated fat in their products, by introducing **high-oleic oils** (such as sunflower or rapeseed oils) instead of traditional frying oils and by adopting **innovative cooking methods like air-popping or oven-baking**.
- To further enhance the nutritional profile of snacks, producers are also integrating **more fibre-and protein-rich ingredients, such as pulses**, which aligns with broader efforts to expand the availability of healthier plant-based options.
- At the same time, in line with shifting consumer expectations, many manufacturers are **phasing out artificial flavours, colours and taste enhancers**. This drive towards **cleaner labels** reflects one of the strongest product innovation trends for the coming years, echoing society's call for **more transparent and natural food choices**.

ESA members also recognise their role as **responsible advertisers** and have long supported initiatives to ensure that marketing practices reflect societal concerns, particularly when it comes to children. **ESA is the only European trade**

**association in the sector that has signed up to the [EU Pledge on responsible food and beverage advertising to children](#)**, a commitment designed to complement parental guidance and encourage healthier choices and balanced lifestyles for younger generations.

Finally, ESA members champion **clear and reliable food labelling** to empower consumers with the information they need. This includes **transparency on ingredients, nutritional value, portion sizes and storage**. ESA recommends a portion size of 30g for savoury snacks and snack nuts, a benchmark that mirrors real consumer eating habits while remaining consistent with dietary recommendations.

As consumers and regulators increasingly demand greater access to product information, our members also support allowing food business operators to provide such details through **digital means**. This approach offers more flexibility to ensure information is **accurate and up to date**, while also helping to **reduce packaging waste**.

**By continuously improving recipes, embracing cleaner labels, and providing transparent information to consumers, ESA members are helping shape a food environment that balances taste, health, and sustainability. Their commitment ensures that savoury snacks can remain a source of enjoyment while contributing to healthier lifestyles and more responsible food systems for future generations.**



# Innovation for healthier snacking

## 1 LORENZ

Lorenz continuously improves its recipes and snacks in order to ensure a balanced diet and therefore carefree snacking. The company has set clear targets for reducing salt content and made very good progress in 2024 by meeting the target **to reduce 15 % salt across the entire product range** one year ahead of schedule!

The next step was to add more nutritionally beneficial ingredients. To this end, the company developed the Lorenz Nutrition Profile for snacks based on the recommendations of renowned organizations such as the World Health Organization and the nutritional guidelines of the Planetary Health Diet.

With the Lorenz Nutrition Profile, **the company has developed an evaluation system which can measure, evaluate and compare snacks in terms of the composition of raw materials and nutritional values**. Using this transparent system, it is possible to determine how a snack in the portfolio performs with regard to a specific ingredient, such as wholegrain cereals. This provides Lorenz with a basis for offering its consumers snacks with improved nutritional physiology in a targeted manner.







## 2 ZWEIFEL

VAYA wafers were developed with the aim of providing nutritionally valuable plant-based snack alternatives. Each variety is based on a differentiated combination of selected pulses that make a valuable contribution to daily nutrition: VAYA Bean with 57% peas and beans, and VAYA Beetroot with 49% peas and beetroot. Chickpeas, green peas, beans and beetroot not only ensure a favorable nutritional balance, but also have a low ecological footprint as raw materials. They are rich in vegetable protein and support digestion with their high fibre content. In addition, with a low fat content of 3 % fat per portion (66 kcal per single pack), they are suitable for a calorie-conscious diet.



## 3 GRIFFITH FOODS

Griffith Foods is on a mission to develop more sustainable and nutritious products for our global customers. The company is committed to optimizing the nutritional value of their own finished goods, in an effort to deliver the most optimal product. **Griffith Foods developed new Global Nutrition Criteria to help guide the evolution of the portfolio** by establishing upper limits for sodium, sugar and saturated fat along with positive nutrient targets where relevant according to the Griffith Foods' finished goods product category.





## 4 INTERSNACK

Intersnack is continuously investing in technology, reformulation and clean, natural ingredients that deliver the flavours consumers love while reducing saturated fat and salt.

