

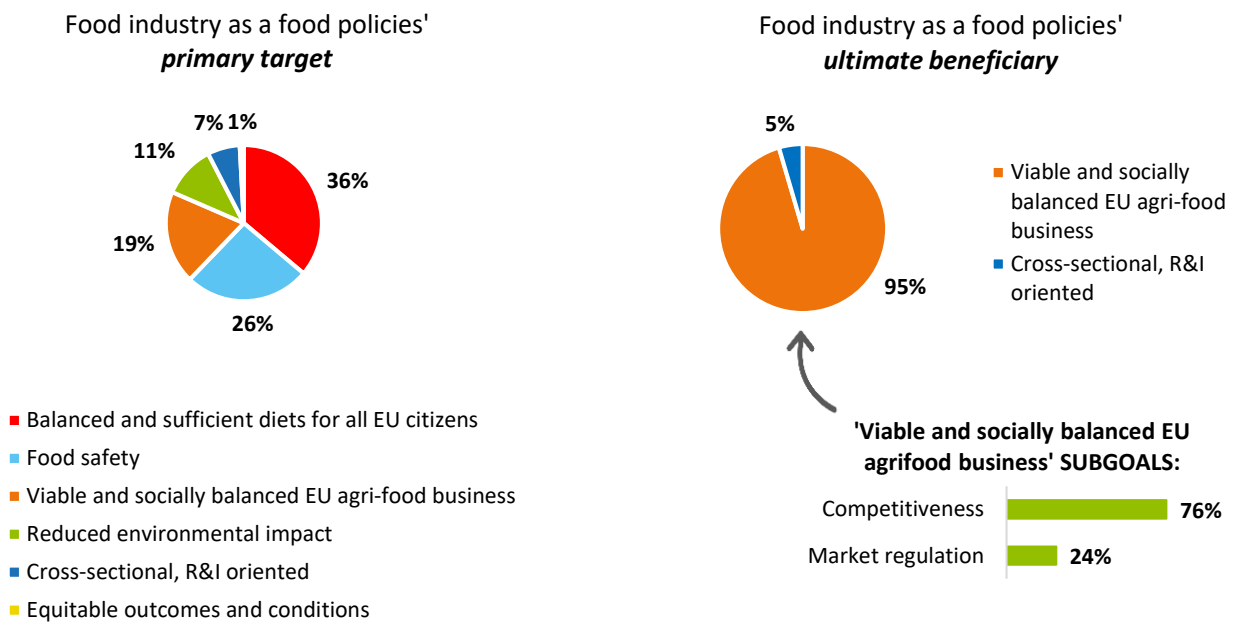
A3.6 Policy actor: Food industry

In spite of the current economic downturn, the EU food industry maintains the characteristics of a **stable, resilient and robust sector**. Indeed, it remains a **major contributor to Europe's economy** in terms of:

- *turnover* (€ 1,109 billion);
- *value added* (2.1%), despite being squeezed by the growth of input costs;
- *employment* (4.51 million people), thus representing a key job provider (FoodDrinkEurope, 2018).

From our mapping, it emerges that the food industry plays more the role of **primary target** (100 mapped policies) rather than that of **ultimate beneficiary** (22 mapped policies). Indeed, food industries are expected to be facilitators for food policies and use their expertise, scale, innovation and marketing to develop, distribute, and sell healthy and optimally processed food in a sustainable, equitable and profitable way.

Proportion of mapped policies by GOAL

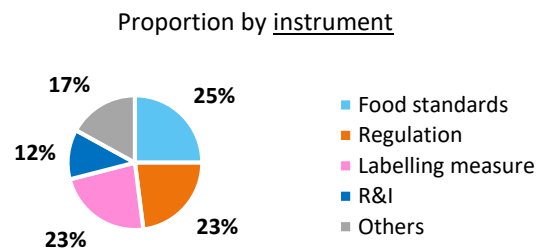
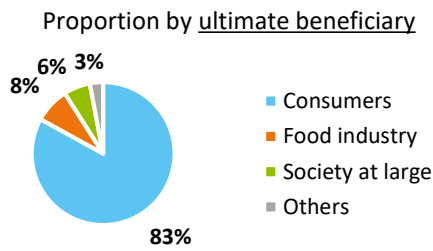


From the policy mapping it emerges that the share of environment-related food policies acting through the food industry is rather small (11%). However, industrial activities in food production, processing and distribution and the conditions of the surrounding environment are inevitably bounded up together.

Could the food industry represent a strategic player through which the negative effects of the agri-food sector on the environment could be tackled?

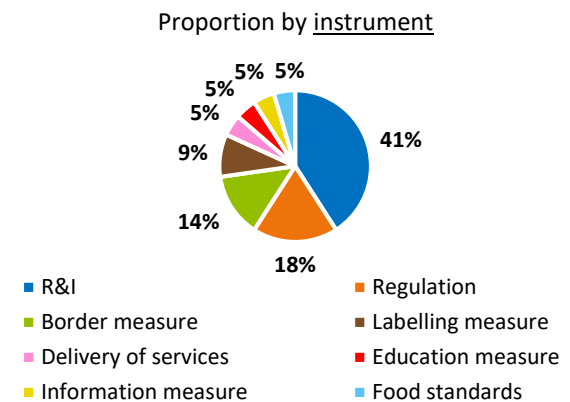
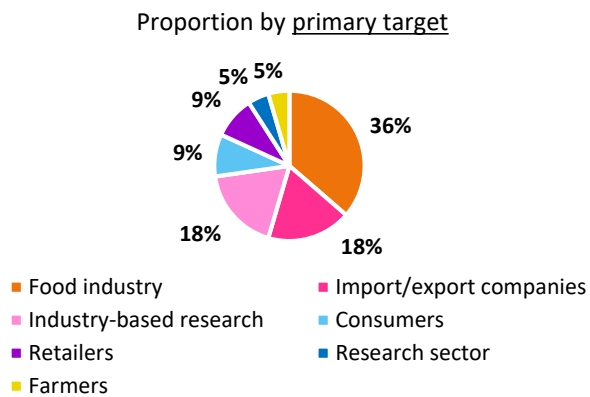
Food industry as a food policies' *primary target*

As expected, the vast majority of food policies targeting the food industry ultimately benefits **consumers** (83%) by adopting voluntary or mandatory **food standards, regulations and labelling measures**.



Food industry as a food policies' *ultimate beneficiary*

Those food policies aimed at benefitting the food industry in the long run are, in most cases, directly addressed at the **food industry** (36%) and **import/export companies** (18%) from the beginning, mostly via **R&I instruments, regulations and border measures**.



23% of the mapped policies acts through the **research sector** to benefit the food industry, while **41%** of them adopts **R&I instruments** to achieve so. *Considering the relevance of R&I to benefit the food industry, is there room to increase the share of public research as a primary policy target?*

Relevant related trends in the food system



Source: FIT4FOOD2030 (2018), "Trends in the food system", D2.1