

2020-2021 Highlights



President's foreword

The COVID19 pandemic has put our economies under serious strain for over a year already. As vaccinations accelerate, we only start now to envisage cautiously getting out of the crisis mode.

The food sector has shown considerable resilience. After last year's pressure on the vegetable oil demand, due to biofuels and catering breakdown, we have seen slow recovery for the demand for oils dependent on re-opening of the catering sector. Lower domestic rapeseed oil demand has been offset by exports. Demand for oilseed meals continued to be sustained.

All in all, the crushing activity was driven by good demand for both oil and meal. Refining still waits for the activity to take up again and bring higher capacity utilisation.

The European Green Deal ambitions have started to be translated by the Commission into specific initiatives, giving rise to numerous roadmap and stakeholder consultations. FEDIOL has dedicated a lot of efforts to provide feedback and even detailed positions. The submission of legislative proposals may be somewhat delayed when the complexity of the topics requires careful weighing, but many proposals are expected to be released around summer 2021. Current pressure on the carbon market confirmed the need for us to dig more into the Carbon Border Adjustment Mechanism expected soon. Enhanced ambitions for the climate will lead to the release of the "fit for 55 package" in July, followed by the deforestation and due diligence initiatives. FEDIOL got actively involved in the Code of Conduct for responsible business practices to be launched later this month.

While in 2020-2021, we dedicated a lot of time and attention to the Green Deal initiatives, other regulatory activities were still closely accompanied: implementation of maximum levels for 3-MCPD esters, developments in preparation of the up-coming new EFSA opinion on mineral oil, problems related to maximum residue levels of pesticides, Nutriscore and the front-of-pack discussions.

We also decided to resume work on Life Cycle Assessments with a comprehensive package that will be elaborated with a view to supporting members in improving environmental performance.

I will hand over my mandate as FEDIOL President a year earlier than foreseen, but I know that my successor can count on strong support from Board members. I would like to thank our dedicated and engaged experts involved in the working groups as well as the highly competent FEDIOL team for their excellent work during this particularly difficult year of COVID19 pandemic. They will no doubt take up the many challenges the Green Deal implementation will imply.

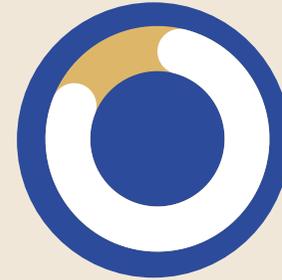
You will find in this report 2020/2021 all the key priorities and major achievements as well as reference to many other important topics. Indeed, other files stayed high on our agenda, notably the actions led by the European Bioeconomy Alliance, trade, biofuels, taxonomy, salmonella and new genomic techniques.

Roger Janson
President



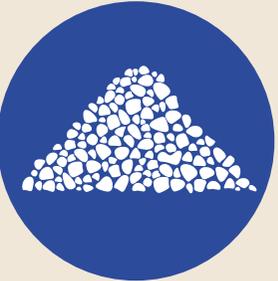
Facts and Figures

41.2 mt oilseeds crushed



85% of the market

27 mt of meals produced



180 plants

14.2 mt of oils produced



70 companies



18.4 mt of oils refined

20 000 direct jobs



of which 6.7 mt tropical oils



25.1 billion € turnover

FEDIOL in action

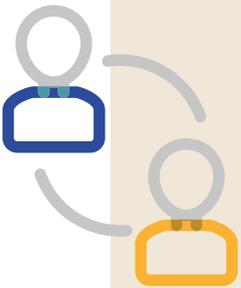
Public

- 4 Press releases
- 67 Positions, Statements, Letters
- 12 Responses to Commission consultations
- 3 Videos
- 6 Infographics



Meetings & Conferences

- 62 With EU institutions
- 80 Stakeholders coordination
- 73 FEDIOL expert meetings/calls
- 76 Conferences / events attended
- 7 Events / workshops organized



Statistics & Databases

- 53 Statistical updates
- 22374 Contaminants & pesticides residues data processed