Across the board, the company has shown tremendous progress year after year. **As a result, today 100% of the European portfolio is free from artificial colours and 97% are free of taste enhancers!**

The company offers a variety of tasty 'less fat' options for consumers across Europe, including Lentil Chips, Oven Chips, and Popchips. These products cater to the demand for snacks with lower fat content without compromising on taste and the flavours customers love, such as paprika, sour cream and onion, and salt. Lentil Chips, Intersnack's most popular 'better for you' product, has now been rolled out in most countries in Europe.

### Vegetarian-and vegan-suitable options

The company continues to broaden the range of products that are suitable for vegetarians and vegans. This includes reformulating some 'meat'-flavour snacks – such as McCoy's Flame-grilled Steak, Sizzling King Prawn and Thai Sweet Chicken chips. Many of the 'dairy'-flavour snacks are also suitable for vegans, for example, the Swedish range of Estrella Lentil Chips. Many of the brand websites offer the option to filter snacks by dietary requirements, making it quicker and easier for consumers to find the products they want.



5

## IMPORTACO

During 2024, Importaco consolidated its position in the market for innovative products, achieving significant sales growth, which reached €49 million—an 88% increase over the past two years.

Over this period, the company launched 210 new products, including a variety of chocolate-based options, nut mixes, and functional products focused on gut health and enhancing cognitive performance. These innovations have enabled Importaco to continue evolving and responding to market trends.



6

## SAN CARLO

In 2024, San Carlo's product development efforts focused on reformulating several product recipes to reduce fat and salt content. The company also established a new product guideline requiring the use of 100% natural flavours, with no taste enhancers.

Aligned with its commitment to offering healthier snack options, San Carlo launched the new Tortilla Light, made with corn and black beans, containing 30% less fat than the company's best-selling tortillas.

The product is gluten-free, lactose-free, and not fried. Looking ahead, San Carlo will further expand its Veggy Good range, a line of balanced salty snacks made from 100% natural ingredients, with new products scheduled for launch in 2025.





## 7 PEPSICO

Snack Reformulation & Nutri-Score Progress: **Savoury snacks** products previously rated D or E have been reformulated to meet A or B standards, hitting the 2030 conversion target six years early. PepsiCo's EU portfolio of products rated Nutri-Score A or B reached \$876 million in sales by end of 2024, far exceeding the original \$500 million goal per Nutri-Score algorithm 1.0 for 2025.





## Reducing children exposure to advertising

The [EU Pledge](#) is a voluntary initiative by leading food and beverage companies in Europe to change food and beverage advertising to children in the European Union. By changing savoury snack food advertising to children, we aim to support parental efforts to promote healthier snacking choices and balanced lifestyles among children.

As per the EU Pledge commitment, the ESA recommends that member companies do not advertise their products to children under 13 years of age on TV, print, radio, cinema and online (including social media and other online platforms and sites, including company-owned websites and video-sharing platforms such as YouTube and including influencers) at all, or only products that fulfil nutrition criteria based on accepted scientific evidence and applicable national and international dietary guidelines. In 2022, ESA Pledge members agreed to stop advertising potato-based products to children under 13, irrespective of any nutrition criteria.

Members also agree not to engage in any commercial communications related to savoury snack products in primary schools, except where specifically requested by or agreed with the school administration for educational purposes.



Each year, third-party organisations are commissioned to carry out independent monitoring and an independent reviewer assesses whether the monitoring was carried out with an appropriate methodology, resources and diligence. Results are published on an annual basis and are available at the EU Pledge [website](#).

Throughout the years, ESA members have continuously achieved excellent compliance with the commitments. In 2024, more than 98% of ESA pledge signatories' TV spots were compliant, as well as more than 90% of company-owned websites, social media profiles and influencers posts!





## Better informed consumers

**T**he ESA was able to develop a **portion recommendation of 30g** for savoury snacks and snack nuts which aims to ensure that portions are compatible with existing dietary recommendations and portions reflect consumer behaviour.

While nutrition information provided per 100g helps the consumer compare the nutrient content of different kinds of foods in general, it fails to provide information on the actual nutrient content the consumer intends to consume. Providing nutrition information on a per portion basis empowers consumers to choose a healthy, balanced diet. In this way, consumers can decide if consumption of the whole pack, or of the portion suggested on the pack of that particular food, is appropriate for them.

