

Association de l'industrie de la fonte de fromage de l' UE
Association of the processed cheese industry in the EU
Vereinigung der Schmelzkäseindustrie in der EU



RAPPORT ANNUEL 2002 / 2003

ANNUAL REPORT 2002 / 2003

JAHRESBERICHT 2002 / 2003

ASSIFONTE

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ASSIFONTE
Godesberger Allee 157
D – 53175 Bonn
Tel: (++49 0) 228 959690
Fax: (++49 0) 228 371535
E-Mail: hetzner@milchindustrie.de
<http://www.assifonte.org>

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Contents	page
<i>Foreword</i>	5
1 INTERNATIONAL ECONOMIC DEVELOPMENT	6
<i>Slow economic growth</i>	6
<i>Employment lacks growth impulses</i>	6
<i>Convergence criteria missed</i>	7
2 THE COMMON MARKET	8
<i>Agenda 2000 approved</i>	8
<i>Stable COM expenditure</i>	9
<i>Export refund expenditure up</i>	9
<i>Cheese market keeps growing</i>	10
3 EUROPEAN COMMUNITY GROWS	11
4 EUROPEAN LEGISLATION	12
<i>EU directive on unfair trading practices</i>	12
<i>Genetics – new labelling and traceability rules</i>	12
<i>Decisions of EU Council of Minister on Food Hygiene</i>	12
<i>Controversial draft EU regulation on nutritional and health claims</i>	13
5 INTERNATIONAL DAIRY FEDERATION AND CODEX ALIMENTARIUS	13
<i>Belgium host in 2003</i>	13
<i>Codex-Standard for processed cheese</i>	13
6 PRIORITIES IN ASSIFONTE WORK	14
<i>Comité Directeur</i>	14
<i>General Assembly</i>	14
<i>Inward Processing</i>	14
<i>Co-operation with EDA</i>	15
<i>Advisory Committee Milk</i>	15
<i>New Service Offer of ASSIFONTE - www.assifonte.org</i>	15
<i>Closing Remarks</i>	16
<i>ASSIFONTE - Mitglieder</i>	17
STATISTICAL APPENDIX	21



Foreword

For ASSIFONTE, the year covered by the present report was mainly marked by the political discussion about the re-orientation of EU agricultural policy. The European dairy and processed cheese industry had already accepted the Agenda 2000 decided in 1999, with a 15 % price cut, provided that milk producers receive equivalent compensation to remain viable at all. Although the farm ministers followed this line in 2003, the extent and planned adjustment measures are not satisfactory. European member states are currently working to implement the decisions and everybody will try to implement the adjustments required with regard to the existing situation on the milk market. Structural changes will be unavoidable. This implies that many milk producers will leave the production process in coming years.

In the scramble between Agenda decisions and WTO negotiations, it was not possible for some time to discern the underlying driving forces. Is the agreement reached the result of over-eagerness to comply ? The failed Cancun negotiations in September have not yet proved that EU preparatory moves were right. What did become clear was that developing countries will not accept any bullying by big economic blocks.

Hopefully, the end of the peace clause will not disrupt the reduction of customs duties, as this is actually a welcome process. ASSIFONTE would be particularly affected, as the processed cheese industry is much more export-oriented than the rest of the dairy industry.

The EU stands on the eve of an enlargement to member states with an economy mainly geared to agriculture and that will add a good third to its population. The newcomers have to take over the *acquis communautaire*. This is a feat that cannot be achieved without difficulties.

Some processed cheese companies have already established a presence in the future member states. In the coming months, ASSIFONTE's task will be to encourage the new member states to join the European processed cheese association to jointly defend our interest with the European Commission. Moreover, ASSIFONTE offers a platform for the exchange of opinions and experience. This offer should be particularly attractive to new member states.

Alain Cougoulic
President

1 INTERNATIONAL ECONOMIC DEVELOPMENT

Slow economic growth

The positive indications of economic growth in the European Union, particularly at the beginning of the Euro era, have not continued in 2002. The gross domestic product of the Community grew merely by a single percentage point, and for 2003 no significant rise is expected. The smaller countries in the Community have been the main contributors to this growth, while the larger states, as e.g. Germany with +0,2 %, were clearly below EU average. It is interesting to note that European countries outside the EU also achieved low growth, as Switzerland and oil-producing Norway also achieved a mere 1% growth, while the United States with 2.4 % are on a clear growth trend with respect to Europe.

