

Annual report on the EU Agri-Food Code

General information

Name in full + acronym	EuroCommerce
Contact person with contact details	Els Bedert bedert@eurocommerce.eu
N° in the transparency register	84973761187-60
Date of signature of the Code	19 June 2021
Step of the food chain represented (ex: primary production, production, processing, trade, retail, ...)	Retail and Wholesale
Who do you represent? (e.g., number of members, companies, SMEs)	34 Company members 27 National associations 15 Affiliated EU associations Members

- Endorse the aspirational objectives set out in this Code.

By endorsing the code, we subscribe to its aspirational objectives and inform and engage our membership in meeting these objectives. We also support reaching these aspirational objectives via our participation to the activities organized within the remit of the Code of Conduct and through our membership in various EU platforms (Food Waste, Animal Welfare, EBAF, European Food Forum, sustainable food systems, MAC, Expert Group on Waste, and civil dialogue groups) and presence at international organisations, such as the [Consumer Goods Forum](#), and [Efficient Consumer Response](#) (ECR).

We regularly produce reports covering subjects that are part of the Code's objectives, specifically our annual report on grocery retail together with McKinsey, our report on climate net-zero emissions (2024) in partnership with Oliver Wyman and our most recent report on Protein Diversification in Retail and Wholesale (2026) and our yearly State of Grocery Retail Report.

- Promote and disseminate this Code with(in) our constituency.

EuroCommerce has continued to inform and engage its members on the implementation of the Code of Conduct and the activities organised within its remit, despite the continued considerable workload brought about by the increasing focus of the Commission on competitiveness.

Information and exchanges primarily take place via our biweekly WG F2F meetings, where members are updated on the Code's developments and are encouraged to contribute to its further growth and success. This working group consists of +/- 70 member representatives from our membership (hence beyond signatories).

We allocate time for exchange during our Food Committee meeting (3x per year) and in the Status Report prepared ahead of this meeting. We are reaching around 200 experts via this channel. We also report in our biweekly newsletter to all members.

In addition, EuroCommerce serves its members through our dedicated wholesale interest group and SME interest group. The SME group debates and outlines specific SME needs in EU policy development. This group was informed about the new agrifood code of conduct tool developed under the cluster collaboration platform and the AgriFood Platform.

EuroCommerce's website includes examples/best practices of our members' sustainability efforts – which is part of our commitment under the Code: <https://www.eurocommerce.eu/farm-to-fork/>

- 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.

The CoC is a priority listed in our Food Committee annual workplan. Nevertheless, the continued high workload - with many legislative files currently considered for simplification or needing preparation for implementation - again absorbed most of our members' attention due to the high impact these developments might have.

EuroCommerce continued to refer to the Code and its ambitions when speaking at stakeholder events.

- Explore the possibility of developing sector-specific tools and resources in support of this Code.

In April 2026, we published the sixth version of the joint McKinsey/EuroCommerce state of grocery report covering the year 2025 and following earlier versions (*see annex*).

These reports provide consumer insights on sustainability issues in relation to food. It reports on challenges for our sector as well as current market trends based on consumer surveys (+/-15.000 Consumers) and CEO interviews.

Many companies have made SBTi¹ carbon emissions reduction commitments and several of our association members have developed roadmaps to reach net zero.

We are an engaged partner of the ECR Community whereby our members and other companies exchange practical learnings, such as how to prevent food waste ([ECR retail loss group](#)), on category management or packaging.

¹ Science -based target initiative: <https://sciencebasedtargets.org/>

- 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.

We continued to engage closely with other food chain EU association members, as members of the CoC liaison group, and at dedicated Code of Conduct events and workshops. We have become a member of the European Food Forum which provides further opportunities to engage on a number of topics. We contributed to several workshops organised by the Commission such as “Food 2040 for competitive, sustainable and resilient food systems”, discussions on the European Commission’s new On-Farm Sustainability Compass, the EU Food Dialogue. Additionally, we also contributed to OECD workshop on food waste in February, the VISIONARY & ENFASYS conference and the Rosetta project.

We hosted different webinars such the Retail Large Scale Partnership webinar focusing on upskilling and reskilling is so important for the future of work, an online information session on the Capitals of Small Retail 2027 awards and our yearly Retail Innovation Summit. In 2025, we attended the Plant Food Summit 2025 organised as part of the Danish Presidency of the Council of the European Union and the Next Bite 2025 Conference.

A sample of interactions at European level

The Foodies Awards: promoting SMEs across Europe’s food chain

[LinkedIn Post](#)

Under the framework of the [Agri-Food Code](#) together with partners across the food chain, we have officially launched [The Foodies Competition](#). The award was created to spotlight small and medium-sized enterprises that contribute to a more sustainable, innovative and resilient agri-food chain.

Connecting policy, practice and the food chain: protein diversification – 7-9 April 2026, Brussels

[LinkedIn Post](#)

As part of the Retail & Wholesale Week at the European Parliament, we organised a series of “Hear from the expert”. On the closing day, we hosted a focused discussion dedicated to protein diversification and the journey of pulses and legumes.

