
Kees de Gooijer
CEO Food & Nutrition Delta
Food & Nutrition Delta is an Innovation program.

From companies, for companies, with companies.

Owned by the foundation FND, supported by and executed in dialogue with the ministry of Economic Affairs.

Built together with the ministries of Agriculture, Nature & Food Quality, and Public Health.
An innovation programme?

One single comprehensive plan within a Top domain (Food)

Projects in an Open call. (Trust)

Demand Driven

With TIFN knowhow

Inside & Outside EZ

Trade & Export

International

Acquire investments

National

Deal with Human Capital

Regional

New combinations

TNO

A&F

NIZO

Polytechnics

Machine builder

Food SME

Multinational

Food SME

Machine-product company

Click to buy NOW!
Contents

- Trends
- Networks: Dutch approach: Food & Nutrition Delta
- Status update: Performance 2006 and 2007
Trend: Globalisation

- WTO influence: moving towards global trade
- Travel: global kitchen everywhere
- As reaction: regional and seasonal products
- Retail as customer and competitor
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Trend: Convenience / Speed

- Living the fast life during the week
- Compensate with slow cooking in the weekend
Trend: room for stories again

- Willingness to spend, right product at the right time (pancake effect)
- Room for stories & dreams again; Passion has to show
- New attention for Environment
- Create experience products

Pictures courtesy of Jempi Moens & Foodstep b.v.
Trend: think about health

- A society-wide trend for the long(er) term: Health...

- Adapt to that as a chance, rather than a threat!
Driver #1: the Economy, 
Food Sector in the Netherlands

- 47.5 billion € revenues in Agrofood sector,
- Which is 25% of the total industry, or
- 10% of Gross National Product.
- 600,000 fulltime jobs.

excluding:
- Metalindustry:
  - 3 billion € processing industry;
  - 2 billion € input & fresh machinery;
- 2 billion € packaging industry;
- 1 billion € R&D workers.
Driver #2: Health

Many chronic diseases food-related

- Coronary
- Cancer
- COPD (w.o. astma/allergy)
- Limbs
- Obesity
- Sleep apneu

€ 2.3 billion
€ 0.4 billion
€ 0.6 billion
€ 1.0 billion
€ 0.5 billion

VWS okt-2003
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Obesity..
Obesity trends among adults, USA 2007

(*BMI ≥30, or ~ 30 lbs overweight for 5’4” woman)

Source: Behavioral Risk Factor Surveillance System, CDC
## Risk factor

<table>
<thead>
<tr>
<th>Risk factor</th>
<th>Deaths/year</th>
<th>DALY’s</th>
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</thead>
<tbody>
<tr>
<td>Smoking</td>
<td>20,000</td>
<td>440,000</td>
</tr>
<tr>
<td>Obesity</td>
<td>8,000</td>
<td>170,000</td>
</tr>
<tr>
<td>Physical inactivity</td>
<td>8,000</td>
<td>135,000</td>
</tr>
<tr>
<td><strong>Unhealthy diet</strong></td>
<td><strong>7,000</strong></td>
<td><strong>137,000</strong></td>
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<tr>
<td>Alcohol</td>
<td>2,200</td>
<td>195,000</td>
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<tr>
<td>Accidents (home)</td>
<td>2,200</td>
<td>52,500</td>
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<tr>
<td><strong>Accidents (traffic)</strong></td>
<td><strong>1,200</strong></td>
<td><strong>85,000</strong></td>
</tr>
<tr>
<td>Air pollution</td>
<td>1,300</td>
<td>1,800</td>
</tr>
<tr>
<td>Radon in houses</td>
<td>800</td>
<td>7,900</td>
</tr>
<tr>
<td>Passive smoking</td>
<td>530</td>
<td>6,300</td>
</tr>
<tr>
<td>Legionella in drinking water</td>
<td>80</td>
<td>560</td>
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</table>
Driver #2; positively:

- Health is an issue to consumers
- NIPO: Healthy Living=
  - Sleep well, Eat a varied & healthy diet, Relax (all at 65%)

26-4-2007
16-4-2007
15-5-2007
VK, 29-9-7

1,36
0,95

Deep-fried snacks / week, Catering. Foodstep, N=12000

2007 2008
Health? Really?

