

Landbouw Innovatie Brabant

Samenwerkingsverband Provincie Noord-Brabant - ZLTO

Bezoek delegatie uit Noord-Brabant aan de regio Emilia Romagna 14-16 juni, illustratief weergegeven in deze PowerPoint

LIB werkt samen met partners uit Emilia Romagna in diverse Europese projecten: Eurodairy, EU-PIG en STRING. En er zijn kansen voor intensievere samenwerking met diverse partijen uit de regio.

Geert Wilms, 3 juli 2017

Brabant delegation



Ricard Pares, Porcat Nancy Aschman VION Stijn Markusse, Boerschappen Leon van de Moosdijk, Someren



Marjon Krol, ZLTO Kees van Aar, VPO Pieter de Boer, Provincie NBr Edo Dijkman, HAS



Marieke Moorman, VBG Ad Kemps, Coppens Annelies Schoenmakers, NBr Guus van Roessel, Melkvee



Hans Huijbers, ZLTO Anne-Marie Spierings, prov NBr Hans Verhoeven, De Hoeve



Erwin van der Wielen, Varkens Janny van der Heijden prov NBr Geert Wilms, LIB

Province North-Brabant, regional Minister Agriculture & Energy	Anne-Marie Spierings
Farmersorganisation ZLTO (15.000 members), chairman	Hans Huijbers
LIB (Agricultural Innovation Brabant), director	Geert Wilms
Province North-Brabant, Agrofoodmanager (STRING)	Pieter de Boer
Province North-Brabant, director Agriculture	Annelies Schoenmakers
ZLTO, STRING-manager	Marjon Krol
Co-owner Added Value concept 'De Hoeve', pigs (million pigs/yr)	Hans Verhoeven
HAS Den Bosch, university of applied sciences, animal production	Edo Dijkman
VION food, group communication director	Nancy Aschman
Coppens Feeds, innovation director	Ad Kemps
VBG, chairman and mayor Bernheze	Marieke Moorman
Alderman Someren	Leon van de Moosdijk
Lely Agriculture and Dairy, Dairylink and dairyfarmer	Guus van Roessel
Pig Producer and owner Water laboratory	Erwin van der Wielen
Boerschappen (short quality supply-demand chain), owner	Stijn Markusse
Pig Producer and training centre in the pig business	Kees van Aar
Province North-Brabant, innovation manager en STRING support	Janny van der Heijden
SPAINT, Director of PORCAT	Ricard Parés



Emilia Romagna, Noord-Italië (Po-vlakte)

