MODULE: EUROPEAN UNION AGRI-FOOD TRADE POLICIES AND IMPORT REGULATIONS

Asha Gautam

Vice President - Food & Agriculture

TUV UK Limited

TÜV NORD GROUP
Expertise for your Success

AGENDA

1. TUV NORD Mission and Vision

2. Introduction – Food Safety Standards

3. Global Presence

4. Brand Reputation Compliance Global Standards and Operations

5. Accreditations

6. Service Portfolio

7. Certification process

   a. Audit Options

   b. Audit type protocols

   c. Scope and Regulation

   d. BRCGS Food product categories and IFS Food product scopes

   e. Certification cycle

   f. Audit duration

   g. Certificate template

   h. Post audit protocol

8. Market and the economic impact for manufacturing sites operating to certifications

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MISSION

Delivering trusted products

VISION

Providing trusted standards and services to cooperate within the supply chain to improve product integrity.

FOOD SAFETY STANDARDS

Developed over the last 20 years to provide a system of assurance that food from any source is safe

Framework for assessing the safety and quality of food production and distribution

BRCGS in the UK, IFS in Europe, and SQF in the US

Global Food Safety Initiative (GFSI) provides benchmarking of the operating criteria for private standards

The International Standards Organisation (ISO) has also published a food safety standard (ISO 22000)

FSSC 22000 – Under GFSI

Certification gain consumer confidence and ensure food safety across various stages in the supply chain

Food manufacturers and suppliers are actively seeking ISO 22000, BRCGS, SQF, IFS, and 'free-from' certifications

TÜV NORD GROUP

GLOBAL PRESENCE

TÜV NORD GROUP

Present in over **70** countries	Turnover of **EUR 1,2 billion**	Since **1869** successful @ TIC-market
TÜV®	**15,000** Employees approx.	**5** internationally operating Business Units

OBS FOOD / AGRICULTURE

40+ international subsidiaries	Turnover of **EUR 44 million**	**2** new market entries per year
Over **80** nat./int. Accreditation	**900** Auditors worldwide	**60,000** certified systems

BRCGS

Protecting your brand with supply chain certification and digital assurance solutions, recognised by the Global Food Safety Initiative (GFSI) and the Sustainable Supply Chain Initiative (SSCI).

Programmes covering Food Safety, Storage and Distribution, Packaging, Consumer Products, Agents and Brokers, Ethical, Free-from, and Retail.

Enabling brand owners to confirm the safety, quality and authenticity of their goods and services. Constantly innovating to create a quality eco-system, embracing digital tools and evolving key value drivers across health, human welfare and ethical performance.

30,000 Certificated sites.

185,000 Driving industry improvement with 185,000 corrected non-compliances per year.

130+ Operating in over 130 countries.

$800bn Retail products placed on the market assured by BRCGS certification.

Recognized by **70%** of top 10 global retailers, 60% of the top 10 quick service restaurants, and 50% of the top 25 manufacturers.

IFS International Featured Standards

- standards in up to 20 languages
- 6 standards and 4 programs
- 1250 auditors in 100 countries
- 5 national working groups with 117 members
- 40 employees speaking over 10 languages
- 8 offices world-wide
- 120 certification bodies & assessment service providers
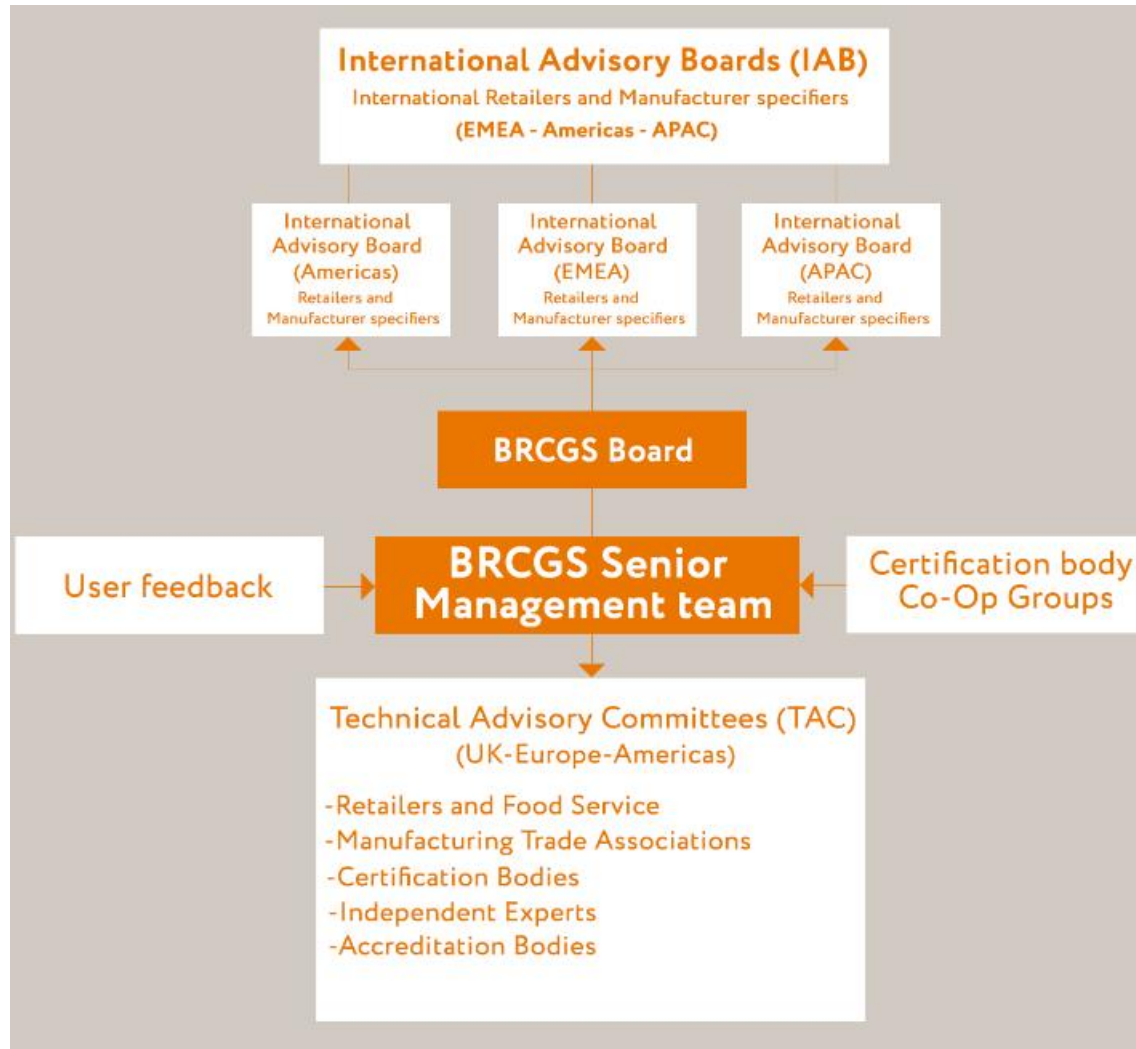- 2000+ retailer accounts