Economic indicators

	Real GDP (% last year)				Unemployed (% of gainfully employed)			
	2001	2002	2003	2004	2001	2002	2003	2004
Belgium	1,0	0,7	1,0	2,0	6,6	7,3	7,7	7,5
Germany	0,6	0,2	0,1	1,7	9,4	9,8	10,7	10,6
Finland	0,7	2,2	1,1	3,0	9,1	9,1	9,2	9,0
France	1,8	1,2	0,8	1,9	8,5	8,8	9,1	8,7
Greece	4,1	4,0	3,6	3,8	10,2	9,2	n.a.	n.a.
Ireland	5,9	6,9	2,5	3,0	3,8	4,3	4,3	n.a.
Italy	1,8	0,4	0,6	1,8	9,5	9,0	9,1	8,5
Netherlands	1,3	0,2	-0,1	1,4	2,4	2,8	4,1	4,6
Austria	1,0	1,0	0,6	1,5	3,6	4,1	4,0	n.a.
Portugal	1,7	0,4	0,2	2,2	4,1	4,3	4,0	n.a.
Spain	2,8	2,0	2,0	2,4	10,5	11,4	11,2	9,8
Danmark	1,0	2,1	1,0	2,0	2,0	1,0	1,0	2,3
United Kingdom	1,9	1,9	1,8	2,5	5,1	5,2	5,3	5,4
Sweden	1,1	1,9	1,5	1,9	4,0	4,0	4,7	4,5
EU-15	2,2	1,0	0,9	1,9	7,6	7,6	8,2	8,0
Switzerland	1,3	1,0	-0,2	1,6	1,7	2,5	3,7	3,5
Norway	1,4	1,0	0,8	2,0	3,6	3,9	4,4	4,5
USA	1,2	2,4	2,3	3,8	4,8	5,8	6,1	5,8

2003 = preliminary / 2004 = estimated - Source: Deutsche Bank Research

OECD estimates for the next two years are more positive. Smaller member states will again be the main growth contributors, but so will be the UK with an expected 2.5 % growth.

Employment lacks growth impulses

The described economic development in the EU has consequences on the employment situation in individual member states. In the Community, an average 7.6% of the working population was unemployed in 2002. There were diverging developments between EU member states. Other European states, such as Switzerland and Norway, are in stark contrast to EU figures. Their unemployment rate only equals half the EU rate.

The outlook for the coming years spells out a further worsening of the situation in 2003. Only in 2004 is the situation predicted to improve.

