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TRADITIONAL FOOD NETWORK TO IMPROVE THE TRANSFER OF KNOWLEDGE FOR INNOVATION

1st MSW WP8 Novi Sad

WP2 Grains

Inventory of Needs (IoNs) and SWOT

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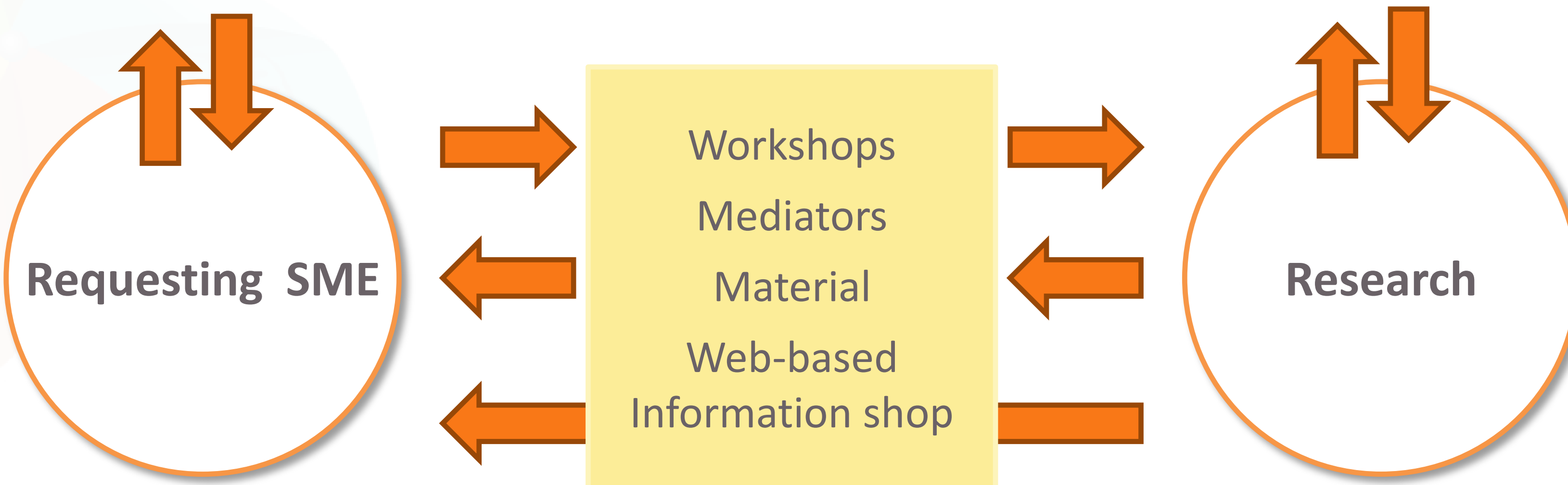
Status Quo (Casado)

What SMEs would need:

- **Information that is structured according to their needs:** Products - Problems - Solution - Innovation
- **Lowering the barrier to acquire the needed information:** Easy to access first contact in the own language



Impact (Casado)

- Improved **communication** between SMEs and research institutions
- Higher **consumer satisfaction** on traditional food supply
- Reinforced **entrepreneurship** of food researchers and SMEs
- Increased **competitiveness** of SMEs in traditional foods

Content

1. Inventory of Needs (IoNs)
2. From IoNs to Multistakeholder Workshop (MSW)
3. SWOT analysis

1. IoNs

Aims WP2 Grains – The issues

- Crops
  - Spelt wheat (D: SIG; NL: DLO, NBC)
  - Durum wheat (F: INRA)
  - Oat (NL: DLO)
  - Buckwheat (SL: UL; PL: IAR&FR)
- Technologies
  - Bakery and Sourdough (D: SIG; NL: NBC)
  - Gluten-free (IE: UCC; NL: DLO)
  - Brewing (NL: DLO)

Aims WP2 Grains – Steps

- Identification of SMEs in traditional grain products
- Inventory of Needs (IoNs) through questionnaires and interviews with identified SMEs
- Identification of relevant EU and national projects for transferrable innovations
- Multi-Stakeholder Workshop with partners (MSW)
- Training Workshops with SMEs (TWS) (knowledge transfer)
- Identification of issues for the Strategic Research and Innovation Agenda (SRIA)

WP2 Grains – Actions (1)