While discussions around an EU Protein Strategy are not new, the exchange confirmed that they are gaining renewed importance in today’s geopolitical context. For retail and wholesale, protein diversification is a strategic topic. Companies are expected to support the transition towards a more sustainable, resilient and competitive food system, while at the same time responding to consumer expectations, price sensitivity and operational realities in complex supply chains.

Protein Diversification Roundtable – 25 March 2026, Brussels

[LinkedIn post](#)

A roundtable discussion on protein diversification took place at the European Parliament, on 25 March featuring presentations and panel discussions with stakeholders from across the value chain.

The event was hosted by MEP Strolenberg. Participants stressed the need for aligned, supportive EU policymaking to accelerate innovation, reduce investment risks, and provide clarity on key issues such as Scope 3 and CO₂-reduction methodologies, which are vital for credible and comparable measurement across the value chain.

During the meeting, our fellow Niklas Hermes-Böhlefeld, who joined EuroCommerce for six months as

part of the [School for Moral Ambition's](#) 'Food Transition Fellowship', facilitated a structured discussion together with panellists from across the food chain. The exchange highlighted the role of consumer insights, effective nudging and communication, the importance of harmonised methodologies, and the critical value of partnerships. Bringing these perspectives together helped identify shared barriers and opportunities.

European Food Forum (EFF) event: how to build trust in protein diversification across the entire value chain – 28 January 2026, Brussels

We contributed with our views in the panel on building trust with consumers. Participants examined what works, what is missing, and how EU policy can help unlock a diversified protein future that is trusted, sustainable, and fit for the future.

European Food Forum (EFF) event: "Is Food the Solution? The Safe Hearts Plan for a Better European Life" - 27 January 2026

We contributed to the panel and explored with stakeholders how Europe can strengthen cardiovascular prevention through effective food and nutrition policies that support innovation in the food system, while examining successful policies from other countries.

EuroCommerce at OECD & DG GROW Event on Retail SMEs -14 January 2026

Hosted by the **OECD Centre for Entrepreneurship, SMEs, Regions and Cities (CFE)** and the **European Commission's DG GROW**, the final report of their joint project on *The Twin Transition and the Future of Retail SMEs in Urban and Rural Areas* was launched. The report explores how small and medium-sized retailers across the EU are adapting to digital and green transitions and provides policy recommendations to support their competitiveness and workforce development.

Breaking through the burdens: Women in Retail – Leadership, Entrepreneurship, Barriers & Opportunities – 18 November 2025

During the Working Breakfast, hosted by MEP Marion Walsmann and organised in partnership with SME Europe and EPP, we discussed how we can break down these barriers and build a stronger, more inclusive future for women in retail and wholesale.

Exchanges via European platforms

- [Market advisory Council on fisheries \(MAC\)](#) – The MAC is a stakeholder-led organisation composed of representatives of the entire seafood value chain (primary producers, processors, traders, suppliers, retailers, trade unions) and other interest groups (NGOs). The MAC provides advice on a broad range of topics including sustainability labelling and the future framework for sustainable food system. In 2025, advice was formulated on the Fisheries Control regulation, trade aspects, animal welfare, *and much more*.
- [EU platform on food losses and food waste](#) - The EU Platform established in 2016, brings together EU institutions, experts from the EU countries, international organisations and relevant stakeholders. The Platform aims to support all actors in defining measures needed to prevent food waste; sharing best practice; and evaluating progress made over time. EuroCommerce is a member and is actively contributing in the 'Action & Implementation', 'Date marking and Food Donation' sub-groups and facilitating the sharing of best practices in the sector.
- [EU platform on animal welfare](#) - The 'Platform on Animal Welfare' aims to develop and exchange of coordinated actions on animal welfare with a particular focus on: better application of EU rules, through exchanges of information and best practices and the direct involvement of stakeholders; the development and use of voluntary commitments by businesses to further improve animal welfare;

the promotion of EU animal welfare standards to valorise the market value of the Union's products at the global level. Our membership was extended under the new mandate running.

- [European Circular economy stakeholder platform](#) - A joint initiative by the European Commission and the European Economic and Social Committee which includes work on packaging (among others). EuroCommerce is part of the coordination group.
- [Commission Expert Group/Multi-Stakeholder Platform on Protecting and Restoring the World's Forests, including the EU Timber Regulation and the FLEGT Regulation](#) - The platform was launched to help protect and restore world's forests brings together an unprecedented range of stakeholders and expertise: consumer and producer countries, civil society organizations, and industry associations.
- [European Commission's Expert Group on Waste](#) – The group assists the Commission in relation to the implementation of existing Union legislation, programmes and in the preparation of delegated acts. As part of our engagement on the Packaging and Packaging Waste Regulation, we joined.

Annex

(June 2026) Protein Diversification in Retail and Wholesale

Protein diversification is increasingly recognised as a promising response to the pressing challenges facing Europe's food system. These include climate change, growing pressure on other environmental resources, and a continued reliance on imports for protein crops and oilseeds.