Today, many retailers and brand owners worldwide will only do business with suppliers who have gained certification in the appropriate GFSI Schemes such as BRCGS, IFS, FSSC
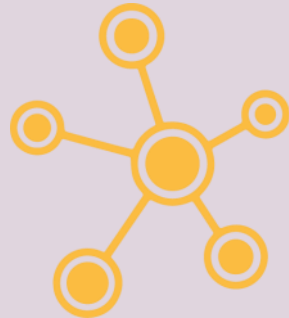
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BRAND REPUTATION COMPLIANCE GLOBAL STANDARDS

TÜV NORD

1996 – BRC Global Standards was set up to reduce audit duplication by UK retailers

1998 – Food safety first published

2000 – Food Safety first standard to be recognised by GFSI

2001 – Packaging and Packaging Materials first published

2003 – Consumer Products first published

2004 – BRC Bookshop launched

2004 – BRC Directory launched

2006 – Storage and Distribution first published

2014 – Agents and Brokers first published

2014 – BRC Participate launched

2015 – Launched new e-learning platform

2016 – BRC Global Standards Professional launched; Offices opened in USA and India; Acquired by LGC Group; Retail first published

2017 – Food Safety Culture Excellence launched

2018 – Issue 8 START! Global Markets Food Safety Published

2018 – Acquisition of the Allergen Control Group Inc. (AGC); New Service package launched

2019 – BRCGS Branding Launched February 2019

2019 – Issue 6 Packaging Materials Published

2019 – Issue 3 Gluten-Free published

2019 – Issue 1 Ethical Trade and Responsible Sourcing Published

2020 – Issue 1 Plant-based Standard Published; Tell BRCGS Confidential Reporting Launched

www.brcgs.com

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BRAND REPUTATION COMPLIANCE GLOBAL STANDARDS

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ACCREDITATION BODIES AND NETWROKS

International Networks of Accreditation Bodies
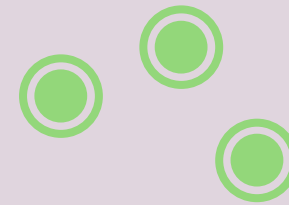
National Accreditation Bodies

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SERVICE PORTFOLIO: FOOD, FEED, NON AND NEAR FOOD STANDARDS

Agriculture +

Fishing +

Food Production +

Household & Personal Care +

Trade +

Logistics +

Feed Industry +

Packaging +

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IFS SERVICES

IFS Food

Standard for assessing food product processors/manufacturers.

IFS Food shall be used when a product is processed or where there is a risk of product contamination coming from primary packaging.

IFS HPC

Standard for assessing companies that manufacture household and personal care products, or companies that pack loose household and personal care products. IFS HPC can only be used when a product is "processed" or when there is a hazard for product contamination during the primary packing.

IFS Logistics

Standard for companies whose activities are logistics services for food and non-food products, such as transport, storage, loading/unloading, etc. It applies to all types of transport: delivery by road, rail, ship, plane, etc. and to all types of products: frozen, refrigerated, ambient stable, etc.

The product IFS Standards under the specific subchapter about transport and/or storage already cover a production company's own logistics activities. Therefore, it is not necessary to perform a combined Assessment for IFS Food, IFS HPC or IFS PACsecure in combination with IFS Logistics.

BRCGS SERVICES

The BRCGS for Food Safety set out for the manufacture of processed foods and the preparation of primary products supplied as retailer- branded, branded food products and food or ingredients for use by food service companies, catering companies and food manufacturers.

The BRCGS for Agents and Brokers is a GFSI benchmarked standard applicable to companies that buy and sell products or facilitate the trade of products but do not manufacture, process, pack or store the traded products in their own facilities or their own sites although such activities may be offered to their customers via subcontracted service providers.

The BRCGS for Consumer products is applicable to the manufacture and assembly of consumer products. Based on market needs, it comprises of two separate standards: Personal care and household; and General Merchandise. Both standards set out the requirements for the manufacturer of relevant non- food consumer products, including the manufacture of raw materials and components, as well as finished products. Both of these standards have two levels of certification : Foundation and Higher

The BRCGS for Packaging and Packaging Materials is a GFSI benchmarked standard applicable to companies that manufacture packaging materials used for food and consumer products. This standard applies where ever processes are undertaken with packaging materials- even simple process such as cut and crease.

