

DRAFT - BUSINESS PLAN

CEN/TC 302

Milk and milk products – Methods of sampling and analysis

EXECUTIVE SUMMARY

Regarding the development of European standards for methods of analysis and sampling of milk and milk products.

Business Environment

- The EU is the biggest cow's milk producer worldwide representing about nearly a quarter of the total world cow's milk producer market;
- The EU dairy industry is an important sector in the European food industry;
- The EU dairy market is a continuum of changes, where dynamics in production as well as in consumer demand constantly put new challenges to the dairy production chain;
- The EU dairy industry operates in a global environment and is one of the leading exporters in the international dairy market, which is an important outlet for its variety of products;
- International trade is a substantial element in the EU dairy industry's business model. To facilitate this, standardization of methods of analysis and sampling is of key importance.
- Laboratories and other stakeholders need reliable European and/or worldwide adopted standards for methods of analysis and sampling for milk and milk products rather than only national related ones;
- Parties involved in the standardization work are:
 - ◆ Milk producers;
 - ◆ Dairy processors;
 - ◆ Purchasers/users of milk and milk products;
 - ◆ The industry related to different fields of application of milk or dairy-based ingredients, e.g. the food industry;
 - ◆ Laboratories, universities, research institutes, equipment and test kit manufacturers;
 - ◆ Governmental bodies.

Benefits

To promote interoperability in Europe and globally:

- Since the setting up of CEN/TC 302 in 1992, over 50 new or revised standards for methods of analysis and sampling for milk and milk products have been adopted;
- The European Commission can introduce commonly supported and reliable standards in their directives/regulations;
- Confidence of users in respect of the quality and the reliability of adopted standards;
- Availability of harmonized methods for analysis and sampling for stakeholders, transparency and reduction of trade barriers.

Priorities

- Addressing the need of stakeholders (dairy chain actors, laboratories, competent authorities) involved within the European community;
- Maintaining confidence among users, taking into account requirements for parties with special needs;
- Supporting the application of standards in practice;

- Recruitment of experts and maintaining other resources for the standardization work.

1 BUSINESS ENVIRONMENT OF CEN/TC 302

1.1 Description of the business environment

The following political, economical, technical, regulatory, societal and international dynamics describe the business environment of CEN/TC 302. They may, separately or combined, significantly influence the way the relevant standard development processes are conducted and the content of the resulting standards.

- The dairy industry represents one of the important sectors within the European food industry and covers activities related to the processing of milk for alimentary and feed use and the production of of milk derived products and by-products. The dairy industry is a high value adding business in the European food sector, which is especially true for its still growing segments such as yoghurts and fresh and soft cheeses. New “innovative” dairy products, such as desserts or spreadable cheeses, products with bio-active compounds, special infant formula and adult nutritionals are gradually introduced both in existing and in new markets.
- National and EU agricultural policies and international trade agreements significantly influence the dairy sector. Policy changes in the CAP since 2007 gave way to new challenges to the EU dairy sector with a reduction in price support and the abolishment of the milk quota system (2015). This resulted in a closer connection to the world market and its often volatile price patterns.
- Dairy demand in the EU is far above the global average. Overall EU demand for dairy products has been rather stable throughout recent years, reflecting a saturated market, though differences do exist between product categories: as such, dairy demand within the EU has indeed shown low dynamism although gradual shifts occur within product categories. There is a constant but slow growth in consumption of cheeses, fresh dairy products and dairy ingredients in Europe. Liquid milk consumption remains in a longterm downward trend, feeling pressure from soft drinks and non-dairy alternatives. However, while the domestic market stabilizes, global opportunities for exports have expanded in the past years, especially in South East Asia.
- Handling, trading and consumption of milk and milk products is a worldwide business. Standards therefore are preferably developed on an international level, i.e. through the International Organization for Standardization (ISO), rather than on a national or European level.
- Health and food safety are key aspects, in the trading, handling and consumption of milk and milk products. The prime human-interest aspect of food and food safety implies very active concern of governmental bodies to ensure a safe food supply, on the international level e.g. through the United Nations and its Codex Alimentarius. Standards play a growing role in the food sector and the increasing importance of health and safety aspects call for new standards and amendment of existing ones.
- Developments in the field of quality assurance and quality management also call for new standards and upgrading of existing ones, in particular with respect to traceability of test results.
- Stakeholders, in particular those interested in methods of sampling and analyses for milk and milk products, are predominantly the following:
 - ◆ Milk producers;
 - ◆ Dairy processors;
 - ◆ Purchasers/users of milk and milk products;
 - ◆ Industrial customers of the dairy industry, active in the different fields of application of milk or dairy-based ingredients, e.g. the food industry;
 - ◆ Laboratories, universities, research institutes, equipment and test kit manufacturers;
 - ◆ Governmental bodies.