Ruim 4 x zo groot als Noord-Brabant

4.5 miljoen inwoners

Hoofdstad Bologna

Regionale economie is 1,5 x zo groot als in Noord-Brabant



THE AGRIFOOD SYSTEM OF EMILIA-ROMAGNA

Simona Caselli, June 14-2017



Regione Emilia-Romagna

Regional Minister

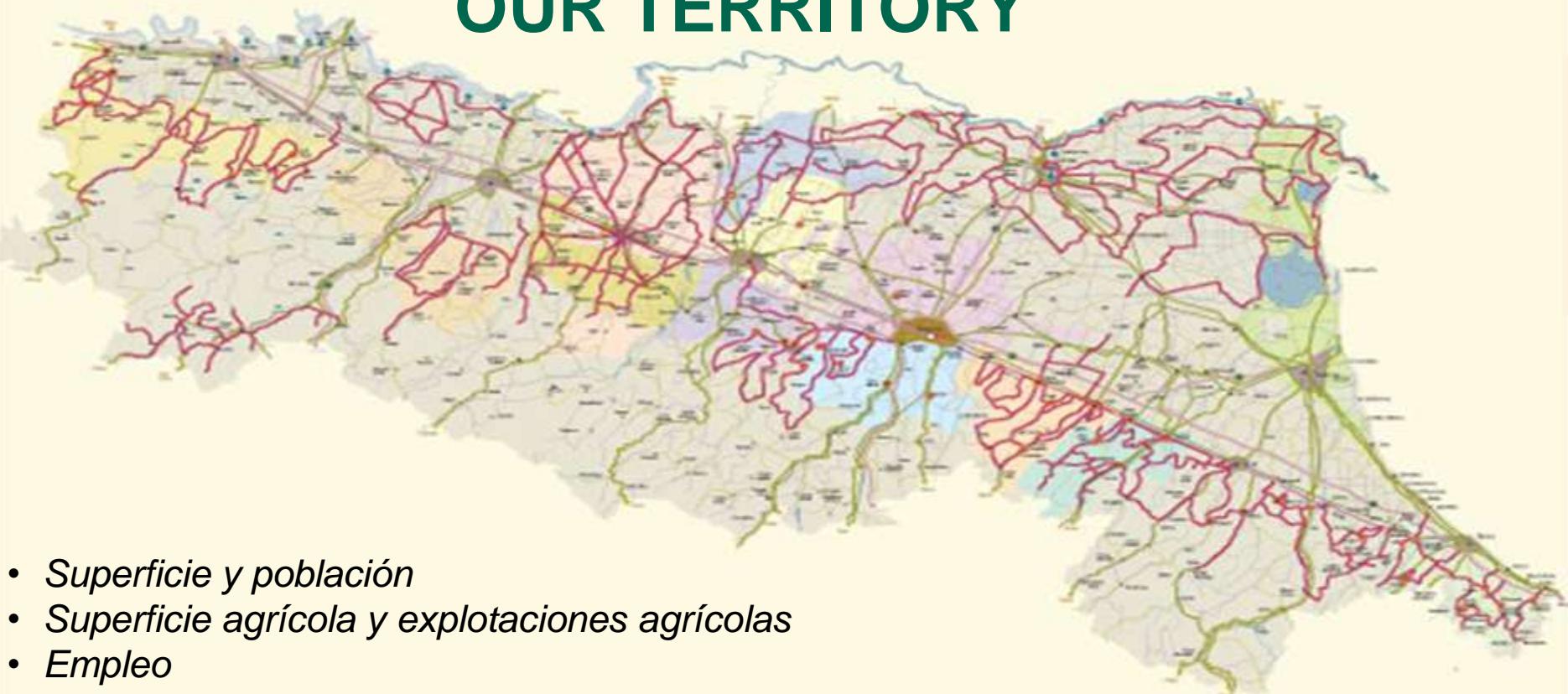
EMILIA-ROMAGNA

Leader for its innovative capacity, quality, safety,
traceability and sustainability of production processes

Main features:

- Territory and agriculture
- The food industry
- Production, intermediate consumption and added value
- Foreign trade and export
- Sustainable agriculture

OUR TERRITORY



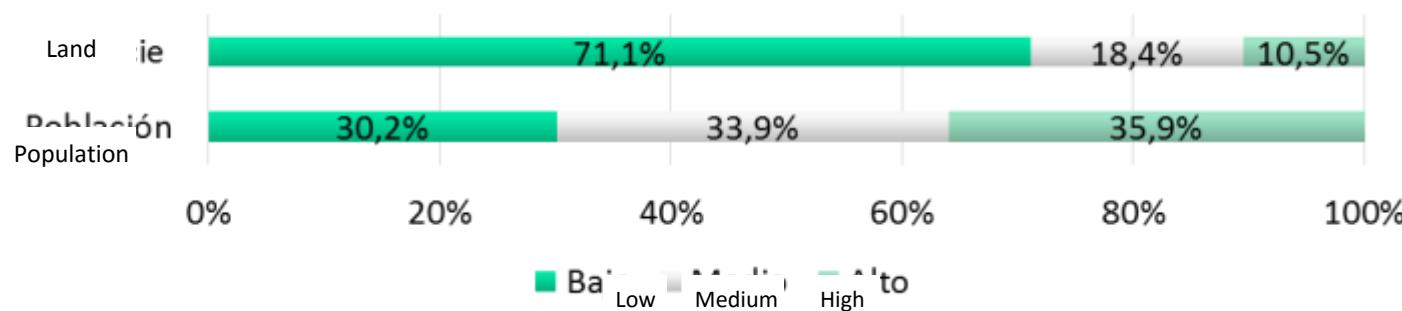
- *Superficie y población*
- *Superficie agrícola y explotaciones agrícolas*
- *Empleo*

Territory and agriculture: land and population

- 4.5 million inhabitants (7.5% of Italy); 22,453 sq. Km land area**
- Density: 198 inhabitants/sq. Km**

	Land area (sq. Km)	% of land	% of Italy	Inhabitants of 2015	% of Inh.	% of Italy	Density (inhabitants/sq. Km)
Emilia-Romagna	22.453	100	7.4	4.447.115	100	7.5	198.5
Mountains	5.677	25.3	5.3	190.108	4.3	2.5	33.5
Hills	6.202	27.6	4.9	1.234.157	27.7	5.3	199
Lowlands	10.573	47.1	15.1	3.032.850	68	10.5	286.8

DEGREE OF URBANIZATION



Source: Istat 2016

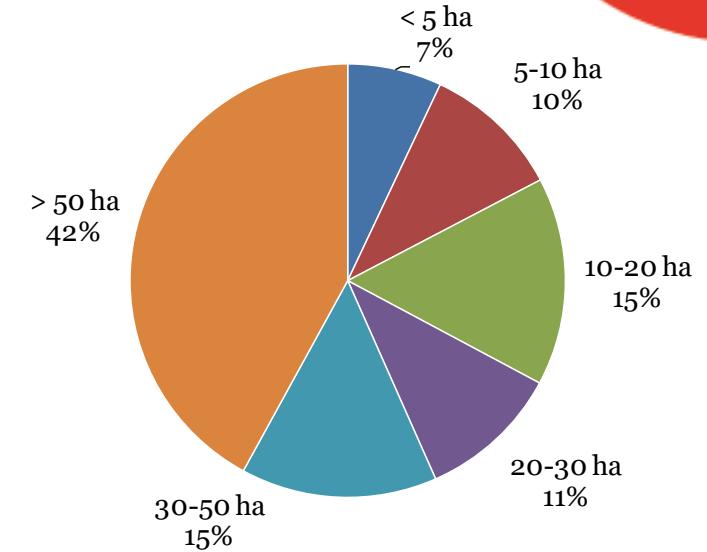
Low degree of urbanization: 71% of land area with 30% of inhabitants

Territory and agriculture: Farms by size of UAA

- More than 50% of UAA is in farms > 30 Hectares UAA
- The UAA concentrated in middle age farmers
- Ongoing generational change (farmers > 65 years are still relevant)
- Growing of joint management of owned and rented land