The BRCGS for Storage and Distribution is a GFSI benchmarked standard that sets out the requirements for the storage, distribution, wholesaling and contracted services of packaged food products, packaging materials and consumer goods. This standard is not applicable to storage facilities under the direct control of production facility management, which are covered by the relevant manufacturing standard

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CERTIFICATION PROCESS

Learn
- Visit www.brcgs.com
- Download a copy of the Standard
- Review any appropriate guidelines

Audit preparation
- Select an audit option (announced, unannounced or blended), with or without additional modules
- Self-assess compliance with the Standard
- Select a certification body
- Define scope of the audit

Audit planning
- Ensure information and appropriate personnel are available for the audit, even in the event of an unannounced audit
- Provide information to certification body for audit preparation
- Define audit date (or parameters if unannounced) and agree audit duration based on audit duration calculator

Audit
The audit will consist of several different audit techniques, including:
- Opening meeting
- Production facility inspection
- Document review
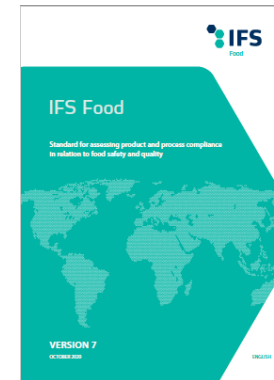- Vertical audit (including traceability challenge and mass balance)
- Final review of findings
- Closing meeting

Non-conformities and corrective action
- Carry out corrective action, root cause analysis and develop a preventive action plan for any non-conformities identified. Evidence must be submitted within 28 days of the end of the audit
- Certification body reviews evidence in 14 days
- If corrective action, root cause analysis and preventive action plan are deemed satisfactory, a certificate, audit report and corresponding grade will be issued within 42 days of the audit

Post-audit
- Ongoing maintenance of the Standard and continual improvement
- Get login details for the BRCGS Directory and share audit report
- Use of BRCGS logo
- Ongoing communication with certification body
- Schedule re-audit date before the next audit is due

IFS Food

Company decides to go for an IFS certification

1 Reading of the relevant IFS Standard/Self-assessment to determine current status

2 Company selects an IFS approved certification body

Together with the company the certification body shall

3 Determine the scope → **4** Determine the duration → **5** Define the Assessment date (or period)

6 Realisation of the IFS Assessment

7 Schedule of the Assessment day(s)

Opening meeting → On-site evaluation and documentation and record review and inspection → Closing meeting

Deadlines for issuing the IFS Certificate and certification decision

Draw up the provisional report/action plan of deviations and non-conformities identified during the Assessment (auditor/certification body) (maximum two (2) weeks)	Completion of the action plan and determination of corrections and corrective actions (site) (maximum four (4) weeks)	Review of the action plan and the IFS Assessment report. All corrections shall be implemented. (auditor/certification body)	Certification decision (certification body) (six (6) to eight (8) weeks maximum)

If compliant, IFS Certificate

If not compliant (see details in ANNEXES 5 and 6)

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1. Inquiry & offer preparation
2. Commissioning of TÜV NORD
3. Audit stage 1: determination of certification maturity
4. Audit stage 2: certification audit
5. Certification decision by TÜV NORD
6. Certificate is issued

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AUDIT OPTIONS

Announced audit programme (with mandatory unannounced audit every 3 years)

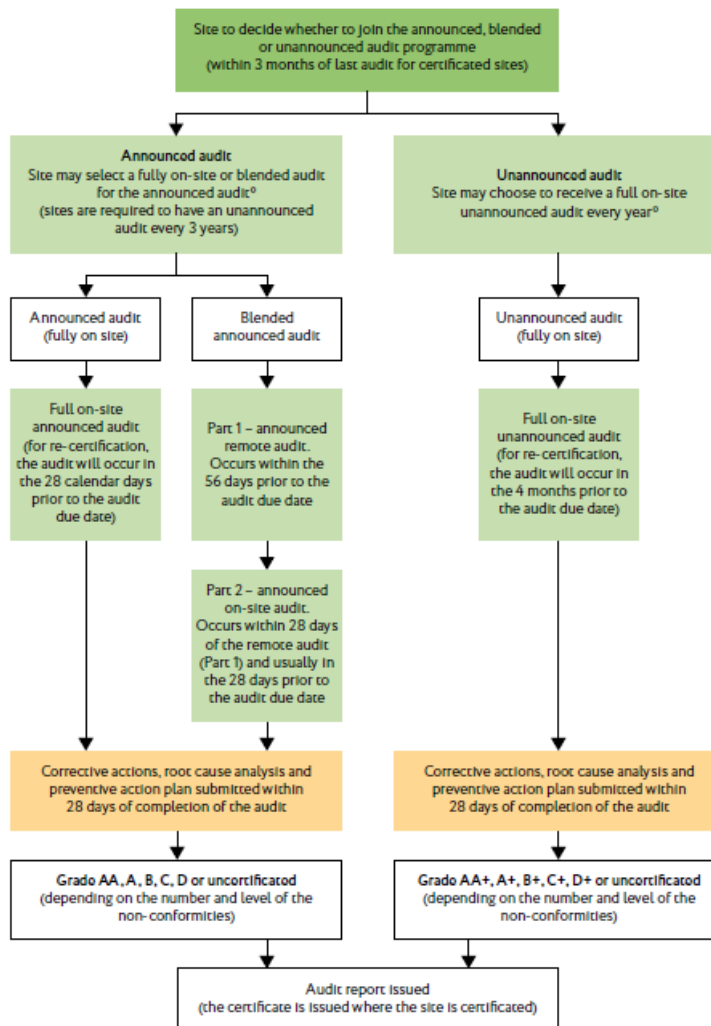Blended announced audit programme (with mandatory unannounced audit every 3 years)

Unannounced audit programme

Announced audit programme (with mandatory unannounced audit every 3 years)

Unannounced audit programme
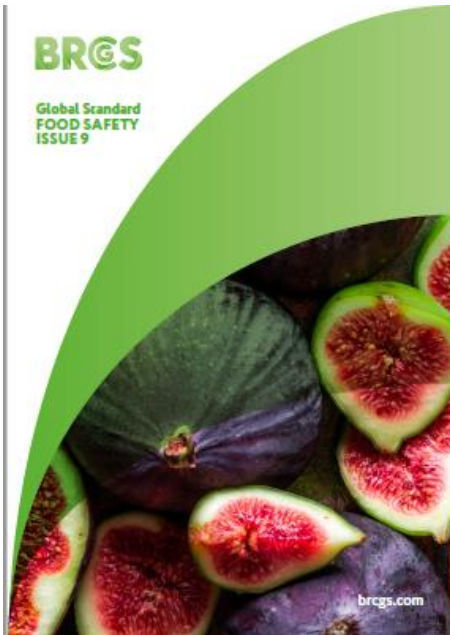
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AUDIT TYPE PROTOCOL

Figure 2 Audit options flow diagram

SCOPE AND REGULATION

Scope of the standard

- processed foods, both own brand and customer-branded
- raw materials or ingredients for use by food service companies, catering companies and/or food manufacturers
- primary products, such as fruit and vegetables
- pet foods for domestic animals and animal feed
- products from animal primary conversion.