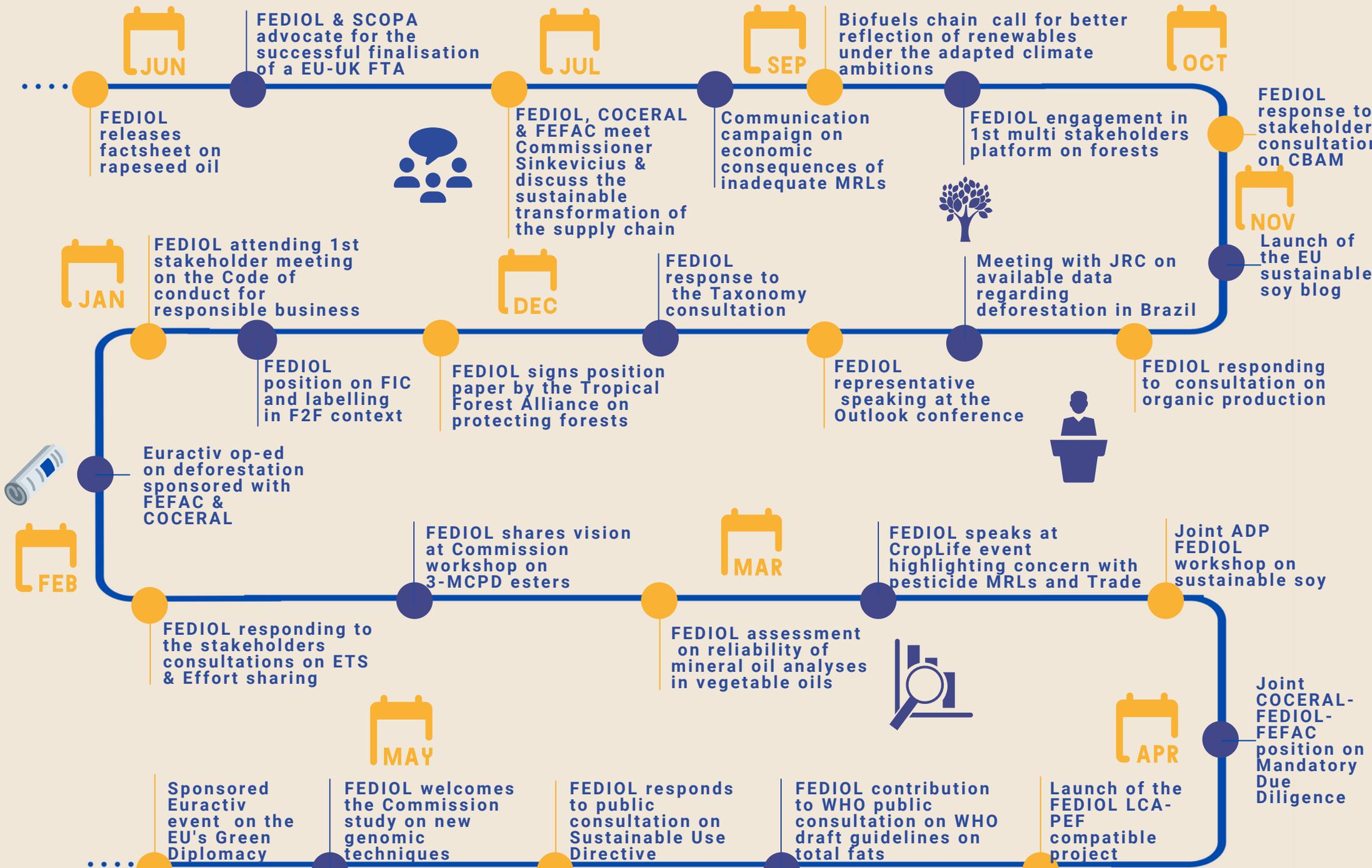


Communication

- 185K Website visitors
- 1180 Extranet users
- 715 Twitter followers
- 560 Twitter posts
- 492 LinkedIn followers