1.2 Quantitative indicators of the business environment

The following quantitative indicators describe the business environment to provide adequate information on support actions of CEN/TC 302 on providing up-to-date European standards:

- The growth of the EU with 13 more member countries since 2004 is not only a challenge to most of the dairy industries of the new members but also created new market-growth opportunities for others, hence triggering more in- and export. The union reached its current size of 28 member countries with the accession of Croatia on 1 July 2013.
- The former-mentioned EU enlargement underpins the need for reliable EU standards for milk and milk products to facilitate the national, regional and world-wide trade of milk and milk products by providing:
 - ◆ Common sampling methods for milk and milk products;
 - ◆ Common reference and alternative test methods for evaluating the safety, quality, and composition of milk and milk products.

The above-mentioned need is already fulfilled greatly by joint ISO-IDF International Standards developed through the co-operation of the International Organization for Standardization (ISO) and the International Dairy Federation (IDF). Through CEN/TC 302, those joint International Standards of methods of analysis and sampling for milk and milk products are, where applicable, introduced into the system of the European Union.

1.3 EU Dairy market

The dairy sector is of great importance to the European Union (EU) in a variety of ways. Milk production takes place in all EU Member States and represents a significant proportion of the value of EU agricultural output. For some Member States it forms a very important part of the agricultural economy. The EU's main producers are Germany, France, the United Kingdom, the Netherlands, Italy and Poland, which together account for about 70% of the EU production. The quota system, which had regulated the EU production volume for a period of more than 30 years, ended in 2015, following a revision of the Common Agricultural Policy (CAP) in general and the EU dairy policy in particular. More information and statistics can be found at the website of the Milk Market Observatory (MMO): http://ec.europa.eu/agriculture/milk-market-observatory/latest-statistics/productions-stocks_en.htm

2 BENEFITS EXPECTED FROM THE WORK OF CEN/TC 302

Specific European benefits for standards for sampling and analyses of milk and/or milk products are the following:

- Common sampling methods for milk and milk products;
- Common reference and alternative test methods for evaluating the safety, quality, and composition of milk and milk products;
- Elimination of commercial trade barriers between the European countries;
- Harmonization of national standards into EU standards;
- The support of EU legislation, predominantly on safety, health and environmental issues.

3 PARTICIPATION IN CEN/TC 302

Each CEN national standardization member is entitled to nominate delegates to CEN Technical Committee meetings and experts to Working Groups, if and where required, while ensuring a balance of all interested parties. Participation as observer for recognized European or international organizations is also possible under certain conditions.

CEN/TC 302 maintains at present official liaison with:

- [International Dairy Federation \(IDF\)](#);

Other organisations that CEN/TC 302 cooperates with include:

- [ISO/TC 34/SC 5 Milk and milk products](#);
- [CEN/TC 275 Food analysis - Horizontal methods](#);

Via its cooperation with ISO/TC 34/SC5 and IDF, CEN/TC 302 indirectly and/or informally cooperates with AOAC International and the Nordic Committee of Methods of Analysis of Foods (NMKL), too.

Those interested in participation in the activities of CEN/TC 302 can contact the national standardization organization in their respective country. However, regarding the aforementioned participation in work, the TC 302 decision to work fully and solely in accordance with the procedures of the CEN-ISO 'Vienna Agreement' should be taken into account. Experts will therefore be nominated to the project concerned in the ISO-IDF cooperation.

4 OBJECTIVES CEN/TC 302 AND STRATEGIES FOR THEIR ACHIEVEMENT

4.1 Defined objectives of CEN/TC 302

With respect to standards production, CEN/TC 302 has the following objectives:

- To supply adequate standards for methods of analysis and sampling for milk and milk products, requested by the EU in view of EU Directives and Regulations and other supporting EU documents;
- To supply standards eliminating commercial trade barriers between European countries, on the request of stakeholders;
- To supply EN-standards for new "European" subjects, when needed by enough CEN members and when it is more efficient to draft an EN rather than a national standard or even a global one.

4.2 Identified strategies to achieve the CEN/TC 302's defined objectives

In the light of these objectives CEN/TC 302 aims to provide a European platform for discussion between its national members on the following subjects:

- The objectives to have European Standards for a particular item;
- The relation between existing European standards and existing International Standards developed through the cooperative work of ISO and the International Dairy Federation (IDF);

CEN/TC 302 aims at safeguarding the relation between European standards and those from national, regional and global standardization organizations, e.g. with concern to each other's needs, alignments, deviations, etc. In that, the focus is primarily on adoption of international reference standards and secondary on the development of standards for which there is a specific European need.

Given the past resources, CEN/TC 302 made the decision to handle a maximum workload of about 35 work items. Its present and future activity is predominantly focused on considering which items and/or International Standards of the parallel ISO/TC 34/SC 5 Committee are priority needs for implementation on the European level. CEN/TC 302 works on these items within the framework of the available resources.