- Identification of and interviews with SMEs
  - Germany: 16 (bakeries [8], pasta comp [2], millers [4], farmers [3])
  - Netherlands: 24 (bakeries [15], pasta comp [1], brewers [1], millers [1], farmers [3], chain co-ordinators [3], branch organization [1], demonstration [1], seed comp [2]) (some combined)
  - Ireland: 20 (gluten-free companies)
  - France: 30 (identified; 19 interviews: pasta comp [9], grain producers and pasta comp [7], cooperation [2], miller [1])
  - Slovenia: Products and producers identified and contacted; no free communication

WP2 Grains – Actions (2)

- Identification of Projects
  - Poland: Identification of national stakeholders and projects in grain research
  - Netherlands: Identification of national projects and stakeholders; listing of EU initiatives and projects provided by partners (all subjects)
  - Slovenia: EU projects (bakery)
  - EBN and FDE: EU projects (entrepreneurship and market)

2. Multi Stakeholder Workshop

Aims of the MSW (1-2 Oct 2014 Wageningen)

- Qualitative analysis of identified needs (SWOT)
  - Primary production and raw materials
  - Food processing and food safety
  - Products and market
- Prioritizing needs
- Integration with other WPs (WP6; WP7)
- Co-operations with other organisations and projects (TRADEIT; AOECS)

MSWs - Participants

- Javier Casado Hebrard (Hoh)
- Hartmut Welck, (SEZ)
- Peter Raspor, (UL) (WP2; WP6)
- Emanuele Zannini; Stefan Horstman (UCC)
- Malgorzata Wronkowska (PAN)
- Sandra Mandato (INRA)
- Rebeca Fernandez (FDE)
- Flip van Straaten (NBC)
- Isobel Fletcher (EBN/SPI) (WP7)
- Bianca Rootsaert (AOECS)
- Jeroen Knol; Karsten Schmidt (TRADEIT)
- Clemens van de Wiel; Luud Gilissen (DLO)

3. The SWOTs (from each partner)

A SWOT analysis of the investigated traditional grains and food products

Strenghts	Weaknesses
- Producer's personal motivation - Increasing crop and product diversity - Experience in establishing new production chains (e.g. gluten-free) - Knowledge on oat health (EFSA claims)	- Knowledge on health issues (spelt) - Authenticity and breeding (tests needed) - Seed storage and purity (farm-saved) - Knowledge on farming (spelt; oat) - Small scale packaging (time; printing costs) - Logistics (within chain; of products) - HACCP; SKAL; Labelling in general - Partner commitments in production chains
Opportunities	**Threats**
- Consumer's interest in health and local (market) - Communication (social media) - New markets for waste material (e.g. hulls, straw) - Product innovations (spelt pasta; oat beer)	- Price (Free Riders; false competition) - Shortage of primary product (spelt) - Push market (oats) - Verbal agreements in production chains - Hygiene and product loss - Limited research funds

A SWOT analysis of french durum wheat sector

Strengths	Weaknesses
- Structured sector - Good quality of grains (protein level) - Proximity of production & transformation sites - Popular food products	- Yield stagnation (particularly in the Mediterranean basin) - Decrease of production surface areas (-22% between 2012 and 2013) - Energy-intensive transformation processes
Opportunities	**Threats**
- Nearby targeted markets (Europe, Maghreb) - Health food (whole grain, fiber, Mediterranean diet) - Local & traditional production - Organic production	- Competition with other countries (Maghreb, Canada, USA) - New Common Agricultural Policy - Environmental & sanitary regulations - Climate changes - Evolution of consumer habits

A SWOT analysis of the investigated traditional food

Strenghts	Weaknesses
• Hands on product development • Comprehensive craftsmanship is driving innovation • Strong local networks is helping quick info exchange	• Limited knowledge of sourcing special wheat cultivars and specific benefits • No check on identity preservation madre cultures • Poor process control limits product development and up scaling • E-number often still necessary for process control
Opportunities	**Threats**
• Many high end market niches as yet under exploited • Usage marketing tools might yield higher revenues	• Lack of identity check might lead to poor quality control, and hence to blotting product image • High end artisan bakery products with artisan look&feel might easily be produced on industrial scale at lower cost