2020-2021 Milestones



Roadmap priorities

Product Safety & Consumer info Working Group

Transforming food systems

Meaningful labelling

Enhanced environment

Food & Feed Safety

Salmonella
MOH
Other contaminants
Pesticides

COOL
Nutrition
FOP

Climate
ETS CBAM
Sustainable sourcing
Industrial emissions

Environment & Sustainability Working Group

Climate neutrality + sustainability

Supply Chain Working Group

Ensure functionality & sustainability in agrifood markets

RED 2030
Bioeconomy
Trade

Deforestation
NGTs
CAP & Agri production

Functioning markets

Available & sustainable resources



FEDIOL priorities

Product Safety

Activities ✓

✓ Mineral Oil

Supported multiple work streams, including analytics, occurrence, toxicology, contamination pathways, prevention, mitigation, with a view to enhance knowledge and improve the science base ahead of the EFSA assessment and help industry address the presence of mineral oil in its raw materials and products.

✓ 3-MCPDE

Supported the regulatory process leading to the introduction of Maximum Levels for 3-MCPD esters, which are in place since 1st January 2021, through considerable industry investments in mitigation and prevention technologies. This has contributed to enhance food safety as our knowledge base advances.

✓ Salmonella

Supported the German national member organisation OVID in the outreach towards federal and regional authorities on a system for control of Salmonella during oilseed processing that allows for a balanced and step-wise intensifying response on Salmonella findings.

✓ Code of conduct

Actively contributed to the formulation of aspirational objectives that reflect the voluntary action and efforts undertaken by the oilseed crushing and refining sector to address and mitigate climate change. Underlined the need for appropriate references to bioeconomy, to the recognition of food safety as continuous challenge and for the need for enablers, as necessary elements in support of the objectives. Signed the Code and endorsed contributing to aspirational objectives #1, #3, #4 and #7.

Community



12 Working groups meetings

15 Stakeholders meetings

Deliverables



28 Positions

17 Input to consultations

2 Scientific articles

18K Data processed

✓ Pesticides

Provided evidence and information on the FEDIOL theoretical approach to processing factors for pesticide residues in crude vegetable oils, as a pragmatic tool when no specific information is available. Shared the industry's views that viable alternative substances to protect plants and that investments in new agricultural methods are urgently needed to meet the Farm-2-Fork objectives. This, along with new varieties allowing to better resist pests and to adapt to more difficult agronomic conditions can help agriculture meet strengthened sustainability objectives.



FEDIOL priorities

Meaningful Labelling

Community 

4 Working groups meetings

5 Stakeholders meetings

Deliverables 

4 Positions

2 Input to consultations

1 Factsheet

Activities ✓

✓ Nutrition labelling

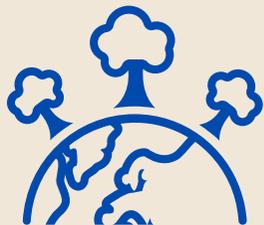
Developed and provided concrete criteria that any EU Front of pack nutrition labelling (FOPNL) should meet to address bottled vegetable oils and fats in line with national dietary guidelines and EU health and nutrition claims, into the new regulatory process to revise the FIC Regulation. Assessed in detail existing national FOPNL and developed concrete suggestions for vegetable oils and fats.

✓ Country of origin labelling (COOL)

Contributed to the industry guidance on voluntary COOL with Primary Food Processors, Food Drink Europe and Eurocommerce, following the publication of the implementing EU Regulation on voluntary COOL. Monitored and provided input on mandatory COOL into the initiation of the EU regulatory process revising the FIC Regulation.

✓ Nutrient profiles

Actively engaged in different EU fora by providing information on the nutritional aspects of vegetable oils and fats based on scientific evidence. Monitored and provided input into the initiation of the EU regulatory process revising the FIC Regulation.