4.3 Environmental Aspects

Environmental issues that are associated with the projects within CEN/TC 302 are handled in the IDF Standing Committee on Environment. The objectives of this Standing Committee are:

- To consider energy efficiency and greenhouse gas emissions quantification and mitigation, including renewable energy generation;
- To assess water quality, efficiency and reuse;
- To consider biodiversity;
- To improve waste management and reduction;
- To review and adopt/promote best available technologies and practice;
- To contribute to work addressing the intersection of nutrition and environmental sustainability;
- To provide leadership on environmental sustainability issues in close liaison with other IDF Standing Committees and relevant third-party organizations.

Additionally, maximum restrictiveness is exercised with the inclusion of hazardous materials and chemicals in the development process of standards for methods of analysis and sampling.

With respect to promoting protection of the health of staff working with the standards, the text of the standards should adequately communicate any risks linked to chemical products and reagent used (e.g. by adding CAS numbers or by noting risks associated to reagents or other chemical used in the standard). If appropriate CEN guide 4 should be considered.

5 STRATEGIES ADOPTED TO REACH THE OBJECTIVES

CEN/TC 302 was established in 1992. During its first meeting, it decided to work in accordance with the "Vienna Agreement" of CEN and ISO with ISO lead. That decision was implemented in Resolution 12/1994.

Working in accordance with the procedures of the CEN-ISO 'Vienna Agreement' means that CEN/TC 302 strives to channel her standardization work into the working structure of the existing cooperation of ISO TC 34/SC 5 with IDF. Through CEN/TC 302, those ISO|IDF International Standards of methods of analysis and sampling for milk and milk products that are important for the European Market are also brought into the CEN system. However, if deemed necessary, CEN/TC 302 can decide to progress relevant work items on its own initiative. That may be appropriate where there is a specific European need in relation to EU Directives and supporting EU documents.

It is to be noted here that the secretariat of CEN/TC 302 is also the secretariat of ISO/TC 34/SC 5, which ensures efficiency in co-operation and alignment

Based on the aforementioned, CEN/TC 302 does not establish Subcommittees (SC) or Working Groups (WG) through which work should be carried out, unless for any (group of) item(s) for which technical development work must be done that cannot be done by ISO/TC 34/SC 5. For each of those items, which will be supported by a reference document, a project leader shall be appointed. Such WG(s) shall have a convenor, assisted by a secretary. Convenors and project leaders have professional Standardization support, provided by a CEN member body.

WG(s) may also be given the task to study the need for (a) standard(s) in a certain area, to advise CEN/TC 302 on which standards are needed and, on provisional support for any new work item(s), prepare the related formal new work item proposal(s) including (information on) a reference document. A WG, however, is not to embark on standards development work for any new item without prior approval of CEN/TC 302.

CEN/TC 302 has an ongoing work programme of new and maintenance work items. In view of overall limited resources, however, adequate prioritisation is needed to spread the TC 302 work evenly over time. CEN/TC 302 organizes its meetings once every two years.

6 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE WORK PROGRAMME

6.1 Resources

All professional contributors in the standardization work shall preferably be experienced individuals, with both CEN and ISO knowledge. The available support can generally cope properly with the average annual workload of CEN/TC 302 for the organization and co-ordination. The decision of CEN/TC 302 to implement existing joint International ISO-IDF standards, if available, through parallel CEN voting means that CEN/TC 302 can refrain from having an Editing Committee. The editorial work on the English and French versions is mainly done by ISO-CS and AFNOR. The translation into German and additional editorial work on the German (draft) standards are done by the editing department of DIN. However, the aforementioned capacity for translations by both organizations sometimes requires prioritization.

6.2 Risk analysis

The risk factors identified for CEN/TC 302 are in fact the rapid changes in the dairy sector. The factors mentioned below are influencing the standardization work both directly and indirectly.

6.2.1 Expertise

For certain items on the programme of work, both European as well as worldwide, less expertise is available. The availability of expertise is decreasing due to mergers, rationalisation of operations and reallocation of resources. The joint work of ISO and IDF is suffering from lack of experts as well, especially for less common items. Therefore CEN/TC 302 urges its members to call on experts from all interested stakeholders, i.e. dairy industry, competent authorities and research institutes, and (independent) laboratories to participate in the work. Otherwise, these phenomena can lead to:

- Lack of validated methods;
- Limitations to the applicability of tests and test results;
- Lack of experts available doing the work;
- Lack of expertise in general.

6.2.2 Funds

Lack of funds is an increasing problem that might lead to:

- No allowance for experts to participate in the standardization work;
- Problems with the validation of methods;
- Less laboratories available to organize and/or to participate in interlaboratory studies;
- Less research capacity for the development of certain (difficult) work items.

To address the aforementioned problems, a further optimization of the relationship with the EU DG Agriculture and Rural Development (DG AGRI) and EU DG Health and Food Safety (DG SANTE) needs to be pursued.