Food Safety Legislation

- undertake a HACCP or risk-based approach to the management of food safety
- provide a processing environment which ensures that the risks of product contamination are minimised
- ensure the presence of a detailed specification to facilitate the production of food products that are lawful and consistent with compositional and safety standards and good manufacturing practice
- satisfy themselves that their suppliers are competent to produce the specified product, comply with legal requirements, and operate appropriate systems of process control
- establish and maintain a risk-assessed programme for product examination, testing and/or analysis
- monitor and act upon customer complaints.

Food Safety Management System

- senior management commitment
- the development of a food safety plan – a HACCP-based hazard and risk assessment system (which provides a step-by-step approach to managing food safety risks)
- a product safety and quality management system
- the establishment of prerequisite programmes.

BRCGS FOOD PRODUCT CATEGORIES

Field of audit	Category no.	Category description	Product examples	Storage conditions	Examples of knowledge of technology required by auditor
Raw products of animal or vegetable origin that require cooking prior to consumption	1	Raw red meat	Beef/veal, pork, lamb, venison, offal, other meat	Chilled, frozen	Slaughter and primary cutting Vacuum packing Modified atmosphere packaging
	2	Raw poultry	Chicken, turkey, duck, goose, quail, farmed and wild game Shell egg	Chilled, frozen	Slaughter and primary cutting Vacuum packing Modified atmosphere packaging
	3	Raw prepared products (meat and vegetarian)	Bacon (including smoked bacon), comminuted meat and fish products (e.g. sausages, fish fingers), ready-to-cook meals, ready prepared meat products, pizzas, plant-based prepared meals, steamer meals	Chilled, frozen	Retail butchery, processing and packing Curing, marinading, vacuum packing, modified atmosphere packaging
	4	Raw fish products	Wet fish, molluscs, crustaceans	Chilled, frozen	Stunning, harvesting Vacuum packing, modified atmosphere packaging
Fruit, vegetables and nuts	5	Fruit, vegetables and nuts	Fruit, vegetables, salads, herbs, nuts (unroasted)	Fresh	Washing, grading
	6	Prepared fruit, vegetables and nuts	Prepared/semi-processed fruit, vegetables and salads including prepared ready-to-eat salads, coleslaws, frozen vegetables	Chilled, frozen	Blanching, freezing High-care principles

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BRCGS FOOD PRODUCT CATEGORIES

Field of audit	Category no.	Category description	Product examples	Storage conditions	Examples of knowledge of technology required by auditor
Processed foods and liquids with pasteurisation or UHT as heat treatment or similar technology	7	Dairy, liquid egg	Liquid egg, liquid milk/drinks, cream, liquid tea and coffee creamers, yogurts, fermented milk-based products, fromage frais/crème fraîche, butter Ice cream Cheeses – hard, soft, mould ripened, unpasteurised, processed, cheese food Long-life milks, non-dairy products (e.g. soya milk), ambient yogurts, custards etc. Fruit juices (includes freshly squeezed and pasteurised, smoothies) Dried whey powder, dried egg, dried milk/milk formulation	Chilled, frozen, ambient	Dairy technology – pasteurisation, separation, fermentation High-risk principles
Processed foods, ready-to-eat or heat	8	Cooked meat/fish products	Cooked meats (e.g. ham, meat pâté, hot eating pies, cold eating pies), molluscs (ready to eat), crustaceans (ready to eat), fish pâté Hot smoked fish, poached salmon	Chilled, frozen	High/low-risk principles Vacuum packs Heat treatment
	9	Raw cured and/or fermented meat and fish	Parma ham, ready-to-eat cold smoked fish, cured fish (e.g. gravlax), air-dried meats/salami, fermented meats, dried fish	Chilled	Curing, fermentation, smoking High/low-risk principles
	10	Ready meals and sandwiches, ready-to-eat desserts	Ready meals, sandwiches, soups, sauces, pasta, quiche, flans, meal accompaniments, cream cakes, trifles, assembled high-risk sweet desserts	Chilled, frozen	High/low-risk principles
Ambient stable products with pasteurisation or sterilisation as heat treatment	11	Low/high acid in cans/glass/plastic containers	Canned products (e.g. beans, soups, meals, fruit, tuna). Products packed in glass (e.g. sauces, jams, pickled vegetables) Products packed in plastic pouches (e.g. baby food) Pet food	Ambient	Canning Thermal processing UHT

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BRCGS FOOD PRODUCT CATEGORIES

Field of audit	Category no.	Category description	Product examples	Storage conditions	Examples of knowledge of technology required by auditor
Ambient stable products not involving sterilisation as heat treatment	12	Beverages	Soft drinks including flavoured water, isotonics, concentrates, squashes, cordials, minerals, table waters, ice, herbal drinks, food drinks	Ambient	Water treatment Heat treatment
	13	Alcoholic drinks and fermented/brewed products	Beer, wine, spirits Vinegars Alcopops	Ambient	Distilling, fermentation, fortification
	14	Bakery	Bread, pastry, biscuits, cakes, tarts, breadcrumbs	Ambient, frozen	Baking
	15	Dried foods and ingredients	Soups, sauces, gravies, spices, stocks, herbs, seasonings, stuffings, pulses, legumes, rice, noodles, nut preparations, fruit preparations, dried pet food, vitamins, salt, additives, gelatine, glacé fruit, home baking, syrups, sugar, tea, instant coffee and non-dairy coffee creamers	Ambient	Drying, heat treatment
	16	Confectionery	Sugar confectionery, chocolate, gums and jellies, other sweets	Ambient	Heat treatment
	17	Cereals and snacks	Oats, muesli, breakfast cereals, roasted nuts, crisps, poppadoms	Ambient	Extrusion, heat treatment
	18	Oils and fats	Cooking oils, margarine, shortening, spreads, suet, ghee Salad dressings, mayonnaise, vinaigrettes	Ambient	Refining, hydrogenation