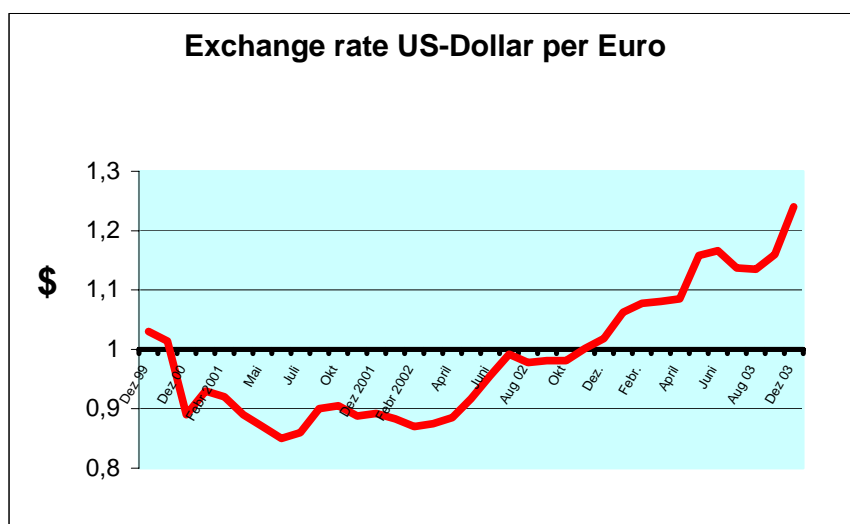
Convergence Status

	Inflation rate (% last year)				Budget balance in % of GDP				Debt in % of GDP			
	2001	2002	2003	2004	2001	2002	2003	2004	2001	2002	2003	2004
Reference value	3,2	2,9	3,0		-3,0				60,0			
Belgium	2,4	1,6	1,4	1,2	0,4	0,1	-0,4	-0,4	108,5	105,8	102,9	99,7
Germany	2,4	1,3	1,0	0,7	-2,7	-3,6	-3,8	-3,2	59,5	60,8	62,0	61,5
Finland	2,7	2,0	1,3	1,1	4,9	4,7	2,2	1,0	43,6	42,7	43,2	43,9
France	1,8	1,9	1,6	1,3	-1,6	-3,1	-3,6	-3,2	56,9	56,3	55,5	n.v.
Greece	3,7	3,9	3,5	3,1	-0,3	-1,2	-1,2	-1,0	107,0	105,0	100,7	97,6
Ireland	4,0	4,7	4,5	2,6	3,8	-0,1	-1,0	-1,5	36,8	33,0	33,2	34,3
Italy	2,7	2,6	2,6	1,8	-2,2	-2,3	-2,5	-2,3	109,8	108,0	107,4	106,2
Netherlands	5,1	3,9	2,5	1,7	0,1	-1,6	-2,3	-2,5	52,8	52,6	53,2	53,6
Austria	2,3	1,7	1,2	1,1	0,1	-0,6	-1,6	-1,5	67,3	67,9	67,6	66,4
Portugal	4,4	3,7	3,6	3,0	-2,2	-2,7	-2,9	-2,6	55,6	58,0	59,0	58,5
Spain	3,7	3,6	2,9	2,3	0,0	-0,1	-0,3	0,0	57,2	56,2	56,0	56,0
Danmark	2,3	2,4	2,1	1,9	2,8	2,0	1,8	2,0	45,4	45,2	43,3	41,6
United Kingdom	2,1	2,2	2,7	2,3	0,1	-2,2	-2,7	-2,4	39,9	38,1	36,9	n.v.
Sweden	2,8	2,6	2,2	1,7	4,7	1,1	0,5	1,0	54,4	52,4	51,0	50,4
EU 15	2,5	2,2	1,8	1,4	-0,6	-2,0	-2,5	-2,2	63,2	62,6	63,5	63,7
Switzerland	1,0	0,6	0,6	1,0	-0,3	0,1	-0,4	-0,2	50,0	50,0	50,5	50,5
Norway	3,0	2,3	1,5	2,1	14,4	10,0	8,0	9,0	28,0	27,5	26,5	25,0
USA		1,6	2,1	0,9		-1,5	-3,9	-3,5	27,5	26,7	25,7	n.v.

2003 = preliminary / 2004 = estimated - Source: Deutsche Bank Research

Convergence criteria missed

When the **€**uro was introduced, the European Union created convergence criteria to safeguard the valuation of the Euro in the community of nations. A set of reference criteria must be complied with to avoid jeopardising the value of the Euro with respect to other currencies. In 2002, only three member states did not achieve the convergence criteria. Germany and France significantly exceeded the 3% budget deficit limit, in the case of Portugal the inflation rate was cause for argument. The countries concerned have been shown a "yellow card" by the EU authorities, a warning with an indication to use internal instruments to achieve the commonly agreed targets. It is quite regrettable that two of the bigger countries have failed to comply. The currency pact is weakened as other member states might be tempted to act in a similar way in the future without having to worry about criticism.



In addition, there are three member states that do not belong to the currency union. Failure to comply with the convergence rules will encourage these countries to stand aloof and point out that the bigger partners in the EU do not uphold commonly agreed rules. The value of the Euro is affected by this. Those still outside the currency union are wary of getting dragged along without being able to defend themselves. As a matter of fact, the discussion about softening the convergence criteria is not sensible.

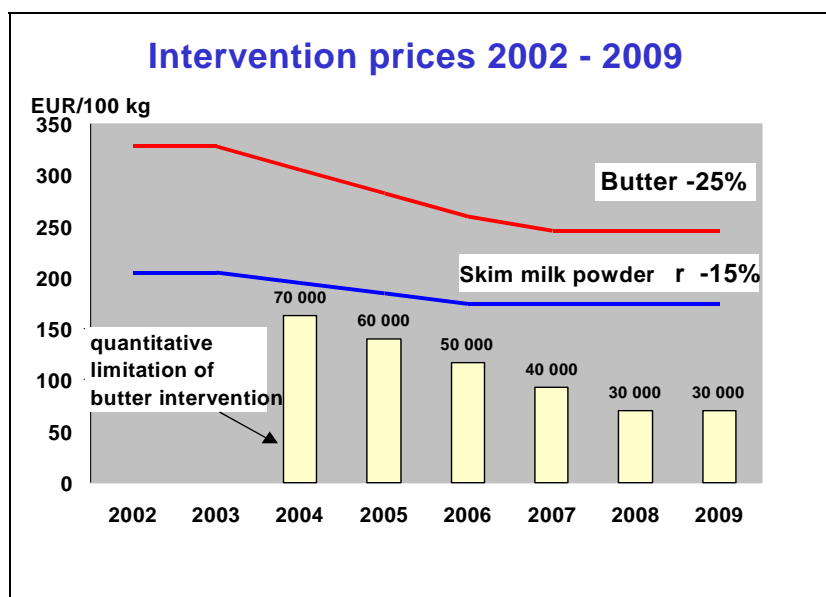
Despite the economic development in the member states, the rate of the US dollar against the Euro reached its peak in July 2001 but has come down again in the meantime. In November 2002, 1:1 parity was achieved for the first time followed by a further strengthening of the Euro. This development shows that speculation must have been an element at work, as the Iraq war started in early 2003. This has not remained without effect on currency rate developments. An all-time peak was reached in November 2003, when 1 Euro cost about US\$1.20. If real economic relations were to influence the US\$/Euro exchange rate in the future, a rate of 1:1 will probably be achieved over time. For the European industry, including the processed cheese industry, difficult times are ahead in external trade on account of these currency rate variations. Let's hope that the above assessment is right and the supply situation on the world market will improve.