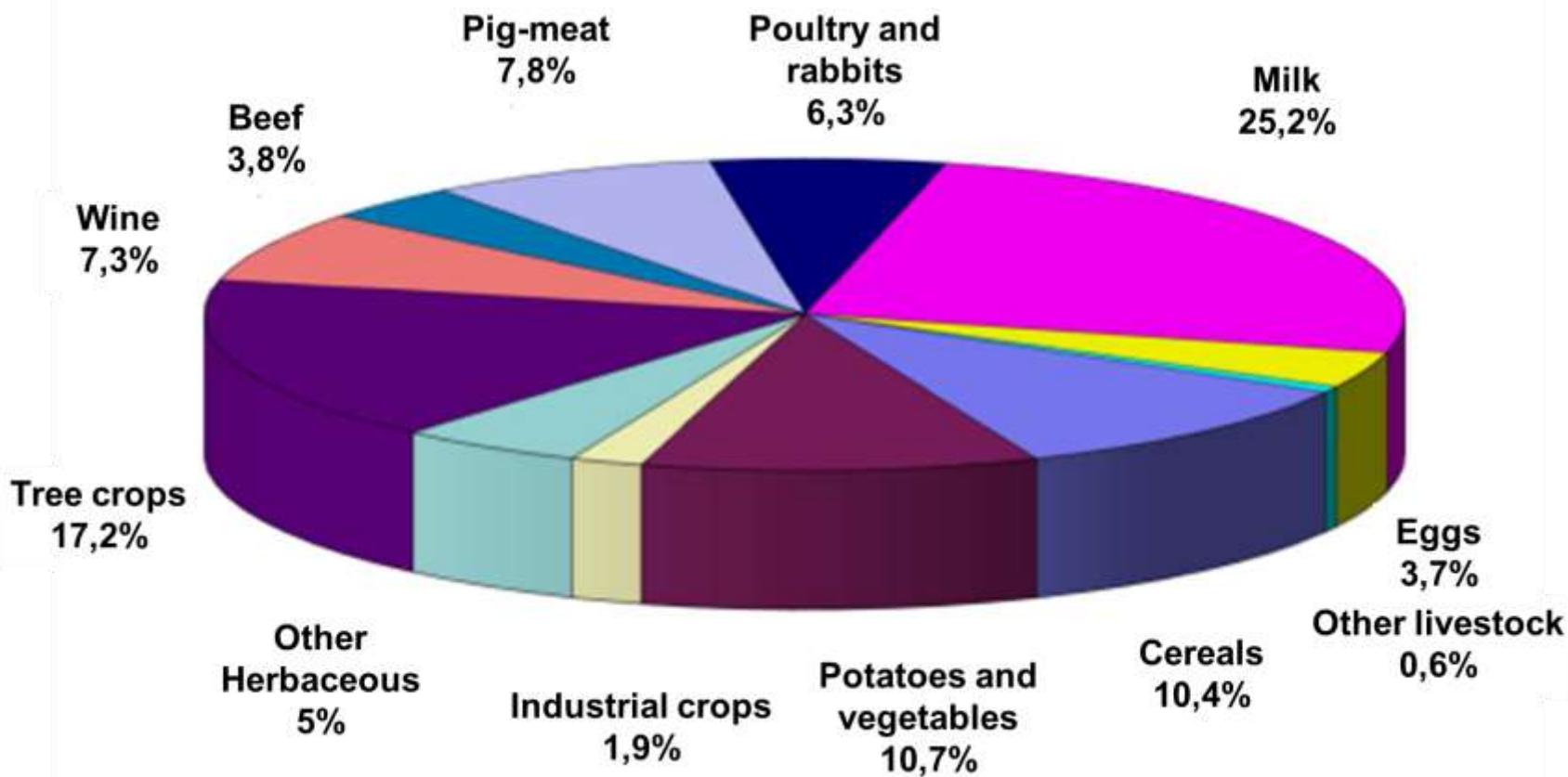
Class of UAA	Emilia-Romagna		% Emilia-Romagna / Italy	
	Farms	UAA (Ha)	Farms	UAA (Ha)
< 5 Ha	33.336	74.631	2.8	4
5-10 Ha	15.539	109.744	8.3	8.5
10-20 Ha	11.807	164.779	9.8	9.9
20-30 Ha	4.628	112.292	9.9	9.9
30-50 Ha	4.093	155.627	10	10
> 50 Ha	4.063	447.140	9.1	8.3
Total	73.466	1.064.214	4.5	8.3

Utilised Agricultural Area (UAA)



Source: Istat – 6° General Agricultural Census

Agriculture: Production outputs by product groups 2016



Foreign trade: Import-Export of Emilia-Romagna

The great importance of agri-food exports and imports is due to its
5.5 billion euros in exports and
6.4 billion in imports

