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CEO Food & Nutrition Delta
Food & Nutrition Delta

FND is....

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

International

National

Regional

Trade & Export

Acquire
investments

Deal with
Human Capital

TNO

NIZO

A&F

Polytechnics

Machine builder

New combinations

Trust

New ideas,
new combinations

With TIFN
knowhow

Demand
Driven

Food SME

Multi
national

Food SME
Content

- 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

2008-11-27 The Hague
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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.
Many chronic diseases food-related

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

- € 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
<table>
<thead>
<tr>
<th>Risk factor</th>
<th>Deaths/year</th>
<th>DALY’s</th>
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<tbody>
<tr>
<td>Smoking</td>
<td>20.000</td>
<td>440.000</td>
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<tr>
<td>Obesity</td>
<td>8.000</td>
<td>170.000</td>
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<tr>
<td>Physical inactivity</td>
<td>8.000</td>
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<tr>
<td>Unhealthy diet</td>
<td>7.000</td>
<td>137.000</td>
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<td>195.000</td>
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<tr>
<td>Accidents (home)</td>
<td>2.200</td>
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<td>Accidents (traffic)</td>
<td>1.200</td>
<td>85.000</td>
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<tr>
<td>Air pollution</td>
<td>1.300</td>
<td>1.800</td>
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<tr>
<td>Radon in houses</td>
<td>800</td>
<td>7.900</td>
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<tr>
<td>Passive smoking</td>
<td>530</td>
<td>6.300</td>
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<tr>
<td>Legionella in drinking water</td>
<td>80</td>
<td>560</td>
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Driver #2; positively:
Health is an issue to consumers
NIPO: Healthy Living=
Sleep well, Eat a varied & healthy diet, Relax (all at 65%)
Deep-fried snacks / week, Catering. Foodstep, N=12000
**Food & Nutrition Delta**

- Healthy Choice Clover
- My Choice
- Less fat cheese

**Health? Really?**

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<th></th>
<th>AH</th>
<th>Own Brand</th>
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<td>100</td>
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<td>2006</td>
<td></td>
<td>109</td>
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2005: 87M€
2006: 100M€
(10% v/v, 15% v/€)
2007: Milner +33%
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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

More innovating companies

Building phase 1: the pre-competitive research agenda

Phase 2: Join forces for joint development & implementation

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

World market
Above 1 billion and growing

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

Functional targets
Prevent cognitive decline
Improve mood
............

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

The building of p1: B) Link with business opportunities
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

UM / Nutrim
U Twente
TU Delft
TIFN

RUG

HAS Den Bosch
TI Pharma

Green Genetics

Friesland Foods

Resato

WUR

Aquamarijn

TNO

Broker

Idea test
Feasible?
Innovate

Yourself
Food & Nutrition Delta

The Innovation Brokers

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
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:
Innovation pyramid: 1560 companies with >10 fte

Expected

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<tr>
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<tr>
<td>500</td>
<td>Low</td>
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<tr>
<td>960</td>
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Realisation

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<td>13%</td>
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<tr>
<td>96</td>
<td>10%</td>
</tr>
<tr>
<td>160</td>
<td>“new”</td>
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Vouchers

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?