FEDIOL priorities

Enhanced Environment

Community

27 Working groups meetings

21 Stakeholders meetings

Deliverables

24 Positions

9 Input to consultations

Activities ✓

✓ Taxonomy

Provided an assessment on this new work stream and acted in the relevant fora to raise the profile of our industrial activities, in the context of the biofuel and bioeconomy streams, to underline the need for policy coherence and balanced approach in the formulation of the environmental criteria for a number of sustainable activities.

✓ Carbon Border Adjustment Mechanism

Raised publicly considerations on a carbon border adjustment mechanism for products from oilseed processing and vegetable oil refining as an alternative for being on the EU ETS list of sectors at risk of carbon leakage. Engaged with DG Climate Action on this topic as the first agro food chain sector having done so, with a view to assess practicalities and implications.

✓ Life Cycle Assessment

Started a project on updating the environmental life cycle assessment study of 2013. The deliverables currently in progress aim for an LCA method for products from oilseed processing and vegetable oil refining that to a large degree is broadly compatible with the European Commission product environment footprint method and for sector representative results on the environmental impact of products from these activities. It will also deliver a tool for oilseed processing and vegetable oil refining companies to calculate environmental impact results for their own products. The project took off, pursuing an early 2022 deadline.



Available & Sustainable Resources

Activities ✓

✓ New Genomic Techniques (NGTs)

Raised concerns on the practical implications of the French decree on in vitro-mutagenesis, which has been put on hold, pending the EU study on new genomic techniques.

Continued to emphasize the need for an urgent adaptation of the current EU legal framework for new genomic techniques and welcomed the release of the study as a positive signal and outlook for a change in the legal environment and for enhancing the technological tools available to farmers.

✓ Agricultural Production

Got actively involved in debates on the Farm to Fork strategy, underlining the need for a balanced approach on organic farming, to avoid the downscaling of EU oilseed production volumes and hence the increase of the EU dependency on protein imports. Contributed to the up-date of the protein balance sheet for feed materials. Continued to emphasize the need for having adequate tools and technologies available to EU farmers with a view to respond to climate and sustainability challenges.

✓ No-deforestation

Actively engaged in discussions over the potential elements of a European legislative approach against imported deforestation, both via the elaboration of positions and the outreach to EU institutions, and by exchanging views with our partners in producing countries and the broader stakeholder community. Monitored the elaboration of regulatory discussions and raised, jointly with FEFAC and COCERAL, the importance of a balanced approach that considers the relevance of private sector's initiatives towards sustainable practices.

Community

15 Working groups meetings

46 Stakeholders meetings

Deliverables

4 Positions

3 Workshops organised



FEDIOL activities

Functioning Markets

Community



- 8 Working groups meetings
- 20 Stakeholders meetings

Deliverables



- 10 Positions
- 3 Input to consultations
- 2 Events organised
- 40 Statistical reports

Activities ✓

✓ Renewable Energy Directive

Monitored the progress in the implementation of the delegated and implementing acts under the RED II, participating in ad-hoc stakeholder workshops and consultations to share our views on the different elements of the legislation. Liaised with other players in the biofuel supply chain to develop a position on the future regulatory framework, in view of the higher climate objectives set by the European Commission.

✓ Bioeconomy

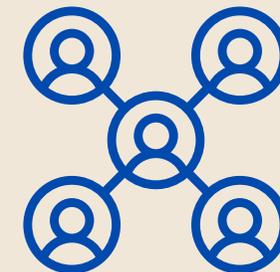
Continued the involvement in the established European Bioeconomy Alliance to raise awareness on the need for enabling policy conditions for the development of a bio-based economy, via the assessment of several EU pieces of legislation to create synergies between the existing targets and the positive role of the bioeconomy in meeting them.

✓ Trade

Ensured the participation in trade agreements' post-implementation reviews via the membership in different EU's Domestic Advisory Groups focused on assessing the chapters on sustainable development.

Provided relevant data on volumes and statistical trends via reports on monthly oilseed crushing and vegetable oils refining, annual palm oil and palm kernel oil sustainable volumes, split end-use of vegetable oils.

FEDIOL is a member of



FEDIOL is actively engaged in many other coalitions and cooperations at EU level.

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