**Since 2010, ESA members have been encouraged to voluntarily provide the 30g portion information front-of-pack and/or back-of-pack. As a result, the vast majority of European savoury snacks manufacturers now systematically indicate the recommended portion rationale on their packs.**

Beyond the portion rationale, members have adopted different approaches to communicate

nutritional value (e.g. use of Nutri-Score or the traditional Reference Intakes scheme), ingredients or specific product attributes. Some members are also using icons on-pack to clearly show which products are gluten-free, suitable for vegan or simply helping consumers to reduce food waste, for instance.

To further extend consumer information, ESA supports the possibility for food business operators, on a voluntary basis, to provide information digitally. With QR codes, consumers can instantly access accurate and up-to-date product details. Digital labelling would enhance accessibility and consumer experience; offer real time updates; allow for multilingual communications and optimise packaging size.



### SAVOURY SNACKS LABELLING COMMITMENT & PORTION SIZE RECOMMENDATION

#### A PORTION RATIONALE OF 30G IS RECOMMENDED BY ESA

The vast majority of European savoury snacks manufacturers now systematically indicate the 30g portion on their packs.

ESA supports the use of Reference Intakes (RIs)<sup>1</sup> on pack.



Compatible with existing dietary recommendations

Reflects consumer behaviour



ESA members are encouraged to inform consumers where more than one portion is included in a pack, and about the number of portions a pack contains.

Single-portion packages should be defined as those products weighing 50g or less, and that are designed to be eaten in a single occasion.



**EMPOWER CONSUMERS** to adopt a healthy, balanced diet using portion-based information

1. Also known as Guideline Daily Amounts (GDA)





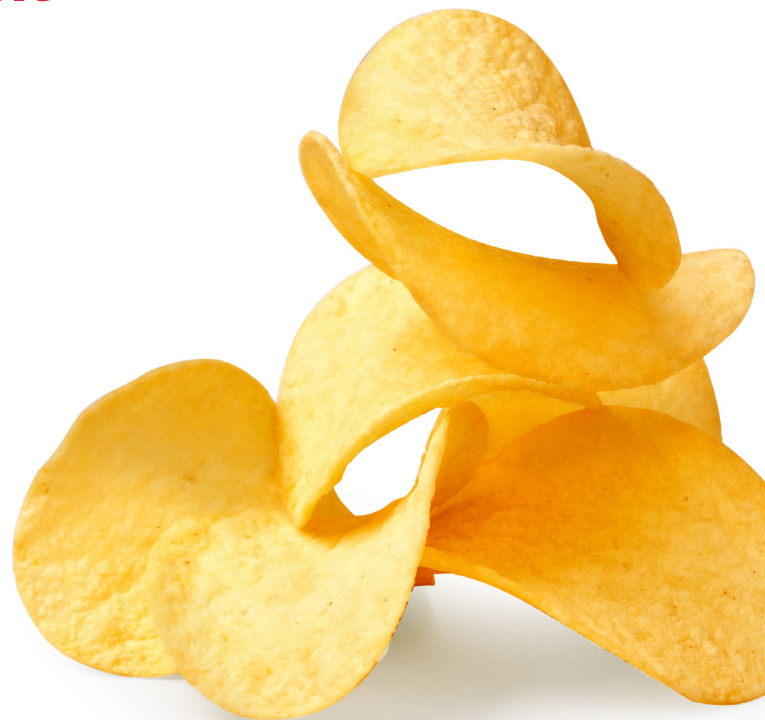
## Pringles introduces accessible packaging with NaviLens

**P**ringles is enhancing packaging accessibility by adding NaviLens technology to its cans, supporting blind and partially sighted shoppers. The new packaging allows a smartphone to easily detect the unique on-pack code and playback labelling information to the shopper with sight loss.

Important information, such as allergens, can often only be found in small print making it impossible for blind or partially sighted people to read. The NaviLens code allows smartphones to pick up the on-pack code from up to three metres distance when a shopper points their device in the direction of the product. The user does not need to know exactly where the code is located to scan it.

When the phone senses the NaviLens code, it is alerted. From here, the shopper can choose to have labelling information read aloud to them, as well as reading it on their device using accessibility tools.

**This initiative reflects Pringles' commitment to inclusive design and creating a place at the table for everyone.**





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