Ecosystem session: AGRI-FOOD

Clusters strengthening ecosystems
Needs and opportunities for the Agri-food Ecosystem

Blaga Popova Valentinova - Trade Affairs Officer at Food industry - DG GROW
Mapping of the agri-food system

- Research
- Public bodies
- Digital platforms
- Use consumption
- Dispose end of life
- HORECA
- Food packaging (circular)

- Digital platforms
- Retail
- (whole) sales
- Transport logistics
- Food processing
- Food waste circularity
- Storage
- Primary production
- Supply
- Suppliers of input

- Rural areas
- Cities

Food Supply Chain

- Farming
- Post harvesting
- Processing
- Distribution
- Retail
- Consumer
Lessons from the COVID crisis I

1. The importance of the Internal market
   - Barriers in internal market, logistical disruptions, boarder management
   - Free movement of workers
   - National measures

2. New conditions of work (distancing, shifts, hygiene etc.) and increase in costs

3. Impact on demand
   - Volatile demand
   - Different impact depending on the product/sector – high impact for SMEs
   - Impact HORECA closures - compensated only partially by higher household demand
   - Disruption of sales (e.g. linked to catering of big public events, school closures)
Lessons from the COVID crisis II

4. Global trade - export/import disrupted, rechanneling, increased transport costs

5. The food system showed resilience

6. Solidarity among food chain actors

7. Sustainability risks
   - Risks of more waste - perishable products could not be harvested in the first period (waste), some redirected to feed
   - Increased demand of disposable packaging

8. Uncertainty
Emerging trends and new opportunities

Changing Consumption patterns

- Beginning - demand for essentials and long shelf-life
- Increased demand for healthy products (immune boosters), organic
- Lower purchasing power - price is once again becoming key
- Attention to local products
- Proximity shops

New ways of working in the food chain – more attention to food hygiene, trust, co-operation

Increase in food e-commerce - inability for some operators to set up on-line channels
What next?

• **A Green recovery** - an opportunity to change

• **Acceleration of inevitable trends** – digitalisation, co-operation, new ways to interact with consumers

• **EU support policies** – RRF, Recovery Plans, Farm to Fork, CAP…

• New projects for the recovery

• **The role of clusters** 🌟
Ecosystem innovation
Shaping the future of food together

by Marjolein Brasz
MANAGING DIRECTOR FOODVALLEY NL
The year in which our food system offers food security to 10 billion people worldwide.

Tasty, affordable, healthy, and sustainable for people, animals and planet.

2050
Growing world population and urbanization
Hunger and malnutrition
Climate change,
Shortage of agricultural land and water
The time is now for a radical switch in our food system
Two brothers, both dairy farmers, started harvesting locally-cultivated soy to produce the first plant-based milk in the Netherlands.

Dutch biotech company In Ovo developed an ultra-fast screening technology that enables quick and automatic gender identification for breeding eggs.

A lot of **GOOD** is happening

More than 90% of the Dutch do not consume the recommended amount of 250 grams of vegetables per day.
Ecosystem innovation
Transition, how does it work

Systemic Change, what is needed
Systemic change

Achieving more and faster disruptive innovations

Creating new forms of cooperation throughout the chain, across sectors and borders

Developing, adopting and scaling new technologies
Roles and focus

- Research & technology development
- Socio-cultural changes
- Creation of preconditions
- Market creation

Source: Professor J.M. Cramer
Launch Foodvalley organization and network in the Dutch province of Gelderland.

**Mission**
Stimulating innovation in Dutch agro-food industry by fostering links and partnerships between business, knowledge institutes and government.

**2004**
WHERE FOOD IDEAS GROW

Launch Foodvalley organization and network in the Dutch province of Gelderland.

**2009**
REGIONAL DEVELOPMENT

Launch sister organization, Regio Foodvalley.

**Mission**
Developing top region for knowledge and innovation, with outstanding infrastructure and facilities for living, working and recreation.

**2014**
FOODVALLEY 10 YEARS

Global recognition as successful innovation network.

**Mission**
Growing global network and cooperation of businesses, knowledge suppliers, government and food clusters.

**2019**
TOWARDS ECOSYSTEM INNOVATION

Identifying impact for society and defining ten years strategy.

**Mission**
Determine interventions to systematic change our future food system.

**2020**
SHAPE THE FUTURE OF FOOD TOGETHER

Strengthen innovation ecosystem: global network that jointly work on the transition.

**Mission**
Growth from 11 to 26 employees.

**2030**
Food security to ten billion people worldwide.

**Mission**
Tasty, affordable, healthy and sustainable for people, animals and the planet.

**2050**
Ecosystem ambitions objectives

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Impact society

Ambitions & activities ecosystem

Interventions Foodvalley NL
Let’s connect!

circular agrifood

protein shift

food & health
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