A SWOT analysis of the investigated GF food

Strengths	Weaknesses
• Health food • Local markets • Labelling • Interest in improving	• Efficiency • Food safety • Knowledge about the product • Gluten products don't stay fresh as long as wheat based pastries • Gluten free products are more expensive than their gluten-containing counterparts • Taste of GF products will be compared to their gluten-containing counterparts
Opportunities	**Threats**
• Regional, national markets • External advising • Collaboration with higher education institutes • Awareness of celiac disease is growing • Movement toward healthier lifestyle • Consumers without celiac are choosing Gluten Free diets as a part of their life • Changing technology allows for additional methods to reach consumers and make them aware of new products	• Current inconsistencies in quality and the lack of guaranteed volumes • Differences in labelling regulations in different countries/continents • Global economy uncertainty • Competition: Large, already established producers, Existing brand loyalty • Adversion of bread products: people with gluten allergy may choose to avoid bread • Cross contamination: Bread and facilities must be 100% gluten free

A SWOT analysis of the investigated traditional food (only bakeries)

Strenghts	Weaknesses
• popular food products • consumers know the brand (small bakeries) and trust them • good regional market position • processing knowledge	• raw material (quality/prize) • knowledge on health issues • efficiency • marketing know-how
Opportunities	**Threats**
• health food • local & traditional production • new market for waste material (e.g. buckwheat hull)	• competition with big bakeries/supermarket • competition with other small bakeries • evolution of consumer habits • limited research funds

Strengths	Weaknesses
• Close link to customer • Traditional products • Well handling of current technology/process	• No reliable analytical fast methods • Not free/open to say what they think • Expensive Analysis • MORE STRICT CONTROL, EDUCATION OF THE SUPPLIERS • DIRECT LABELLING OF BREAD
Opportunities	**Threats**
• New processing • solution for wasted bread • marketing/ labeling • own devices for making analysis (quality of grain) • ECO PROGRAM • OWN PACKAGING LINE, OWN PACKAGING MATERIAL • Variety of different/similar products	• Quality of raw material • Energy • GMO pressure, • gluten free /alegrenisity • (challenges in hygiene)

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A SWOT analysis of the investigated traditional food (all respondants)

Strenghts	Weaknesses
- Close linkage and trust with consumers - Quality and safety of products - Processing Knowledge - Traditional, regional, innovative - Good regional market position - A lot of certifications were used (bio, demeter, slow food, clean label..)	- New processing technologies / knowledge (e.g. pseudocereals , non-cereals for bakeries) - Innovative packaging - Rarely new media (e.g. social media) used - Marketing know-how (how to better attract consumers, USP)
Opportunities	**Threats**
- New processing technologies - Innovative marketing of traditional food - Innovative packaging solutions	- Quality and supply of raw material - Losses due to vermin - Higher energy costs - Regulations (like approval of starter cultures) - Concurrence

SWOTs

Summarized Weaknesses and Threats from all WP2 partners

Weaknesses compared with Threats from SWOTs. Each aspect was rated as to its priority on a scale of 1-5.

Weaknesses	Threats
Energy: processes 3	Energy, use of waste products 4
Supply: yield, problem of knowledge (breeding, agronomy, GxE) 5 Diversity of sources, varieties/new technologies: functionality (provenance, seed suppliers) 5	Supply (shortage with high demand, climate change) 5
Batch inconsistency ingredients: efficiency production chain, price 5	Quality: End product cross-contamination 5 Batch inconsistency of raw material 5 (climate change)
Health info (claims, benefits): knowledge e.g. spelt 5	Markets (lack in knowledge, story-telling/social media, consumer education, SME flexibility): aversion of products, consumer habits/emotions 5
Packaging & labelling, marketing, new media: problems of scale 5 Clean label, practicality 3	Regulations, labelling (CAP) 5 Cost of small-scale production, labelling/certification 5
Authenticity: spelt, varieties 5 Identity/stability: starter cultures sourdough 3 Quality farm-saved seeds 3	Authentication 5
Chain organization: partner agreements/contracts, logistics: problems of scale 3	Agreements in production chains 3
Shelf life (gluten-free) 5	Product loss (quality going down), waste products, bigger problem in glutenfree 4
Food safety: contamination, nutritional 5	Hygiene may be problem but difficult to establish, rules vary among MS 2
	Competition (free-riders or large producers producing artisanal products, from outside EU), prices 3

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Traditional Food Network to improve the transfer of knowledge for innovation

SWOT analysis: results

Main Keywords extracted from comparison of Weaknesses and Threats from SWOTs:

Supply/diversity

Knowledge transfer raw material/processing/ functionality

Authenticity

Marketing/labelling

Shelf life

Food safety

Thanks for your attention