IFS FOOD PRODUCT SCOPES

IFS Food product scopes	
1.	Red and white meat, poultry and meat products
2.	Fish and fish products
3.	Egg and egg products
4.	Dairy products
5.	Fruit and vegetables
6.	Grain products, cereals, industrial bakery and pastry, confectionary, snacks
7.	Combined products
8.	Beverages
9.	Oils and fats
10.	Dry goods, other ingredients and supplements
11.	Pet food

IFS Food

IFS Food

Standard for assessing product and process compliance in relation to food safety and quality

VERSION 7
OCTOBER 2020

ENGLISH

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IFS FOOD PRODUCT TECHNOLOGYSCOPES

IFS technology scope	IFS processing step – including processing/treating/manipulation/storing		Technology oriented classification which also takes product risks into consideration
A	P1	Sterilisation (e.g. cans)	**Sterilisation (in final packaging) with the purpose to destroy pathogens** Sterilised (e.g. autoclaved) products in final packaging
B	P2	Thermal pasteurisation, UHT/aseptic filling, hot filling Other pasteurisation techniques e.g. high pressure pasteurisation, microwave	**Pasteurisation with the purpose to reduce food safety hazards (and UHT process)**
C	P3	Irradiation of food	**Processed products: treatment with purpose to modify products and/or extend the shelf life and/or reduce food safety hazards by preservation techniques and other processing techniques** Note—exception: Irradiation is attributed to this category although aimed for the destruction of microorganisms
	P4	Preserving: salting, marinating, sugaring, acidifying/pickling, curing, smoking, etc. Fermentation, acidification	
	P5	Evaporation/dehydration, vacuum filtration, freeze drying, microfiltration (less than 10 μ mesh size)	
D	P6	Freezing (at least −18 °C/0 °F) including storage quick freezing, cooling, chilling processes and respective cool storing	**Systems, treatments to maintain product integrity and/or safety** Treatment with purpose to maintain the quality and/or integrity of the products including treatments to remove contamination and/or prevent contamination
	P7	Antimicrobial dipping/spraying, fumigation	

IFS technology scope	IFS processing step – including processing/treating/manipulation/storing		Technology oriented classification which also takes product risks into consideration
E	P8	Packing MAP, packing under vacuum	**Systems, treatments to prevent product contamination** P9 is applicable in any case when there are at least 2 procedures/methods implemented in a company to guarantee product safety/product hygiene e.g.: • disinfection of equipment + chilled room temperature (e.g. dissection of meat) • disinfection + special hygiene equipment for employees (e.g. hygiene sluice) • room with over-pressure + special hygiene equipment for employees (e.g. hygiene sluice), • air filtration + room with over-pressure
	P9	Processes to prevent product contamination esp. microbiological contamination, by means of high hygiene control and specific infrastructure during handling, treatment and/or processing e.g. clean room technology, "white room", controlled working room temperature for food safety purpose, disinfection after cleaning, positive air pressure systems (e.g. filtration below 10 μ)	
	P10	Specific separation techniques: e.g. filtration like reverse osmosis, use of active charcoal	
F	P11	Cooking, baking, bottling, brewing, fermentation (e.g. wine), drying, frying, roasting, extrusion, churning	**Any other manipulation, treatment, processing not being listed in A, B, C, D, E and not controlled as a CCP or as a control measure.**
	P12	Coating, breading, battering, cutting, slicing, dicing, dismembering, mixing/blending, stuffing, slaughtering, sorting, manipulation, packing, storing under controlled conditions (atmosphere) except temperature, labelling	
	P13	Distillation, purification, steaming, damping, hydrogenating, milling	

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Standard for assessing product and process compliance in relation to food safety and quality
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Announced/unannounced	Audit date	Next audit due date
Initial audit at site (announced)	1–2 June 2020	1 June 2021
Re-audit (announced)	20–21 May 2021 (audit within 28 calendar days prior to the audit due date)	1 June 2022
Re-audit (1 in 3 unannounced)	1–2 March 2022 (audit within 4 months prior to the audit due date)	1 June 2023
Re-audit (announced)	20–21 May 2023 (audit within 28 calendar days prior to the audit due date)	1 June 2024
Re-audit (announced)	20–21 May 2024 (audit within 28 calendar days prior to the audit due date)	1 June 2025
Re-audit (1 in 3 unannounced)	10–11 March 2025 (audit within 4 months prior to the audit due date)	1 June 2026

- Initial Assessment date: 1st of October, 2021
- Date of issue of certificate: 26th of November, 2021
- Certificate valid until: 25th of November, 2022
- Recertification Assessment date: 26th of September, 2022
- Certificate valid until: 25th of November, 2023 (independently from the recertification Assessment date)

- Time window to schedule the recertification for an **announced** Assessment: [6th of August–15th of October].
- Time window to schedule the recertification for an **unannounced** Assessment: [11th of June–15th of October].

| Oct. 2021 | Nov. D J F M A M J J A | Sept. 2022 | O | Nov. D J F M A M J J A S | Oct. 2023 | Nov. D J F M A M J J A S |

< 12 months   > 12 months   = 12 months

IA: 01.10.2021   RA: 26.09.2022   RA: 02.10.2023

C: 25.11.2022   C: 25.11.2023   C: 25.11.2024
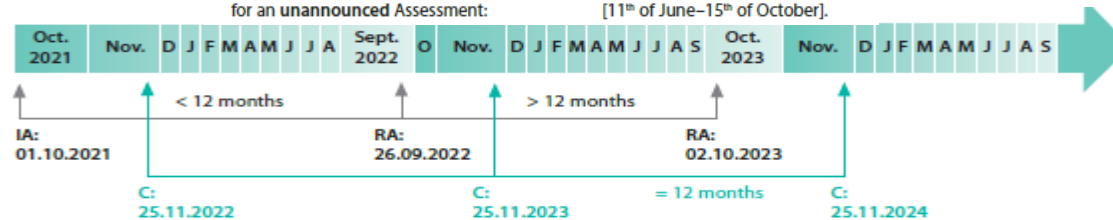
IA: Initial Assessment
RA: Recertification Assessment
C: Issue a certificate valid until

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AUDIT DURATION

Typical duration is 2-3 days, never is excess of 10 hours per day

The calculation for the audit duration is based on:

- the number of employees – as full-time equivalent employees per main shift, including seasonal workers
- the size of the manufacturing facility, including on-site storage facilities
- the number of HACCP plans (or food safety plans) included within the scope. For the purpose of the calculator, a plan corresponds to a family of products with similar hazards and similar production technology.

