



FP7 Research in the KBBE Sector

Cooperation between EU, the Balkan Region and the Eastern European Neighbourhood Area

Bucharest

25th January 2007



European Food and Drink Industry

This is key to Europe's overall competitiveness, economic growth and job creation.

- It is the *largest manufacturing sector* in EU (13.6 % in EU15).
- It had a *turnover* of €836 billion [EU-25] in 2005, representing 2.6% growth.
- It had *total exports* of €47.6 billion and a *positive trade balance* of €4.5 billion in 2005.
- It is a *major national and regional employer* with 4.1 million workers.

but

- It shows *only limited growth*, averaging 1.9% over the last decade.
- There are *better-performing global competitors*.
- Investment in *agro-food* is < mean of all European manufacturing sectors.



The Global Challenge: Improvement is Needed

- *Food and drink investment* in 2003 was 0.32%, **lagging behind** Japan, US and Australia, and **below** the European manufacturing average.
- European growth in *production value* over the last decade was **similar** to that of US, but **lower** than many competitors, especially Brazil.
- Europe performs **slightly better** in *value-addition* than US but **worse** than Australia, Canada and Brazil.
- Since 2002, Europe's *labour productivity* has **decreased** relative to the US and between 2000-2004 increased by 16% whereas the figure for Brazil was 27%.
- EU share of the global food and drink market has declined from 24% to 20% over the last decade.

Benchmarking Report on Food and Drink Industry Competitiveness, CIAA, 2006



ETP Food for Life

Primarily concerned with research, communication, training and knowledge transfer activities that *support and underpin innovation in the agro-food industry sector.*

Its outputs must be flexible enough to address *the full extent of European diversity.*



Food: Trends in Society

- *The function of food is changing:*
 - **what** we eat
 - **when** we eat
 - **where** we eat
 - **with whom** we eat
 - **how** we prepare our food
- *A wealth of choice:*
 - primary production: year-round, global supply chain
- *Changes in the food chain:*
 - increasingly complex
 - sustainability
 - importance of retail
- *Changes in the profile of the European consumer.*



The Role of SMEs

- The food and drink sector is highly fragmented, with SMEs contributing over €400 billion to the annual turnover.
- SMEs make up 99.1% of the food and drink business population [282,600 companies].
- *Most food companies, including SMEs, are genuine innovators.*
- SMEs employ 61.3% of the sectoral work force.

ETP Food for Life has established a Task Force to address innovation and knowledge transfer to SMEs

ETP Development

- First meeting of interested parties **November 2004**
- European Commission accepts ETP concept **February 2005**
- Stakeholder consultations **April, June 2005**
- ETP Food for Life launched on basis of Vision Paper **July 2005**
- Board and Working Groups established **September 2005**
- Two-step SRA process defined and agreed **December 2005**
- First Stakeholder Consultation **February 2, 2006**
- SSRA submitted to European Commission **April 2006**

- **Regional and national stakeholder consultations, March 2006 - January 2007**
 - First call of FP7 FAB theme, December 2006
- SRA to be published **April 2007**
 - Second call of FP7 FAB theme, summer 2007
- Implementation Plan to be published **December 2007**

ETP Food for Life Vision 1.

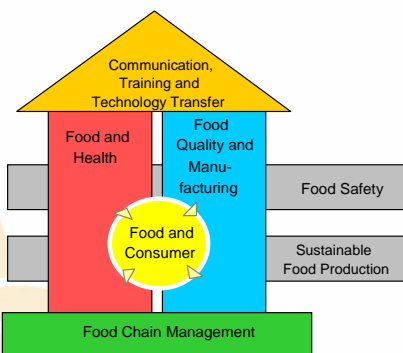
An effective integration of strategically-focused, trans-national, concerted research in the **nutritional-, food- and consumer sciences and food chain management** will deliver *innovative, novel and improved food products for, and to, national, regional and global markets in line with consumer needs and expectations.*

These products, **together with recommended changes in dietary regimes and lifestyles**, will have a *positive impact on public health and overall quality of life* ('adding life to years').

ETP Food for Life Vision 2.

