



# GLUTEN FREE COMPETENCE CENTER



GLUTEN FREE COMPETENCE  
VILLAGE VENLO

# FOUNDING PARTNERS

arvalis

*Claire Souren*



**VANDINTER SEMO**  
SEED & SERVICES

*Bert-Jan van Dinter*

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*Jacques Mikx*



**glutenvrijtotaal**

uw glutenvrije totaal leverancier

*Paul van Ginkel*

GLUTEN FREE COMPETENCE CENTER

# GLUTENFREE PRODUCTS... MARKET?

## THREE CUSTOMER GROUPS:

- People diagnosed Coeliac
- People with symptoms of Coeliac (without diagnose)
- Health conscious consumers

> 1%

# GLUTENFREE PRODUCTS... MARKET?

**Worldwide GF market in 2018: € 5,5 miljard**

average growth 2013-2018: 10,2% per year

**Market Europe in 2018: € 1,6 miljard**

average growth 2013-2018: 10,4% per year

# AMBITION GFCC

# INNOVATION



**100% glutenfree**  
controlled and certi-  
fied



**One location**  
for all products



**Qualified**  
personnel



**(Regional) natural**  
**resources**  
low CO<sub>2</sub> footprint



# INNOVATION



**Advisory Board,**  
science and  
commerce



**Intensive cooperation**  
with leading  
university's  
worldwide



**Quality**  
lab development

# PROCESSES

**MILLING**

**BLENDING & MIXEN**

**FLAKING & FLATTING**

**PRECOOKING**

**PUFFING**

**EXTRUDING**

**BULK STORAGE**

**PACKAGING**

# DEDICATED PROCESSING

**BAKING LINES**

**CEREAL LINES**

**BAR LINES**

**PASTA LINES**



# THE MISSION

**Providing a full service on GF toll manufacturing  
and R&D testing in the Netherlands**

# THE MISSION

**A unique 100% glutenfree development & toll manufacturing centre for a variety of different cereals**

# THE MISSION

**ALL PRIMARY PROCESSES UNDER ONE ROOF**

# THE MISSION

**LINKED TO ALL RELEVANT SCIENTIFIC CENTERS  
IN THE WORLD WITH GLUTEN-FREE EXPERTISE**

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# THE PROCESS

## INVENTORY CONCEPT GFCC

(International) market interviews  
(ca. 100) *Beeld landen*

### B2B

- Potential customers
- Suppliers
- Partners

R&D (NI)

# THE PROCESS

## CONCLUSIONS REFERENCE VISITS (100)

Glutenfree market is evident:

- Market research 'Glutenfree Products' from Markets & Markets (2013) confirmed in practise
- A lot of companies have glutenfree market at strategic agenda

# THE PROCESS

## CONCLUSIONS REFERENCE VISITS (100)

- High barrier to invest because of sanitary and economic motives
- Toll manufacturing good option

## Welcome to GLUTEN-FREE village



1.

### ONE STOP GLUTEN-FREE

The market for gluten free products is increasing rapidly. In response to this growth, many manufacturers are looking for production capacity without the hassle of extreme cleaning and contamination risks. The Gluten-Free Competence Center in Venlo offers the answer to this need. ONE STOP GLUTEN-FREE means that we can provide a full service on toll manufacturing and R&D testing. Furthermore we are linked to all relevant scientific centers in the world when it comes to gluten-free expertise.

- Production and development site with various production lines, both multi client and dedicated;
- Development R&D facilities;
- Only processing of 100% gluten-free crops;
- Strong logistics position in Europe;





## Primary Production

GFCC is a unique 100% gluten-free development & toll manufacturing centre for a variety of different grains. All primary processes **under one roof**. For the time being the following production lines are installed (or planned to be) in the centre;

- Storage facilities for raw materials (silos)
- Milling line
- Precooking line
- Extruding line
- Puffing line
- Mixing line
- Flaking line
- Packaging line
- Coating line



## Secondary Production (dedicated)

- Bread
- Pasta
- Mixtures
- Bars
- Etc.
- Packaging



For more information  
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# LESSONS LEARNED

## GFCC CONCEPT COULD NOT STAND MARKET TEST

R&D department GFCC economically not feasible:

- Companies don't prefer development outdoors (because of protection IP)
- Testing can also take place in gluten environment

# LESSONS LEARNED

## TOLL MANUFACTURING CAN BE INTERESTING BUT:

- Prices are compared with 'conventional gluten production environments' where prices are completely squeezed
- Toll manufacturing at GFCC for end products comes with extra logistic movements and costs

# LESSONS LEARNED

## DEMAND FOR INDEPENDENT KNOWLEDGE CENTER

- Lack of information
- Science/media have different, sometimes contradictory visions

# LESSONS LEARNED

## RETAIL REQUIRES TOTAL PACKAGE

**Retail organisations ask for facilitation in total concept of glutenfree products**

# LESSONS LEARNED

## CUSTOMER NEED

**Coeliac patients and health conscious consumers look for products with higher nutritive value, better taste and reliable gluten-free**



# LESSONS LEARNED

## MARKET POSITION

**It is important to create a solid market position in the GF chain**

**A position as toll manufacturer solely is vulnerable**

# LESSONS LEARNED

## MARKET POSITION

**Approaching the market with a total concept is promising**

**More sustainable business model**

**New vision has led to Glutenfree Trading Center**

# GLUTENFREE TRADING CENTER

## NEW VISION: GLUTENFREE TRADING CENTER

**Total package – requirement retail**

**Demand for quality GF products (higher nutritive value and taste)**

**Much lower investment – lower risks**

# GLUTENFREE TRADING CENTER

## CONCEPT INNOVATION:

**Building a “movement” with a trendy GF brand for health conscious consumer (away from diet corner)**

**Creating customer loyalty**

# GLUTENFREE TRADING CENTER

## PROPOSITION CONCEPT (BRAND VALUES):

- ✓ Reliable
- ✓ Healthy
- ✓ High quality and nutritve value
- ✓ Tasty
- ✓ Easy
- ✓ Trendy
- ✓ Good value for money



# GLUTENFREE TRADING CENTER

OFFERING A TOTAL ASSORTMENT OF GF  
PRODUCTS:

- ✓ Bread
- ✓ Cereals
- ✓ Pasta
- ✓ Bars
- ✓ Biscuit
- ✓ Snacks
- ✓ Etc.

# GLUTENFREE TRADING CENTER

## NEW VISION: GLUTENFREE TRADING CENTER

Where are we standing right now?

Concept has been developed and is being tested  
by retailers

# THANK YOU FOR YOUR ATTENTION

## QUESTIONS?

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