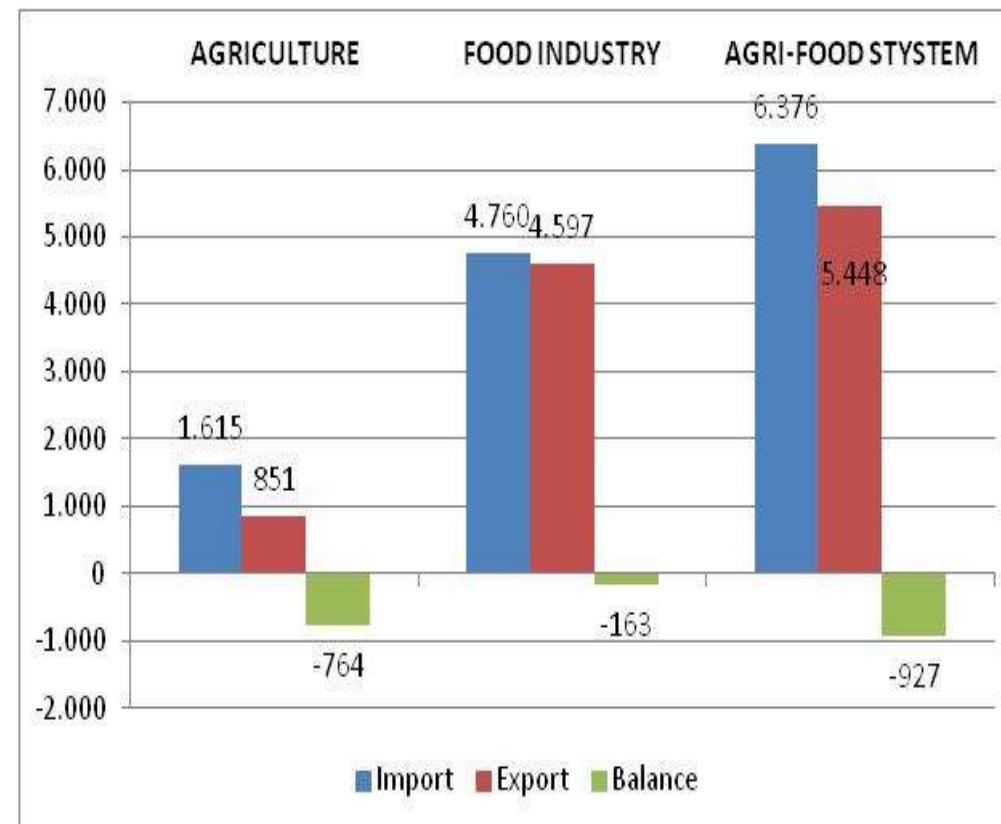
EXPORT 2014

Total Agri-food: € 5.448 million
• Agriculture: € 851 million
• Food Industry: € 4.597 million

IMPORT 2014

Total Agri-food: € 6.376 million
• Agriculture: € 1.615 million
• Food Industry: € 4.760 million

ER: First Italian region in export*
(16% of Italian export)
* Average of 2012-2014



Source: 2014 Report Ch 8.

Foreign trade 2016

Main origins of imports and destinations of exports (% share)

Emilia- Romagna: import and export of agriculture and food and drinks industry (% share)

Import:						Export:					
The main countries of origin						The main countries of destination					
	Agriculture	Food and drinks		Agriculture	Food and drinks		Agriculture	Food and drinks		Agriculture	Food and drinks
	% share			% share			% share			% share	
1	France	15.0	1	Germany	12.0	1	Germany	28.4	1	Germany	17.4
2	USA	9.1	2	Spain	9.2	2	France	9.0	2	France	14.6
3	Netherlands	6.6	3	Netherlands	8.1	3	Netherlands	5.0	3	USA	7.9
4	Brazil	6.1	4	France	6.3	4	Spain	4.6	4	UK	7.3
5	Ukraine	5.7	5	Ukraine	4.8	5	Austria	4.6	5	Spain	4.4
6	Spain	4.9	6	Argentina	4.7	6	UK	4.1	6	Austria	2.8
7	Hungary	4.6	7	Poland	4.3	7	Poland	3.2	7	Netherlands	2.6
8	Bulgaria	4.4	8	Austria	3.5	8	Belgium	2.7	8	Belgium	2.5
9	Germany	4.2				9	Switzerland	2.6	9	Switzerland	2.4

Food Excellences: PDO and GPI product

Emilia-Romagna is the most representative region of Italy by number and value of quality products and geographical indications (PDO and PGI):

- **44 PDO and IGP in 2016**
 - **(first region in Italia and EU)**
 - **6,200 farms interested in PDO & PGI products**



Source: Directorate-General for Agriculture

Food Excellences: PDO and GPI products

How are Safety and Quality monitored?

Through:

- *Rules, standards and disciplinary of production for farmers, processing and seasoning firms.*
- *Controls of standards and quality of food, including traceability with a «filieres approach». 15,000 inspections in 2015*

The 4 main excellences represent 40% of the national turnover of PDO and PGI

Emilia-Romagna	Turnover (Millions of euros)	Relevance %
The 4 best regional PDO-PGI		
Parmigiano-Reggiano (PDO)	1.276	19%
Prosciutto di Parma (PDO)	741	11%
Aceto Balsamico (PGI)	387	6%
Mortadella Bologna (PGI)	230	4%
Total turnover of the 4 (Millions of euros)	2.635	40%
Total Italian turnover (Millions of euros)	6.556	100,0

Source: Ismea-Qualivita Observatory; 2014 Report

BRABANTSE AGROFOOD



Regional Minister Anne-Marie Spierings



Brabant, the Netherlands, Europe

The Netherlands

Population: 16,8 mln

GDP € 603 bln.

41.543 km²

Province of Brabant

Population: 2,5 mln

GDP € 90 bln.