Such targeted activities will support a successful and competitive pan-European agro-food industry having *global business leadership securely based on economic growth, technology transfer, sustainable food production and consumer confidence.*

European Technology Platform Food for Life



ETP Key Challenges

- Ensuring that the healthy choice is the easy choice for consumers.
- Developing a healthy diet.
- Developing value-added food products with superior quality, convenience, availability and affordability.
- Assuring safe food that consumers can trust.
- Achieving sustainable food production.
- Managing the food chain.
- Optimising communication, training and technology transfer.
- *Developing effective links with all other national and regional projects, networks, organisations.*

National Consultation Process

National Consultations = National Promotion + National Input

National Promotions have been held within 29 EU Member States, Candidate Countries, Associated States and Neighbourhood Countries, in national and international conferences and at a dedicated C/E European Regional meeting.

At these promotions an outline of the ETP has been presented, the terms of the consultation defined and questions answered. Individual national SWOTs are discussed and means of addressing them elaborated.

Regional-, National-, Organisational- and Individual Inputs have been submitted to the ETP website, www.ciaa.org.

ETP Food for Life: C/E European Regional Consultation



- Held in Bratislava, September 20-1st, 2006
- Involved industry, researchers, consumer bodies, regulators, national funding agencies
- Jointly supported by FP6 and the Central European Initiative, CEI
- Representatives from 13 countries, including **Belarus, Bulgaria, Croatia, Romania and Ukraine**
- Reports circulated within **Albania, Georgia, Macedonia, Moldova and Serbia**
- Informal Neighbourhood Country network established.

National Food Platforms



- As a result of ETP promotions, a number of countries [**Austria, Belgium [Flanders], Czech Republic, Denmark, Estonia, Finland, Germany, Hungary, Italy, Latvia, Lithuania, Norway, Poland, Romania, Russia, Slovakia, Sweden, The Netherlands, Switzerland, Turkey, Ukraine**] will establish *national food platforms* [or *clusters*] to bring together stakeholders in the food chain at national level.
- Such national food platforms will *facilitate communication and interaction with the ETP*.
- Clear benefits will accrue from a *network of national food platforms*.

Network of National Food Platforms



These platforms are being networked with the ETP to:

- ✓ enhance their "voice" within the European Parliament and Commission
- ✓ identify and promote regional issues,
- ✓ optimise transfer of experience and best practice, and
- ✓ offer support and encouragement to countries considering setting up such platforms.

The network coordinator is Dr Kitti Németh, nemeth@vup.sk

The inaugural meeting of this network will be held in Rome, 14th April 2007

A Successful ETP Food for Life will



- Drive **European competitiveness** based on the size of the F&D sector and the transition foreseen towards *high value-added products* with a major focus on *well-being and welfare*,
- **Positively impact on Community policies**,
- **Boost research performance** and facilitate trans-national training and research co-operations,
- **Sustain career development** in food R&D in Europe and promote entrepreneurial activity,
- **Encourage the new generation** of European food scientists and technologists,
- **Reduce fragmentation** by creating a shared Common Vision and managing an effective Implementation Plan for the Strategic Research Agenda.

An effective public-private partnership is essential to turn the vision into reality.

The Big Challenges



- Develop the **Strategic Research Agenda and Implementation Plan**
- Establish the ETP **Mirror Group**, the interface of the ETP with national funding bodies [93% of European research funding comes from national programmes]
- Optimise **public/private funding** of agro-food research
- Engage with the **SME sector**
- Promote "**research for innovation**"

The Big Challenges



- **Communication, training and knowledge transfer**
 - **Internal:**
 - WGs
 - Board, Operational Committee
 - Mirror Group
 - **External**
 - Other KBBE ETPs
 - Other ETPs
 - European Action Plan on Diet, Physical Activity and Health*
 - FP6 projects, National projects
 - Professional bodies
 - EUREKA, COST, ESF, EFSA

ETP Food for Life

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- This is a **European** Technology Platform and must be flexible enough to address *the needs and situations of all regions of Europe*.
- To maximise its impact it needs the support and commitment of *all stakeholders in all regions of Europe*.
- During its long-term programme [2020 and beyond] there will be significant economic and political changes in countries adjacent to the EU which the ETP must take into account. *This process of engagement needs to begin now*.
- The ETP needs the *expert input* of stakeholders across SE Europe, the Balkans and the Eastern European Neighbourhood Area so that *this region, its industries, its researchers and its citizens can gain the maximum benefit from our programme of activities*.

ETP Food for Life

www.ciaa.be



Please visit our website and make your input into our consultation, v.rimbert@ciaa.be.

Please let us know if you would like to assist with the ETP.

Please tell your friends and colleagues about our activities.

Without *your* support, our progress will be much more difficult and our overall impact lessened.

ETP Food for Life



If you have any queries or would like additional information, please contact

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Thank you very much for your attention.