2 THE COMMON MARKET

Agenda 2000 approved

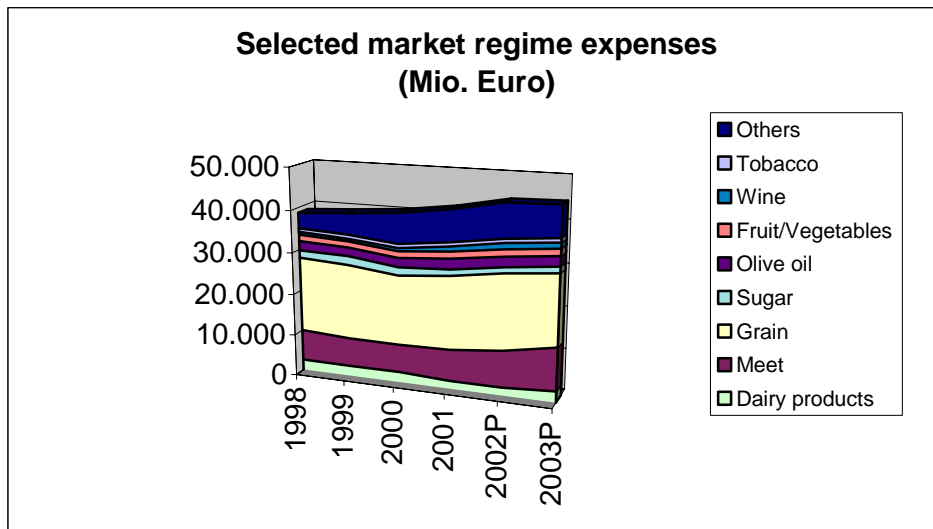
ASSIFONTE has closely followed the discussions about the Agenda 2000. Because of the special interest it represents, there was no direct intervention. We have fully seconded the interests of our sister organisation EDA and supported the position paper drafted by EDA.

The 1999 Berlin decisions were accepted by producers and processors. In the wake of so-called Mid-Term-Review, the European Commission produced an intermediary report in 2002 and tested the decisions again in the light of the reviews findings. The Agenda 2000 was also influenced by the start of WTO II negotiations, as the EU's negotiation partners demanded significant cuts in internal support and external protection, as well as much easier market access. The following price decisions were made



Stable COM expenditure

When considering the development of COM expenditure, the first thing to note is that the dairy sector has burdened the EAGGF (European Agricultural Guidance & Guarantee Fund) less and less for many years. In 2002, Euro 1.9 bn were spent, roughly the same amount as in the previous year. Milk, which after all accounts for 25% of agricultural income, only accounts for one ninth of budget expenditure as compared to arable crops, where expenditure for the cereal market is a particularly heavy burden on the books. However, in 2003 there will be a hefty increase. On account of the difficult situation on the European dairy market, the EU Commission had to use its market regulation instruments. Nevertheless, the share of milk in total EAGGF expenditure is still below 6%.



Export refund expenditure up

When considering COM expenditure on milk and dairy products according to utilisation, it appears that the position for refunds has further gone down in 2002 as compared to the comparable previous year. This reflects the drop in world market demand. However, demand increased again significantly at the end of the year, and promises satisfactory results in 2003, at least in terms of quantities. Support measures were also necessary, i.e. the payment of support for SMP processed into milk exchangers. The BSE crisis negatively and durably influenced meat consumption in 2001 and consequently demand for beef and veal. In the meantime, the situation has normalised again and demand for feed powder with SMP content is rising. However, the chart also shows that there was intervention, particularly in 2003 in the butter sector.

It can be concluded from these figures that the EU must step up its stabilising intervention as market conditions deteriorate, i.e. demand falls. However, when the extent of these measures is compared to previous interventions, they can still be considered acceptable. The Commission will also have to intervene to stabilise the market in the future. The negotiations at the WTO should provide some indications.

In a poll among the members of ASSIFONTE it was noted that inward processing was used extensively in exports. Estimates indicate that about 50 % of third-country exports are achieved in the framework of normal or special inward processing. Total export performance, which over many years amounted to about 125,000 t, has dropped to around 100,000 t. This is linked to the fact that processing companies have moved capacity to

third countries and/or produce in the new member states. After the enlargement of the European Union, third country exports will therefore again reach past figures, since the new members have their own commitments in countries outside the EU.

The discussion at the end of 2003 about the possible tendering of refunds for butter and SMP portends danger for inward processing. ASSIFONTE has therefore made massive efforts to provide conditions allowing to use this instrument also in the future.

