



The Vital Link in the Food Chain

Brussels, 11 July 2025

EU Code of Conduct on responsible food business and marketing practices

Primary Food Processors' (PFP) annual report 2025

1. General information

Name in full + acronym	Primary Food Processors (PFP)
Contact person with contact details	Giovanni Tamburini info@pfp-eu.org
N° in the transparency register*	71338036982-24
Date of signature of the Code	20 December 2021
Step of the food chain represented (ex: primary production, production, processing, trade, retail, ...)	Primary processors of agricultural raw materials
Who do you represent? (e.g. number of members, companies, SMEs)	European Associations representing six different processing sectors (CEFS, ECA, EFM, EUVEPRO, FEDIOL, StarchEurope) and including over 4.000 companies

* if available

European Associations pledge to:

2. endorse the aspirational objectives set out in this Code (where applicable)

- ✓ Primary Food Processors (PFP) continue to endorse the aspirational objectives set out in this Code of Conduct on Responsible Business and Marketing Practices relevant for its activities and sets up actions that drives particular attention of members towards certain aspects of the Code.

3. promote and disseminate this Code with(in) their constituency/ies;

- ✓ Over the past reporting year, PFP News Brief issued for members four times a year was used to share Code of Conduct related topics and actions across the whole PFP membership.

- ✓ The relevant aspirational objectives were discussed in different PFP groups, notably within the Environmental team, which is particularly active, with a view to enhance knowledge and general understanding of the challenges at industry level and share experience of members. Primary food processors over the past year, focused on specific objectives of the Code:
 - **Aspirational objective 3** A climate neutral food chain in Europe by 2050.
 - **Aspirational objective 4 a)** Improved resource-efficiency within own operations, contributing to sustainable, efficient use and management of energy and natural resources in operations by 2030.
 - **Aspirational objective 5:** *Sustained, inclusive and sustainable economic growth, employment and decent work for all* with a particular focus on improving business resilience and competitiveness.
- ✓ Early 2025, PFP decided to set up a competitiveness/energy expert group to focus on the needs of PFP member companies to define decarbonisation pathways, overcome impediments and make appropriate investments. The expert group has proven useful to learn from shared experience and better scope and structure initiatives that will lead to decarbonisation in the industry (scope 1 and 2).

4. encourage their members to align their sustainability actions and/or business practices to the aspirational objectives and targets of the Code and invite them, on a voluntary basis, to adhere to this Code, as appropriate;

- ✓ PFP has been preparing workshops for its member companies, which will be held in the second half of 2025. One of the workshops is meant to raise awareness of the requirements of the Industrial Emissions Directive and the revision of the Best Available Techniques Reference Documents. The other workshop will focus on the upcoming report "Incentives for climate change mitigation across the agri-food value chain" commissioned by DG CLIMA and delivered by Trinomics, IEEP, Ricardo plc, and Wageningen University & Research. During the workshop PFP will gather and discuss input on policy options and their design to support effective climate action within the agri-food sector, to better understand preferences and identify effective policy design options for the primary food sector.

5. continue to engage in dialogue with other food chain/systems actors and EU and international policymakers to forge (new) relationships, exchange good practices and discuss challenges encountered, learn from each other (studies, projects) and create better mutual understanding, and identify opportunities for collaboration and potential partnership.

- ✓ Primary Food Processors (PFP) hosted on 29 April 2025 a high-level discussion on the theme "From Field to Market: Unlocking the Competitive Edge of Primary Food Processing", which aimed at sharing experience with competitiveness challenges. In light of increasing global competition, price volatility, and decarbonisation demands, this event focused on how to ensure the different players in the chain, including primary food processors, could stay competitive while also pursuing other objectives. The event provided an opportunity to engage with other stakeholders and policymakers on the topic.

- ✓ Primary Food Processors commissioned Wageningen Economic & Social Research to study and to provide a highlight of the strengths, weaknesses, opportunities and threats to, primary food processing in the current context. The Wageningen researchers highlight the contribution of the sectors, including as an outlet for farmers, processing around 250M tonnes of agricultural raw materials, and contributing to 1.2 million jobs, including over 137,000 direct jobs. They underline that low profit margins make Primary Food Processors sensitive to external factors while the pressing need to decarbonise and increasingly complex EU legislation pose multiple challenges to the continued efficient operations. The study is helping members of PFP to better understand the most relevant challenges and prioritize their efforts in implementing transition pathways.