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Factors influence audit duration by not more than 30% of total calculated time

- whether it is an initial certification audit
- shortfalls in the information provided prior to the audit, as specified in section 2.1.2
- the complexity of the manufacturing process
- the number of product lines
- the age of the site and the impact on material flow
- the labour intensity of the processes
- communication difficulties (e.g. language)
- the number of non-conformities recorded in the previous audit (requiring additional time to review the relevant systems and confirm implementation of effective preventive action)
- difficulties experienced during the audit requiring further investigation
- the quality of site preparation (e.g. documentation, HACCP, quality management systems).

Minimum IFS Food Assessment duration is two (2) days (16 hours). One Assessment day is equivalent to eight (8) hours (without lunch break) and shall never exceed ten (10) hours

- total number of employees (including part time workers, shift workers, temporary staff, administrative people, etc.), considering the total maximum number of employees over a year
- number of product scopes
- number of processing steps ("P" steps).

Calculator is available on BRCGS and IFS website
www.brcgs.com
www.ifs-certification.com

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CERTIFICATE TEMPLATE

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STANDARD POST AUDIT PROTOCOL

- Communication with certification bodies
- Position statements
- Extension to scope
- Certification withdrawal
- Appeals
- Surveillance of certificated companies
- BRCGS logos
- BRCGS Directory

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IFS MARKET DEVELOPMENT

IFS Standards	Jan. – Dec. 2019	Jan. – Dec. 2020	Jan. – Dec. 2021	Change in Total	Change in %
Food	18.606	18.314	19.466	1152	6.3%
Logistics	2.652	2.723	3.031	308	11.3%
Broker	1.804	1.866	2.205	339	18,2%
PACsecure	233	185	246	61	33%
HPC	407	410	469	59	14.4%
Wholesale/Cash&Carry	795	767	799	32	4.2%
Global Markets Program					
Global Markets Food	2238	1898	1875	-23	-1.2%
Global Markets Logistics	48	51	55	4	7.8%
Global Markets HPC	46	48	18	-30	-62.5%

In 2021, the total number of audits and assessments increased by 7%

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IFS CERTIFICATES IN EUROPE 2021

IFS International Featured Standards

IFS Food

IFS Logistics

IFS Broker

Netherlands
854
185
261

Germany
2458
935
699

Poland
982
206
63

Czech Rep.
384
66
10

France
1968
109
117

Slovakia
132
18
10

Spain
3166
321
215

Switzerland
164
40
34

Italy
3686
211
186

Austria
392
112
72

How to read:
Country
Food
Logistics
Broker

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DEVELOPMENT 2022

IFS International Featured Standard

IFS Standards	Jan. – Sep 2021	Jan. – Sep 2022	Total more	in %
Food	14,935	15,949	1,014	6,8
Logistics	2,235	2,486	251	11,2
Broker	1,651	1,941	290	17,5
PACsecure	163	204	41	25,1
HPC	311	346	35	11,2
Wholesale/Cash&Carry	559	621	62	11,1
Global Markets Program				
Global Markets Food	1,346	1,528	182	13,5
Global Markets Logistics	44	72	28	63,6

In 2022, the number of audits and assessments increased by 8,9 per cent to 23,147 compared to 2021 (21.244)

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DEVELOPMENT 2022

**IFS** International Featured Standards

- ☑ IFS is growing - even in times of the pandemic.
- ☑ IFS is the largest CPO in Europe.
- ☑ IFS has the support of retail & wholesale companies in continental Europe because we focus on private label protection.
- ☑ IFS continues to expand towards CEE & North Africa
- ☑ IFS has broad support from Latin American retailers - the IFS Global Markets program supports supplier development.
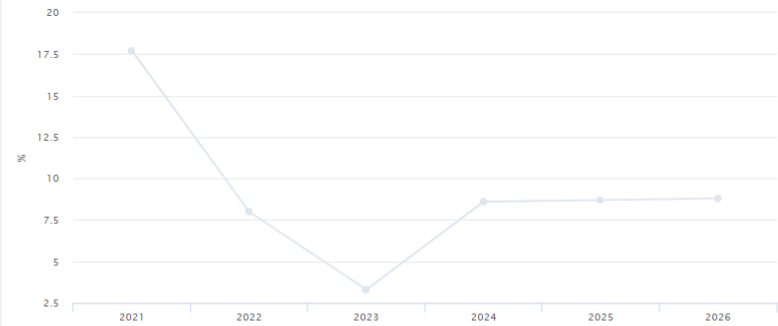
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MARKET- INDIA

Resources4Life / Food & Non-Alcoholic Drinks

Facts		CAGR 2015-2020 India	Abs 2021 India	y-o-y in %						CAGR 2020-2025 India
				2021 India	2022 India	2023 India	2024 India	2025 India	2026 India	
Food sales, USD		5.7%	548,9bn	17.7%	8.0%	3.3%	8.6%	8.7%	8.8%	9.2%
Non-alcoholic drinks sales, USD		5.2%	8,3bn	17.0%	7.2%	2.8%	8.1%	8.2%	8.4%	8.6%

Food sales, USD India (in m)
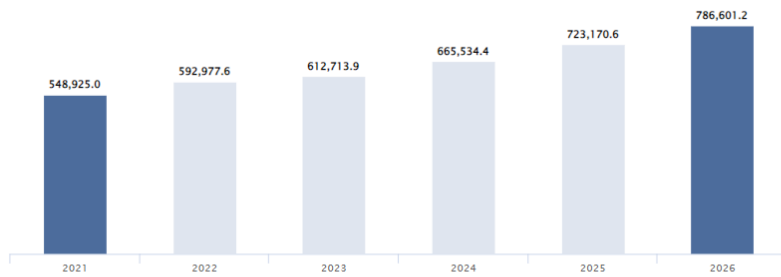
Food sales, USD India (growth y-o-y in %)