5.082 km²





- 10 percent of economy is agrifood related
- Complete AgriFood value chain present
- Extensive knowledge and education infrastructure
- Strategic location for processing and logistics



University of Applied Sciences
hasdenbosch



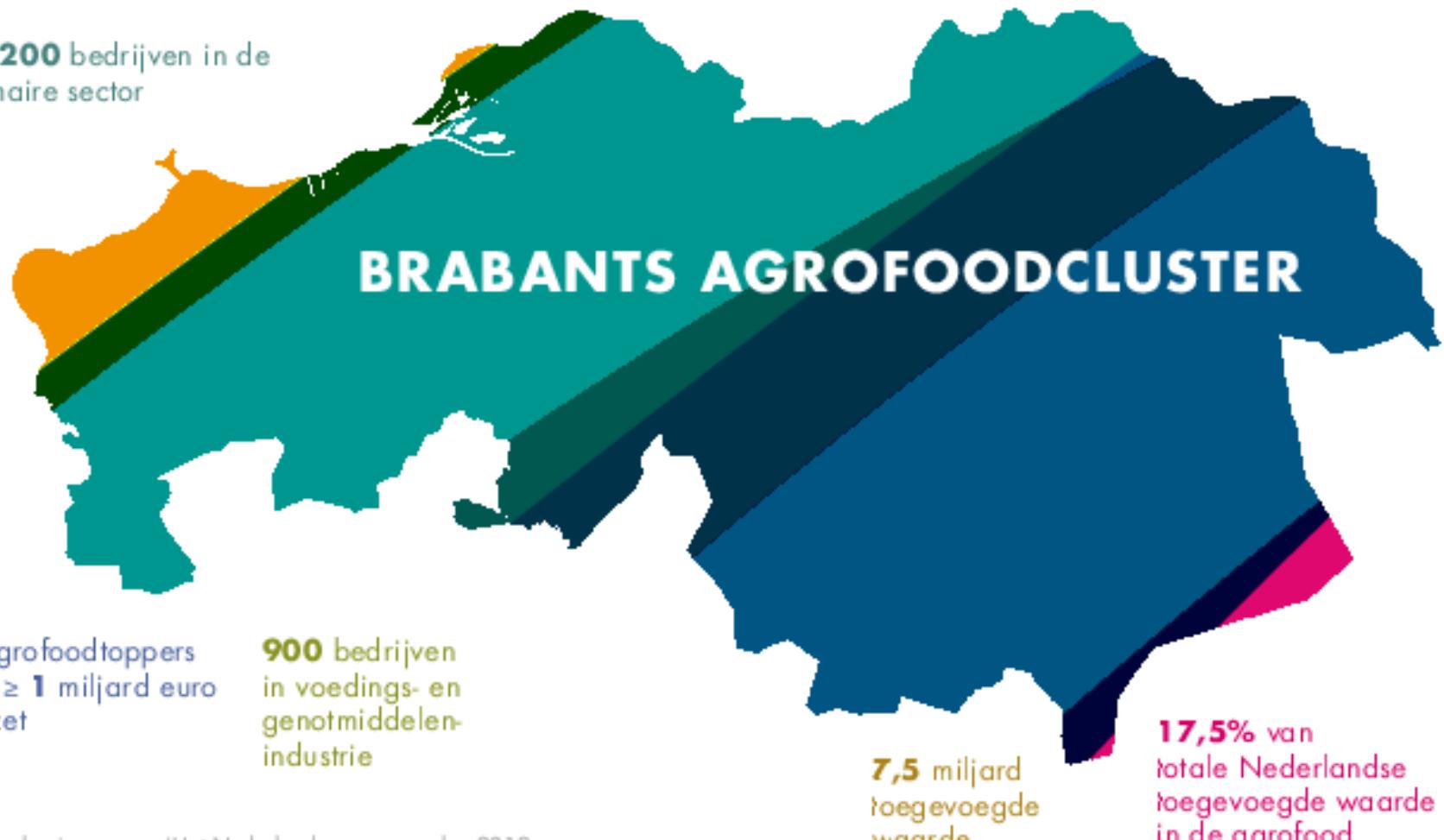
TEEUWISSEN
Everything is valuable



Agri & Food facts

100.000 Fte werkgelegenheid
(incl. buitenlandse grondstoffen)

12.200 bedrijven in de
primaire sector



Redefining Government Engagement

1. Transparent framework of rules and regulations
2. One Health: human and animal health
3. Circular Economy
4. New Business Models and Open Innovation
5. Local Level Community Building
6. Collaborate with new friends in Brabant & in EU



International topcluster looking for cooperation

- World leading in efficient and clean agrofood production
- Complete Agrifood value chain present
- Extensive knowledge and education infrastructure
- Strategic location for processing and logistics
- Looking for cooperation and joint development on:
 - agrifood & high tech systems
 - agrifood & health
 - added value production