EU – Cheese balance

1.000 t	2001	2002*	2003*
Production	7 418	7438	7 495
Import	175	156	180
Exports	469	484	500
- stock building	20	0	0
Consumption	7 103	7 110	7 175
- per capita(kg)	18.8	18.8	18.9



Cheese market keeps growing

In the year covered by the present report, cheese sales have achieved a positive overall performance. In 2003, production will reach nearly 7.5 m t. Most of the production increase is caused by exports. This positive development does not necessarily apply to the processed cheese sector, as will be shown below.

Third country markets have become more receptive than in previous periods. This applies particularly to Eastern Europe and to semi-hard cheese, which is again and increasingly being exported to Russia. Processed cheese exports have fallen, though. As already mentioned, this is due to production capacity being moved to third countries.

Processed cheese balance – EU15

in 1.000 t	1997	1998	1999	2000	2001	2002*)	2003*)
Production	516.7	521.0	520.0	545.0	541.0	544.0	535.0
Import	5.2	5.5	5.6	4.8	4.0	3.8	6.0
Export	121.9	114.6	102.0	107.0	102.0	100.0	93.0
Consumption	400.0	411.9	423.6	442.8	443.0	447.8	448.0
- kg per-capita	1.1	1.1	1.1	1.2	1.2	1.2	1.2

Production of processed cheese in the EU15 amounts to a mere estimated 535,000 t. Imports have increased on account of ever closer links with Eastern Europe. On the other hand and as explained above, exports to countries outside the EU are down. On balance, consumption inside the EU has therefore not changed significantly. Per-capita consumption is still 1.2 kg/year.



3 EUROPEAN COMMUNITY GROWS

Negotiations between the European Commission and the accession countries were intensified and completed in 2001 and 2002. For a long time, Poland, the most notable country among the ten applicants, used its prominent position to achieve the most positive result possible for its own agriculture. In 2003, the results of the negotiations were made public in the new member states, particularly to receive the approval of national parliaments and populations. In the meantime, all ten have approved accession in clearly positive referendums. Consequently, the EU15 will become the EU25 on 1 May 2004. The number of inhabitants and consumers will increase by around 75 m people. For the European dairy industry, the enlargement means an increase in milk deliveries by over 21 m t and additional production of processed cheese by about 100,000 t.

With a production of 330,000 t and domestic consumption of 270,000 t, the new member states have a butter surplus. As for SMP, it is expected that the products of our new partners will establish an increasing presence on the markets of the "old" EU.

With rising purchasing power, quality of dairy products but also costs, operating conditions will progressively adjust to those in the current EU15, so that the discrepancies expected at the beginning will probably even out over time.

Number of Inhabitants (in Mio.)

Poland	38,6	Romania	22,5
Czech Rep.	10,3	Bulgaria	8,2
Hungary	10,0		
Lithuania	3,7		
Slovakia	5,4		
Latvia	2,4		
Estonia	1,4		
Slovenia	2,0	EU 15	376,0
Total	74,1	EU 25	451,1

Milk production and quota (in t)

	Production 2001	Demanded	Granted
Poland	11.600	13.740	8.964
Czech Rep.	2.700	3.100	2.682
Hungary	2.000	2.800	1.947
Lithuania	1.700	2.250	1.646
Slovakia	1.100	1.236	1.013
Latvia	850	1.200	695
Estonia	650	900	624
Slovenia	640	695	560
Total	21.240	25.921	18.131
18 131 t are ca. 13 % of the total EU milk quota in 2004			

4 EUROPEAN LEGISLATION



EU directive on unfair trading practices

The EU Commission has finally produced a draft directive on unfair trading practices in EU internal trade between companies and consumers (COM (2003) 356 final). The objective is to reduce differences between national regulations on unfair trading practices.

Despite minimum provisions in existing consumer protection directives, the problem remains that member states adopt different provisions that go beyond the requirements of the directive and opt for different regulation models with a more or less extended scope of protection.

This causes both obstacles on the internal market and distortions in competition. The effects of this regulatory fragmentation are so serious that the EC Commission intends to remove these obstacles by legislating at EU level. The draft directive is now going through the legislative process; first consultations in the Council will take place in autumn 2003.

Genetics – new labelling and traceability rules

This year, the EU Council of ministers adopted the draft regulations on the authorisation, labelling and traceability of genetically modified foods and feeds. As a matter of principle, the future labelling obligation applies - unlike the current situation - also to foodstuffs in which genetically modified constituents cannot be identified directly. Milk and dairy products obtained from animals fed on genetically modified feed still do not need to be labelled in the future. The threshold for labelling in case of fortuitous or unavoidable contamination with GMO components is 0.9 %.

The regulation on the traceability and labelling of genetically modified foods and feeds was also adopted. It makes full traceability mandatory at any stage of the food chain.

The adoption of these regulations allows the EU to end the de facto suspension of the authorisation of any new genetically modified foods or feeds. Once the regulation has come into force, companies have 6 months to comply with the new labelling provisions.