<table>
<thead>
<tr>
<th>Year</th>
<th>AH</th>
<th>Own Brand</th>
<th>HCC</th>
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<tbody>
<tr>
<td>2005</td>
<td>100</td>
<td>100</td>
<td></td>
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<tr>
<td>2006</td>
<td>109</td>
<td>123</td>
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</table>

Healthy Choice Clover

My Choice

Less fat cheese

2005: 87M€
2006: 100M€
(10% v/v, 15% v/€)
2007: Milner +33%
The Programme

F&N Delta

Aim: NL is a leading F&N innovation region in Europe: the Dutch food industry has a strong, sustainable competitive edge worldwide.

ROS Business growth for F&N is at least 1.225 M€, power of the Dutch Industrial/Technological Infrastructure and capacity for Innovations has been enforced.

Building phase 1: the pre-competitive research agenda

Phase 2: Join forces for joint development & implementation

More innovating companies

Yep, this is where the SME’s come in!
The building of phase 1: A) Start with consumer needs

- Nutrition & Health
  - Body shape
  - Resistance
  - Sense of well-being
- Food & Structure
  - Great taste
  - Great texture
  - Great convenience
- Food & Safety
  - Feel totally secure about food
- Consumer Behaviour/Communication
  - Best behaviour for own well-being
  - Social interaction

Quality of life for the Elderly
Kids Health
Avoidance of chronic diseases

2008-11-27 The Hague
The building of p1: B) Link with business opportunities

**Quality of life for the Elderly**

- Underlying needs
  - Maintain mental performance
  - Avoid fractures
  - Avoid sensory loss
  - Maintain muscle function
  - Avoid sleep disturbances

- Functional targets
  - Prevent cognitive decline
  - Improve mood

**World market**

Above 1 billion and growing

- Scientific targets
  - Optimised fatty acid composition
  - Increase serotonergic activity
  - Personalised diet composition
  - Regulate inflammation
  - Anti-oxidative networking

- Research programme

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PD FXCHANG

2008-11-27 The Hague
FND-programme

FND-phase 1

FND-phase 2

- Aim: open innovation
- No threshold, open call system
- Development, rather than Research
- 63.5 million € government support, 2006-2010
- Total budget hence over 180 million €
Approach 2008

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Idea test  Feasible?  Innovate
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Frans van den Berg
Adjacent technology

Wouter de Heij
Safety & Conservation

Nico Heukels
Consumer behaviour

Peter Sakkers
Bioingredients & Functionality

Albert Zwijgers
Food & Health

Kees den Uijl
Sensory & Structure

2008-11-27 The Hague
Key figures:
- Total 529 participants, 448 companies.
- Project (k€) participants: 163.
- In 109 projects.

Result aimed at:
- 70% product,
- 30% process for a product.
Key figures:
- 109 projects ongoing, 161 applications.

Instrument use:
- Feasibility 3,3 M€ in 75 projects;
- Innovation projects 18,7 M€ in 34 projects;
- 22 M€ grants resulted in 52,2 M€ project budgets.

Budget-to-groups:
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Innovation pyramid: 1560 companies with >10 fte

Expected

<table>
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<th>Perc.</th>
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<tr>
<td>6</td>
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<tr>
<td>100</td>
<td>High</td>
</tr>
<tr>
<td>500</td>
<td>Low</td>
</tr>
<tr>
<td>960</td>
<td>XX-low</td>
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Realisation

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<tbody>
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<tr>
<td>47</td>
<td>47%</td>
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<tr>
<td>65</td>
<td>13%</td>
</tr>
<tr>
<td>96</td>
<td>10%</td>
</tr>
</tbody>
</table>

160 “new” companies
Read more? www.foodnutritiondelta.nl
Complete plan, and summary on 2 sheets downloadable
Consumers pick up the health issue quickly!
Many producers follow the health trend!
What’s your next step?