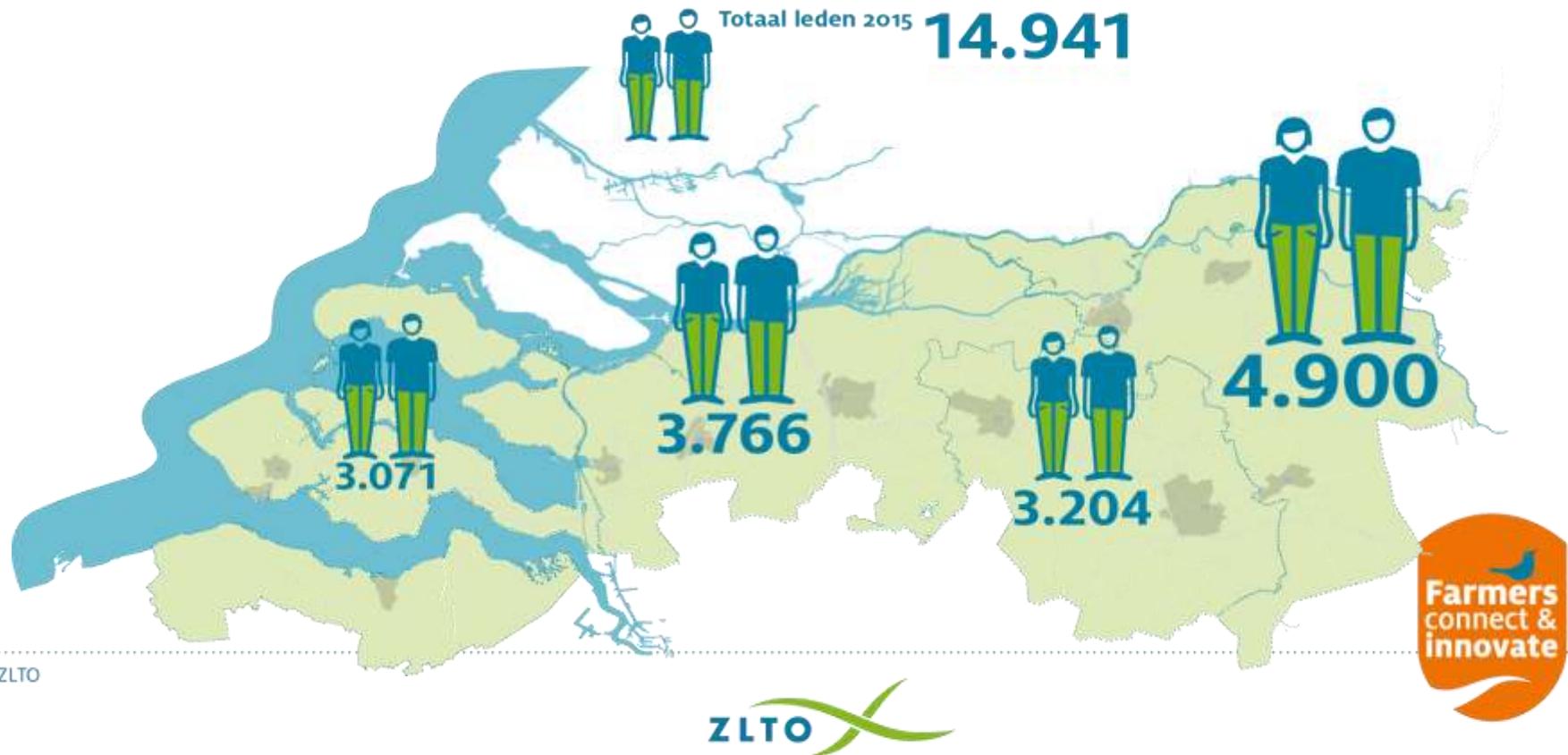


De ZLTO



Hans Huijbers

A farmers association



ZLTO: our region



Agri & food

Nutricia
Sligro
Heineken
Jumbo supermarkten
Heijmans
Masterfoods
Vion
HAS Hogeschool
Friesland Campina
Essent
Unilever
...



Hightech

ASML
Philips
Brainport Region
Eindhoven University of Technology
Royal DSM
NXP
Océ
DAF Trucks
VDL groep
Vanderlande Industries
Fei Company
Sioux Group
Neways Technologies
...