Decisions of EU Council of Minister on Food Hygiene

On 22 July 2003, the EU Council of Ministers adopted a series of new regulations, including the hygiene regulation on official controls for animal products for human consumption, which will come into force 18 months after its publication. For dairy products it was decided in particular that products can be sold to consumers only if certain criteria are fulfilled.

The whole hygiene package of five draft regulations is now ready and is to be discussed at the agricultural Council meeting in September. Afterwards, it will again be forwarded to the European Parliament for final political adoption in June 2004. It is to come into force in January 2006 and will immediately apply in all EU member states.

Controversial draft EU regulation on nutritional and health claims

On 16 July 2003, Commissioner Byrne produced a draft EC regulation on nutritional and health claims. The Commission's draft will now be submitted to the EU Council of ministers and the European Parliament for further consultation and approval.

The draft has the legal form of a regulation and is therefore meant to be directly applicable in all member states. In parallel, the EC labelling directive 2000/13/EC and EC directive 84/450/CEE on misleading advertising remains in force and must be complied with. This causes considerable uncertainty about the enforcement of these provisions in practice and is therefore considered critically.

Specific conditions for banned and indirect health claims are set out as well as provisions concerning an EU register, data protection, the notification procedure of member states as well as national measures and procedures.



5 INTERNATIONAL DAIRY FEDERATION AND CODEX ALIMENTARIUS

Belgium host in 2003

The International Dairy Federation (IDF) is a global organisation, made up of more than 40 dairying states across the world. The share of milk production represented by the members amount to about 80 percent. The work of IDF is focused on the following areas :

- dairy legislation issues, i.e. co-operation in Codex Alimentarius
- hygiene-related production and processing processes
- dairy technology
- environmental protection and sustainability
- dairy sector micro- and macro-economics

This year, the IDF General Assembly took place in Bruges at the invitation of the Belgian national committee. The various themes were the object of interesting presentations and discussions.

Each year, the working group on trade and agricultural policy produces a "world dairy situation" report under the leadership of ZMP. The report not only covers global production, external trade and consumption developments, individual member states also have the possibility to add up-to-date national reports on particular local developments. This offers an overview of the development of the dairy sector across the globe.

Codex-Standard for processed cheese

The discussion about the future Codex A-8 standards (processed cheese) is extremely arduous, as three problem areas - product composition, authorised additives and labelling provisions - are still prone to contention. If the governments, which together with the IDF are to produce a draft in the Codex working group until the next meeting of the Codex Alimentarius Milk Committee, cannot find a compromise, the standard might be withdrawn. Processed cheese would then be subject to national legal provisions, which would raise obstacles in external trade.

6 PRIORITIES IN ASSIFONTE WORK

Comité Directeur

The CD met four times in the period covered by the present report. The discussion about the market situation is always at the top of the agenda. In summary: as prices for processed cheese raw materials rise the supply situation is becoming ever more difficult. Particularly the negotiations with discounters have proved extremely difficult.

In third country exports, some changes have appeared. Commitments in Eastern Europe are in the forefront.

The CD also decided to update the Anderson study carried out six years ago. It is not necessary to call upon the research institute to do this, as other institutes provide partial results that can be used.

To guarantee the broadest possible representation of the European processed cheese industry, the CD wants to woo five to six of the new member states as members in 2004. First initiatives have already been started. They have indicated that a fairly broad coverage of the European processed cheese industry can be achieved.

General Assembly

In the period covered by the present report, two General Assemblies took place, in Greece in 2002 and in Ireland in 2003. The events were organised jointly with EDA, sustainability of dairy processing being most prominent in the proceedings. In 2003, the European dairy industry was able to discuss with applicant states about the opportunities and risks arising from the enlargement of the EU.

Inward Processing

Inward processing still plays a decisive role in processed cheese exports. The political environment is being observed closely to avoid this instrument from being challenged. The tendering of butter and SMP, which is currently being discussed, should there for be considered all the more critically. The European Commission intends to introduce this regulatory instrument at the beginning of 2004. Fortunately, a host of imponderables might probably delay or even prevent the measure.

The equivalence principle plays an important role in inward processing. To ensure constant quality and availability, it is sometimes necessary to replace imported raw materials by EU products. In this respect, the European Commission wanted to introduce mandatory compliance with a set of criteria which, in practice, would have brought the whole system down. This vital instrument was discussed at the General Assembly and in the CD and appropriate activities we initiated, including direct discussions of our President Mr Cougoulic with representatives of the EU Commission as well as lobbying of national ministries by our member organisations. The French delegation was particularly successful. Only as a result of their lobbying, rules were defined that the European processed cheese industry can live with.



Co-operation with EDA

Partnership with EDA has been smooth for many years. Co-operation is particularly important in horizontal committees. Specific processed cheese interests are represented by ASSIFONTE alone.