For the retail and wholesale sector, protein diversification could offer opportunities to strengthen environmental sustainability and enhance supply-chain resilience. Yet progress remains constrained by barriers on both the demand and the supply sides.

Protein diversification is about leveraging the benefits of all protein foods – including food of animal origin. The livestock sector plays a critical role in the food system, including in balanced diets and especially in regions where arable farming is difficult.

This report focuses on alternative proteins, which are still underdeveloped and require support to unlock their full potential and enable a well-balanced, complementary food system – both in terms of production and consumption, combining all protein sources and technology solutions. This can help leverage the advantages of all protein sources and achieve a more sustainable and healthier balance in the food system.

This report is intended to stimulate informed discussion on protein diversification. It has been created as part of the School for Moral Ambition Fellowship. Several retail and wholesale companies and national associations contributed to its development through a voluntary survey, interviews, and feedback. These inputs reflect a diversity of perspectives, which the report seeks to represent in a balanced way. Unless explicitly stated - such as in the interviews with retail companies – the views expressed should not be attributed to any specific contributor.

(Edition 2026) The State of Grocery Retail in Europe 2025

As we look at 2025, the market environment looks relatively stable on average. But beneath the surface, we see significant shifts across customer segments, channels, and value propositions, creating new opportunities for grocery retailers. For grocery retail CEOs, stabilisation does not mean relief.

Consumer behaviour remains cautious and highly vulnerable to price developments. This keeps pressure firmly on margins and makes the case for pan-European synergies and strengthening private brands stronger.

At the same time, leadership teams are prioritising investment: capital intensity is edging up, and spending on digital and AI outpaces industry growth. The imperative for 2026 is clear - ensure that rising investments in AI and technology translate into concrete improvements and resilience.

(Edition 2025) The State of Grocery Retail Europe 2024

2024 was a year of mixed emotions for European grocers. Volume grew again, albeit slowly, some consumer segments traded up, and AI has been creating value for some grocers. Now, looking ahead to 2025, cost pressure remains high, some supply chains are highly volatile, and many shoppers are still cautious as economic pressure persists.

Questions from grocery executives mirror the mixed picture of 2024: How can grocers attract the more affluent shoppers as well as those whose sensitivity remains high? What will the “shopper of tomorrow” look for? How can opportunities from sustainability be captured? Finally, how can grocers benefit from data and AI most effectively?

For this report, 14,000 consumers and over 30 grocery executives from more than a dozen countries across Europe were surveyed. Additionally, we interviewed four grocery CEOs. *Developments regarding possible tariffs or other trade restrictions that unfolded in March 2025 are not reflected.*

To mark the fifth anniversary of The State of Grocery Retail Europe publication, various new features, including a five-year outlook, were added a data-driven analysis of the signature practices of successful grocers, and a proprietary volume growth model to inform the assessment of growth opportunities in different parts of Europe.

(June 2024) [Net Zero Game Changer: Tackling the hidden carbon footprint in European retail and wholesale value chains.](#)

Our joint report aims to shed light on the carbon footprint of the sector in Europe and its value chains around the world. Besides providing insights into the status quo, it aims to set out a path towards a more sustainable future across four retail and wholesale subsectors: food and beverage and health and beauty, textile and apparel, consumer electronics, and home and do-it-yourself (DIY).

We hope to inspire and guide practitioners in the sector towards adopting low emission practices. The challenges posed by climate change require a collective effort, and this study seeks to empower stakeholders across the full value chain with data and analysis that will allow them to take decisive action toward a more sustainable future.

This report is the result of a collaboration between EuroCommerce and Oliver Wyman.

The key takeaways:

- **Impact:** The sector's value chains contribute nearly a third of Europe's CO₂e emissions of which 98% are in scope 3 (outside its direct control).
- **Action:** It's time to act decisively on carbon reduction to meet our targets. Sitting at the nexus between suppliers and consumers, retail and wholesale are pivotal in facilitating changes that will help cut CO₂e emissions.
- **Collaboration:** Only through collective efforts can we achieve meaningful change. This needs the right framework and support with agreed methodologies and efforts to ensure data are comparable and reliable.

Earlier editions

(Edition 2024) [Signs of Hope: The State of Grocery Retail in 2023](#)

(Edition 2023) [The state of grocery retail: Living with and responding to uncertainty](#)

(Edition 2022) [Transforming the retail and wholesale sector](#)

The 2022 report by EuroCommerce in partnership with McKinsey **on transforming the retail and wholesale sector** shows that necessary **investments** and the pressure to invest are significant: Euro 230bn to achieve 90% reduction of scope 1 & 2 carbon emissions in our sector and Eur 35bn for circularity.

(Edition 2022) [The state of grocery in Europe: Navigating the market headwinds](#)

(Edition 2021) [Disruption and Uncertainty – State of Grocery Retail 2021 report](#)