New roles of farmers



Farmers
connect &
innovate

Social farming

Environment

Health

Good food
Green city

Nature

Biodiversity
Landscape
Water quality

Energy

Biomass
Sun
Wind

Stay

Recreation
Relaxation
Leisure

Society

Care

Care farms
garden
Smart food

Education

School children
Employees



Food

Community

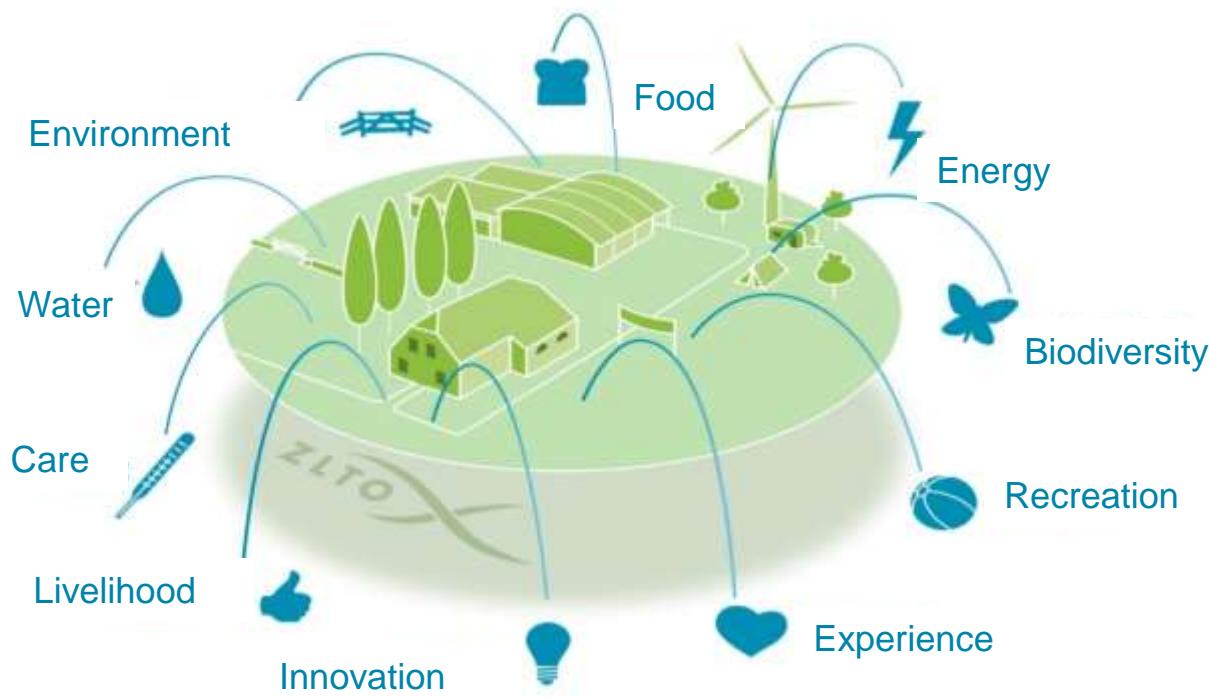
City farming
Freshlabs
Local food

Culture

Design
Livelihood
Coöperation



Farm(ers) services



Meeting:

Regione Emilia-Romagna

Province North Brabant

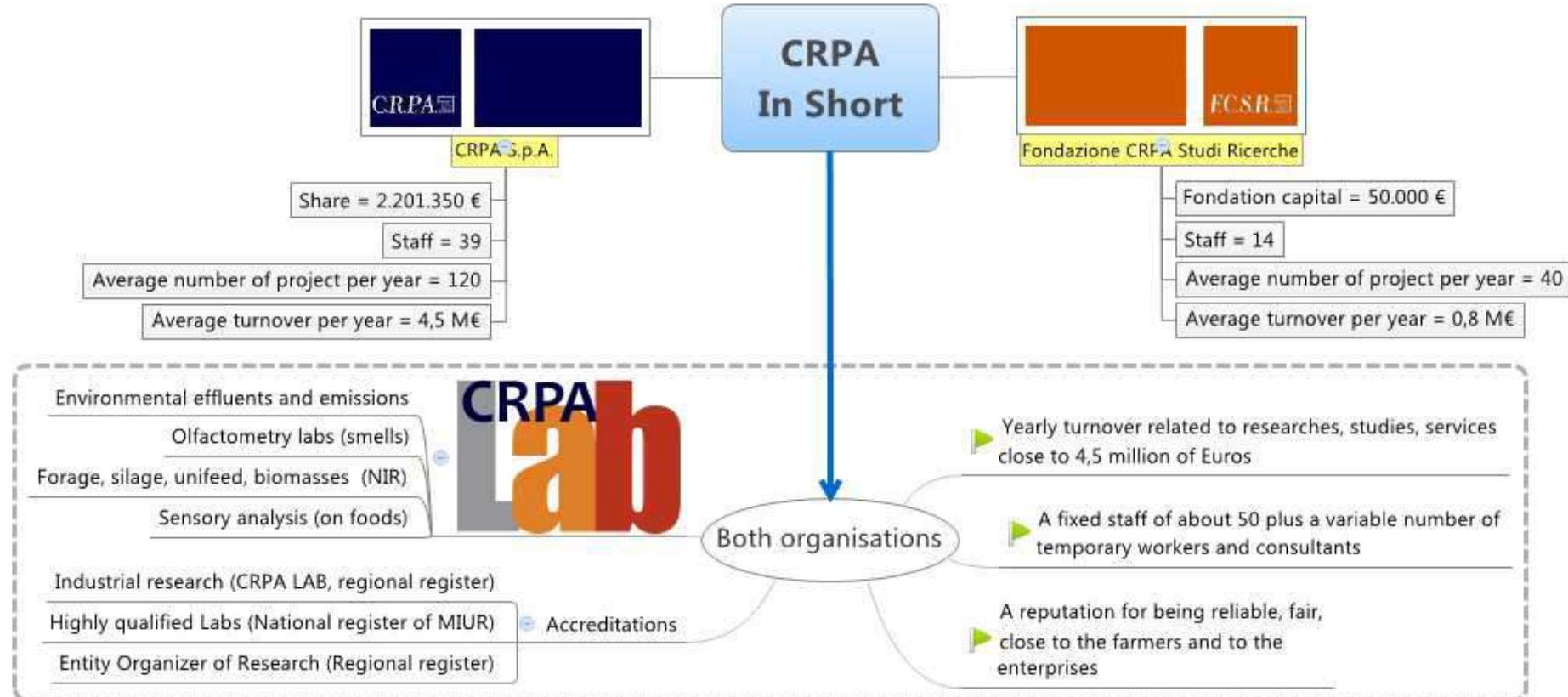
Bologna, 14 Jun 2017

Role of CRPA in the agrofood innovation system

Adelfo Magnavacchi, Managing director

- CRPA is proud for having signed the letter of intent on October 2014
 - Because the cooperation since then has been fruitful
 - Because three funded project and two under evaluation are a little but significant success story
- CRPA is proud to have the opportunity to sign a new letter of intent with the same partners
 - Hoping that this will lead to realize further success stories

CRPA IN A PICTURE



TITLE OF SOME ORGANISATIONAL GROUPS.