The recent restructuring of the work in EDA has therefore not affected ASSIFONTE. The processed cheese industry derives its legitimacy to form an independent organisation from the fact that it does not directly relate to the raw material milk but uses processed dairy products as raw materials.

Advisory Committee Milk

Since the inception of the European Community and since the establishment of the so-called Advisory Committee "Milk", ASSIFONTE has had a seat on this committee, which allows direct contact with the EU Commission. Concerns and problems of the processed cheese industry can therefore be submitted directly to the European authorities.

New Service Offer of ASSIFONTE - www.assifonte.org

For many years, the members of ASSIFONTE have been kept abreast of ongoing developments that are important for the processed cheese sector. Through communication with our members, opinions can be exchanged and positions be formulated, particularly so in the discussion about the refund tendering system.

In October 2003, the General Assembly decided to set up a home page containing all essential ASSIFONTE information. This page can be accessed at www.assifonte.org

Closing Remarks



The present annual report offers an overview of the various issues ASSIFONTE is involved in. However, good association work is only possible if there is close communication with the members. If you found the results of ASSIFONTE's work satisfactory in the past year, this is also the result of good co-operation with the representatives in the member delegations.

We would like to thank all those who have supported us in word and deed. We would also like to thank the members of the Board, led by Mr Cougoulic, who set out the practical and political orientations of ASSIFONTE.

In the past year, we were again able and pleased to meet officials of national and international authorities and organisations who were ready to listen and talk to us. We would like to thank them for the excellent co-operation. An open exchange of views has always allowed to develop solutions acceptable to both sides.

To promote understanding for our own situation but also consider our partners' views is the basis of the successful work of our association. We will continue to uphold this principle in the future.

A handwritten signature in black ink, appearing to read 'E. Hetzner'. The signature is written in a cursive, flowing style.

Eberhard Hetzner
(Secretary General)

COMITE DIRECTEUR

Alain Cougolic (F)	President
Gerard A.H. Kasbergen (NL)	Vice-President
Hans Bender (DK)	Treasurer
Simon Kane (UK)	
Gerhard Jerg (D)	
Eberhard Hetzner	General Secretary

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BELGIEN
BELGIQUE
BELGIUM

KRAFT FOODS NAMUR S.A
Nouvelle Route de Suarlée 6
B-5020 Temploux

KRAFT FOODS R & D INC.
Gerd Harzer
Unterbiberger Straße 15
81737 München
Tel: +49 89 627386113
Fax: +49 89 627386554
e-mail: gharzer@krafteurope.com

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DENMARK

DANISH DAIRY BOARD
Frederiks Allé 22
DK-8000 Aarhus C
Tel: +45 8731 2000
Fax: +45 8731 2001
e-mail: ddb@mejeri.dk
<http://www.mejeri.dk>

DANISH DAIRY BOARD
Hans Bender
47-51, Rue de Luxembourg, bte.2
B-1050 Bruxelles
Tel: +32 2 2302705
Fax: +32 2 2300143
e-mail: ddb@agridan.be

DEUTSCHLAND
ALLEMAGNE
GERMANY

MILCHINDUSTRIE-VERBAND
Eberhard Hetzner
Godesberger Allee 157
D-53175 Bonn
Tel: +49 228 95969-21
Fax: +49 228 371435
e-mail: hetzner@milchindustrie.de
<http://www.milchindustrie.de>

FINNLAND

Finland

FINNISH DAIRY ASSOCIATION

Finnish Food and Drink Industries
Seppo Heiskanen
P.O.Box 115, Pasilankatu 2
FIN-00241 Helsinki
Tel: +358 9 1488 71
Fax: +358 9 1488 7201
e-mail: seppo.heiskanen@etl.fi

FRANKREICH

FRANCE

SYNDIFONTE

Michel Roche
42, rue de Châteaudun
F-75314 Paris Cedex 09
Tel: +33 1 49707293
Fax: +33 1 42806399
e-mail: syndifonte@grandsfromages.com
<http://www.maison-du-lait.com>

IRLAND

IRLANDE

IRELAND

IRISH DAIRY INDUSTRIES ASSOCIATION

Ciaran Fitzgerald
Confederation House
84-86 Lower Baggot Street
Dublin 2 – Ireland
Tel: +353 1 6601011
Fax: +353 1 6601717
e-mail: marie.larby@ibec.ie
<http://www.ibec.ie>

ITALIEN

ITALIE

ITALY

ASSOCIAZIONE ITALIANA LATTIERO

Casearia – ASSOLATTE –
Corso di Porta Romana 2
I - 20122 Milano
Tel: +39 02 72021817
Fax: +39 02 72021838
<http://asslatmi@pelagus.it>

ASSOLATTE

Rosanna Pecere
Place de la Liberté 12
B-1000 Bruxelles
Tel: +32 2 2231105
Fax: +32 2 2194021
e-mail: assolatte.bxl@skynet.be