Non-alcoholic drinks sales, USD India (in m)

Non-alcoholic drinks sales, USD India (growth y-o-y in %)

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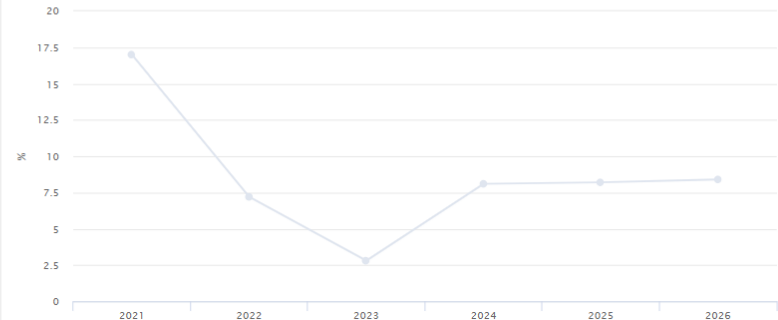
MARKET- INDIA V/S EUROPE

Resources4Life / Food & Non-Alcoholic Drinks

Facts		CAGR 2015-2020		Abs 2021	y-o-y in %												CAGR 2020-2025	
					2021		2022		2023		2024		2025		2026			
		India	Europe		India	Europe	India	Europe	India	Europe	India	Europe	India	Europe	India	Europe	India	Europe
Food sales, USD		5.7%	2.7%	548,9bn	17.7%	7.8%	8.0%	-2.2%	3.3%	-0.6%	8.6%	11.1%	8.7%	6.1%	8.8%	6.0%	9.2%	4.3%
Non-alcoholic drinks sales, USD		5.2%	3.3%	8,3bn	17.0%	8.0%	7.2%	-1.4%	2.8%	0.3%	8.1%	12.0%	8.2%	6.3%	8.4%	5.6%	8.6%	4.9%

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# ECONOMIC IMPACT FOR MANUFACTURING OPERATING TO CERTIFICATION

Certification objectives

- Safe food

- Meeting the needs of existing and potential customers

- Enhancing competitiveness – Domestic growth and Overseas growth

- competitiveness for large shares of FBOs, especially in export markets

- certification leads to fewer customer audits
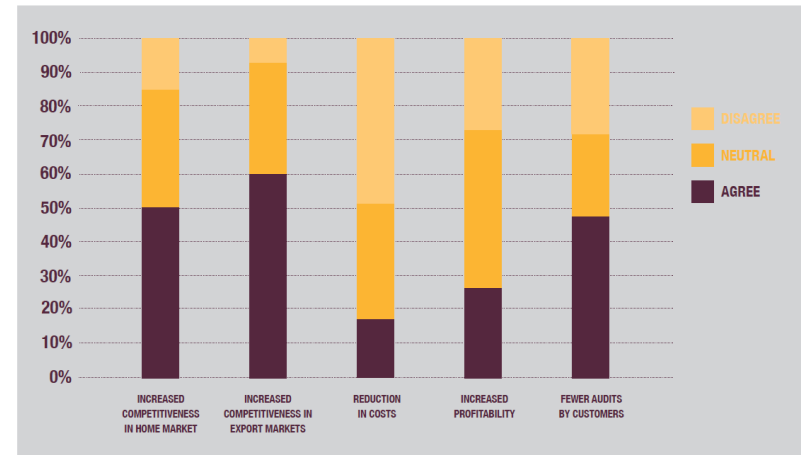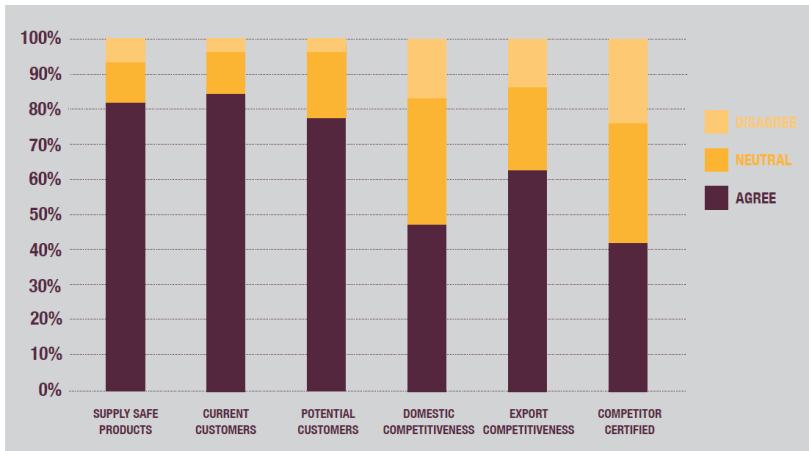
ECONOMIC IMPACT FOR MANUFACTURING OPERATING TO CERTIFICATION

- Determinant of broad-based innovation, operational efficiency and business expansion

- Modernisation - improving the stock of physical capital through new or upgraded plant and equipment

- Spur to investment and management changes- Efficiencies and greater productivity- Safe and high quality food

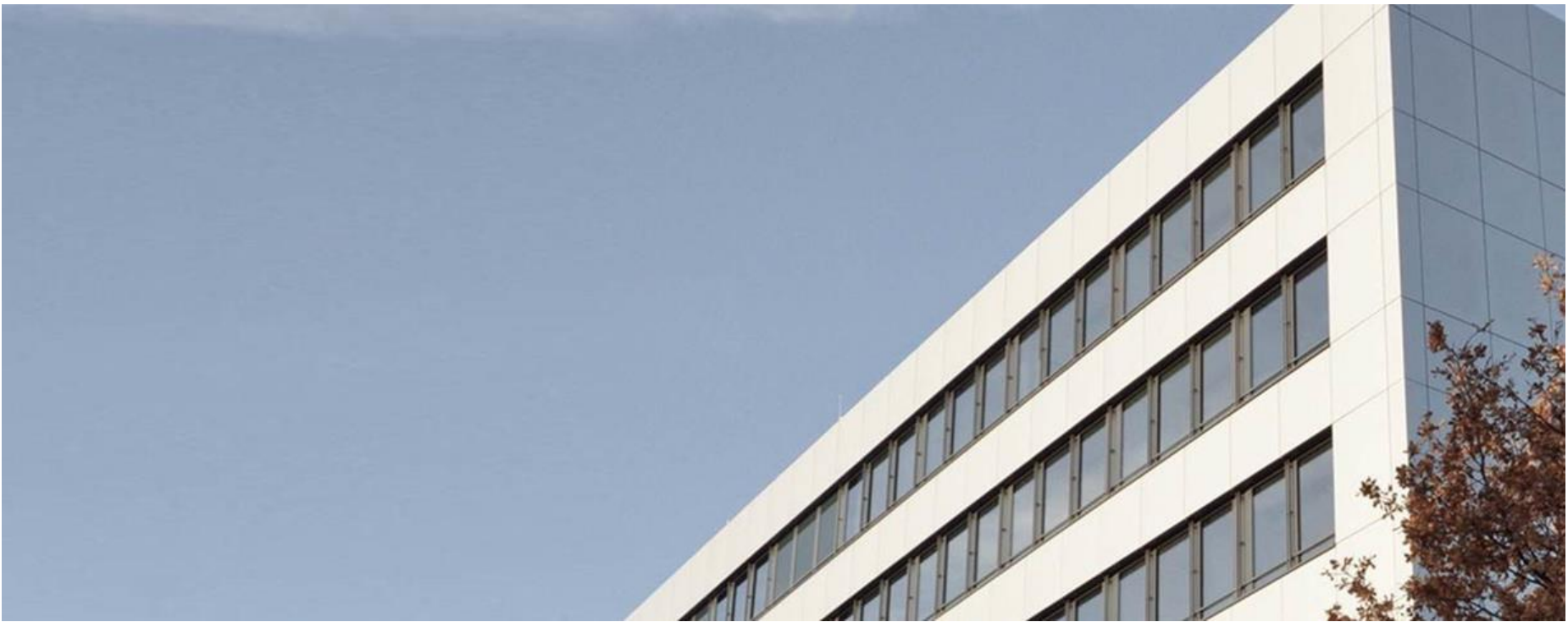- Operational improvements – Reduction in food recall

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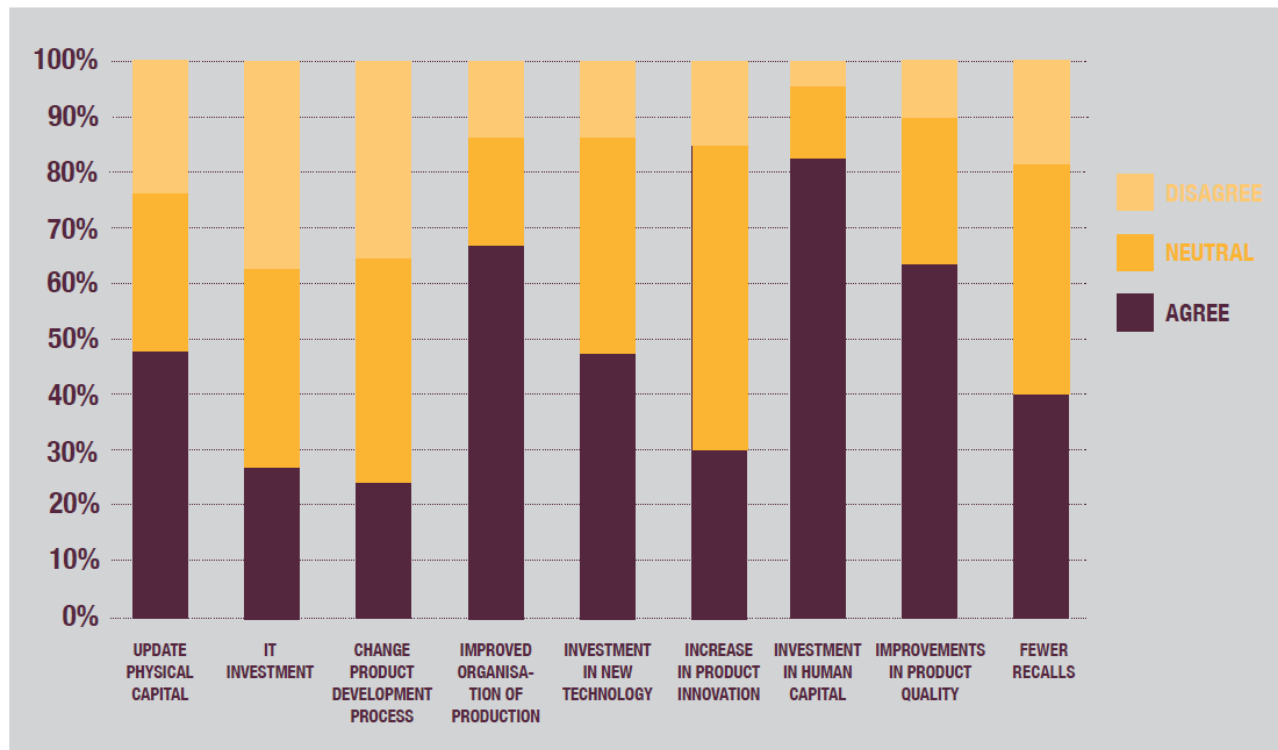
	Countries	Auditors	Certificates
EUROPE	18	97	14001
ASIA	13	567	13222
AMERICA	6	250	3904
AFRICA	1	6	475

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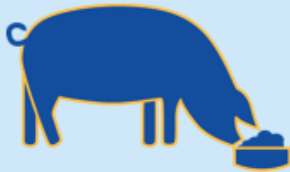
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WHAT IS YOUR NEXT
CERTIFICATION PROJECT?

THANK YOU.

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