NIEDERLANDE

PAYS BAS

NETHERLANDS

NEDSMELT - Nederlandse Vereniging

van Kaassmelters
Marie-Louise Bögemann
P.O.Box 165
NL-2700 AD Zoetermeer
Tel: +31 79 3430303
Fax: +31 79 3430326
e-mail: bogemann@nzo.nl

ÖSTERREICH
AUTRICHE
AUSTRIA

Österreichische Schmelzkäseindustrie
Wolfgang Alge
Postfach 22
A-6911 Lochau
Tel: +43 5574 4973-115
Fax: +43 5574 4973-150
E-Mail: wolfgang.alge@rupp.at

Verband der Schmelzkäseindustrie
Zaunergasse 1 –3
A-1030 Wien
Tel: +43 1 712212127
Fax: +43 1 7121208

SCHWEDEN
SUEDE
SWEDEN

SVENSK MJÖLK - SWEDISH DAIRY ASSOCIATION
Eskil Arvidsson
Torsgatan 14
SE-105 46 Stockholm
Tel: +46 8 771191900
Fax: +46 8 7905830
e-mail: eskil.arvidsson@svenskmjolk.se
<http://www.svenskmjolk.se>

SPANIEN
ESPAGNE
SPAIN

Asociación Nacional de Fabricantes des Quesos
Ayala, 10 - 1º izda
E-28001 Madrid
Tel: +34 91 5762100
Fax: +34 91 5762117
e-mail: info@fenil.org
<http://www.fenil.org>

VEREINIGTES KÖNIGREICH
ROYAUME UNI
UNITED KINGDOM

Association of Cheese Processors
Peter Dawson
19 Cornwall Terrace
GB-London Nw1 4QP
Tel: +44 20 74 86 72 44
Fax: +44 20 74 87 47 34
e-mail: PDawson@dia-ltd.org.uk

ASSIFONTE

Important customer for dairy industry:
raw materials are milk products -
cheese, butter, milk powder etc.



Production: 500 - 550,000 tonnes/year



20 - 25 % is exports to third countries



Pioneering role of processed cheese to initiate
and develop cheese consumption in third countries

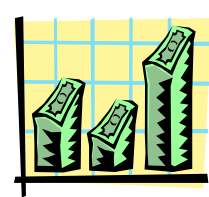
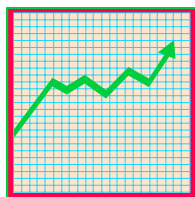


Close co-operation with EDA

- STATISTISCHER ANHANG -

- APPENDICE STATISTIQUE -

- STATISTICAL APPENDIX -



Production of Processed Cheese in t

Countries	1997	1998	1999	2000	2001	2002	2001:02 in %
Austria	13.531	14.396	17.894	18.017	20.900	23.990	14,8
Belgium	54.962	52.902	51.800	55.407	45.500	42.100 *	-7,5
Denmark	17.017	18.237	19.000	20.060	21.000	21.000 *	0,0
Finland	18.675	16.122	12.606	15.579	18.597	19.613	5,5
France	129.055	132.378	135.597	138.655	135.299	132.276	-2,2
Germany	148.502	156.135	160.552	170.676	175.369	177.484	1,2
Ireland	11.000	10.000	11.000	11.000	11.000	11.000 *	0,0
Italy	20.000	20.000	20.100	20.200	20.300	20.000 *	-1,5
Netherlands	30.679	26.679	16.359	16.820	17.800	17.000	-4,5
Spain	38.300	37.500	38.000	37.000	36.100	36.000	-0,3
Sweden	6.344	6.620	6.300	7.565	6.000	7.314	21,9
United Kingdom	28.045	30.853	30.853	34.349	33.477	36.377	8,7
Total	516.110	521.822	520.061	545.328	541.342	544.154	0,5

Per-capita consumption of Processed Cheese in kg

Countries	1997	1998	1999	2000	2001	2002	
Austria	1,1	1,1	1,1	1,1	1,01	1,02	
Belgium	1,1	1,2	1,2	1,3	1,25	1,20	*
Denmark	1,3	1,3	1,3	1,3	1,50	1,40	*
Finland	1,4	1,5	1,6	1,7	1,60	1,66	
France	1,2	1,2	1,2	1,3	1,38	1,30	
Germany	1,3	1,4	1,4	1,5	1,50	1,50	
Ireland	2,4	2,3	2,3	2,3	2,30	2,30	*
Italy	1,2	1,2	1,2	1,2	1,25	1,20	*
Netherlands	0,8	0,6	0,6	0,9	1,00	1,00	
Spain	1,0	1,0	1,0	1,0	1,16	1,18	
Sweden	0,7	1,0	1,1	1,0	1,13	1,30	
United Kingdom	0,6	0,5	0,5	0,5	0,60	0,60	*

*) estimated

Quelle/Source: ASSIFONTE Delegations and ZMP