Compost barn for dairy cows in the Parmigiano-Reggiano district: an innovative and sustainable housing system and an alternative to cubicles

• **Responsible ham:** Diversification of processed pork based on high standards of animal welfare on pig farms

• **Economic and environmental metabolic model** as a tool for future sustainable dairy farms for Parmigiano Reggiano cheese

• **Agroecological Cover** - Cover crops to increase soil organic matter and reduce weeds

• **Happy milk**, a decision support system to improve the efficiency of dairy farms in the Parmigiano-Reggiano district

- **Improvement of forage systems** in support of the production of pdo parmigiano reggiano cheese "product of the mountain" i/n the valleys of the apennine area of tassobbio river
- **Agroforestry with horticultural crops** - A multifunctional farm for peri-urban areas
- **Innovative integrated system** for use in fertirrigation of the digestate
- **Reduction of the use of antibiotics** in heavy pig farms: productive and qualitative effects (NF)
- **Automatic feeding system in dairy farms** of the Parmigiano-Reggiano district: technoeconomic aspects and application of an innovative prototype

Parma Ham

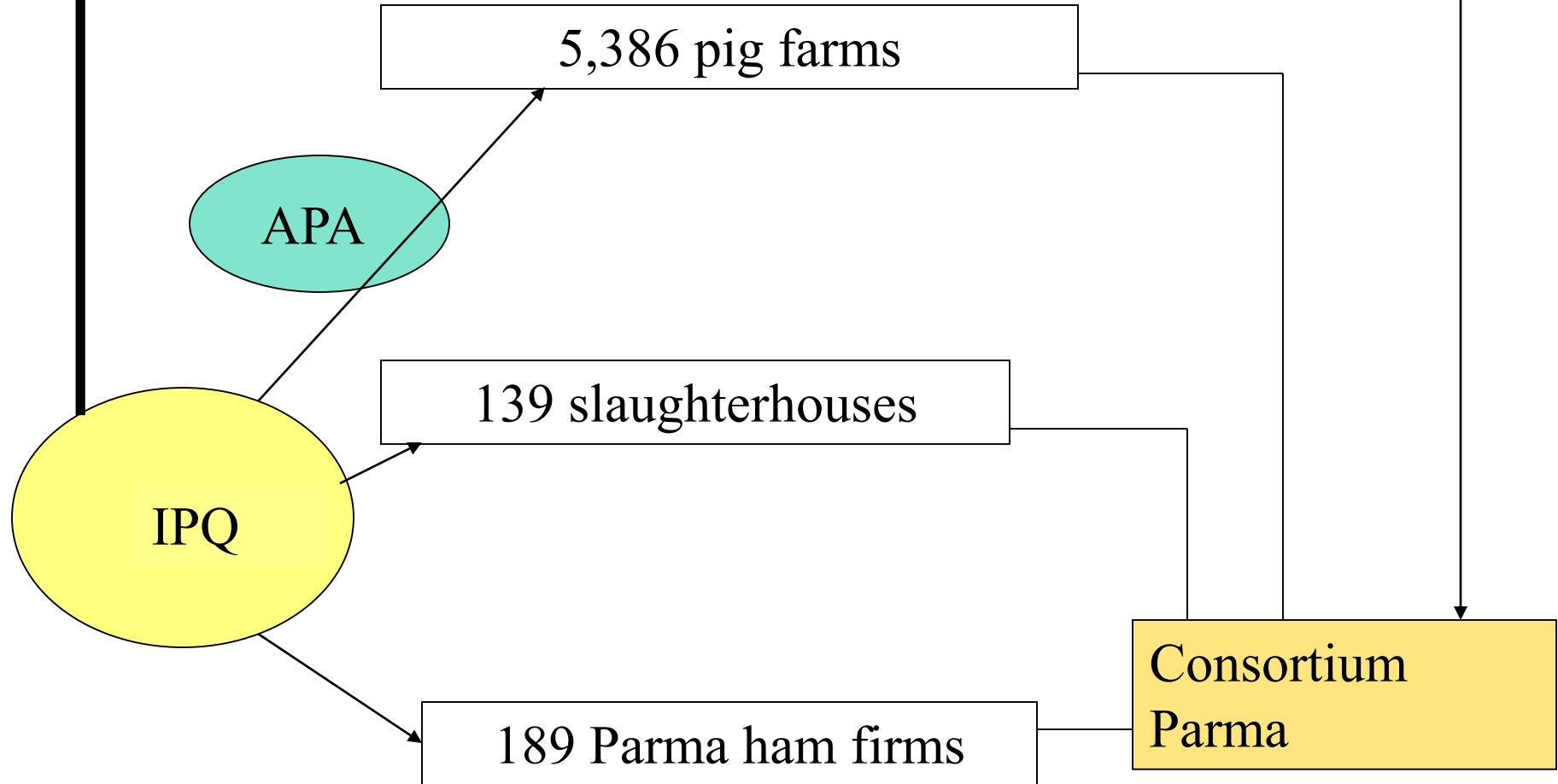


Visit at the Italcarni pig slaughterhouse near Carpi in the province of Modena. This slaughterhouse is managed by the pig producers' organization and cooperative OPAS. This organization of 60 pig farmers represents 10% of the national production of pigmeat for the high quality PDO circuit.

See also www.opas-coop.it/en

Control body

Collective advertising
Research
Brand safeguarding





- **Dei soci OPAS:**

- N. 60 allevatori suini (varkenshouders)
- N. 500.000 suini/anno (DOP Parma e S. Daniele).
- N. 200.000 suini/anno (suino intermedio).
- N. 10 sono grosse aziende (> 10.000 suini/anno)
- N. 40 sono medie aziende (5000/10.000 suini/anno)
- N. 10 sono piccole aziende (< 5.000 suini/anno)

Product specification Parma ham

Pigs raised in 11 regions of Italy

Farms registered and piglets marked within 30 days after birth

Feed regime prescribed: at least 50% cereals, list of prohibited feedstuffs

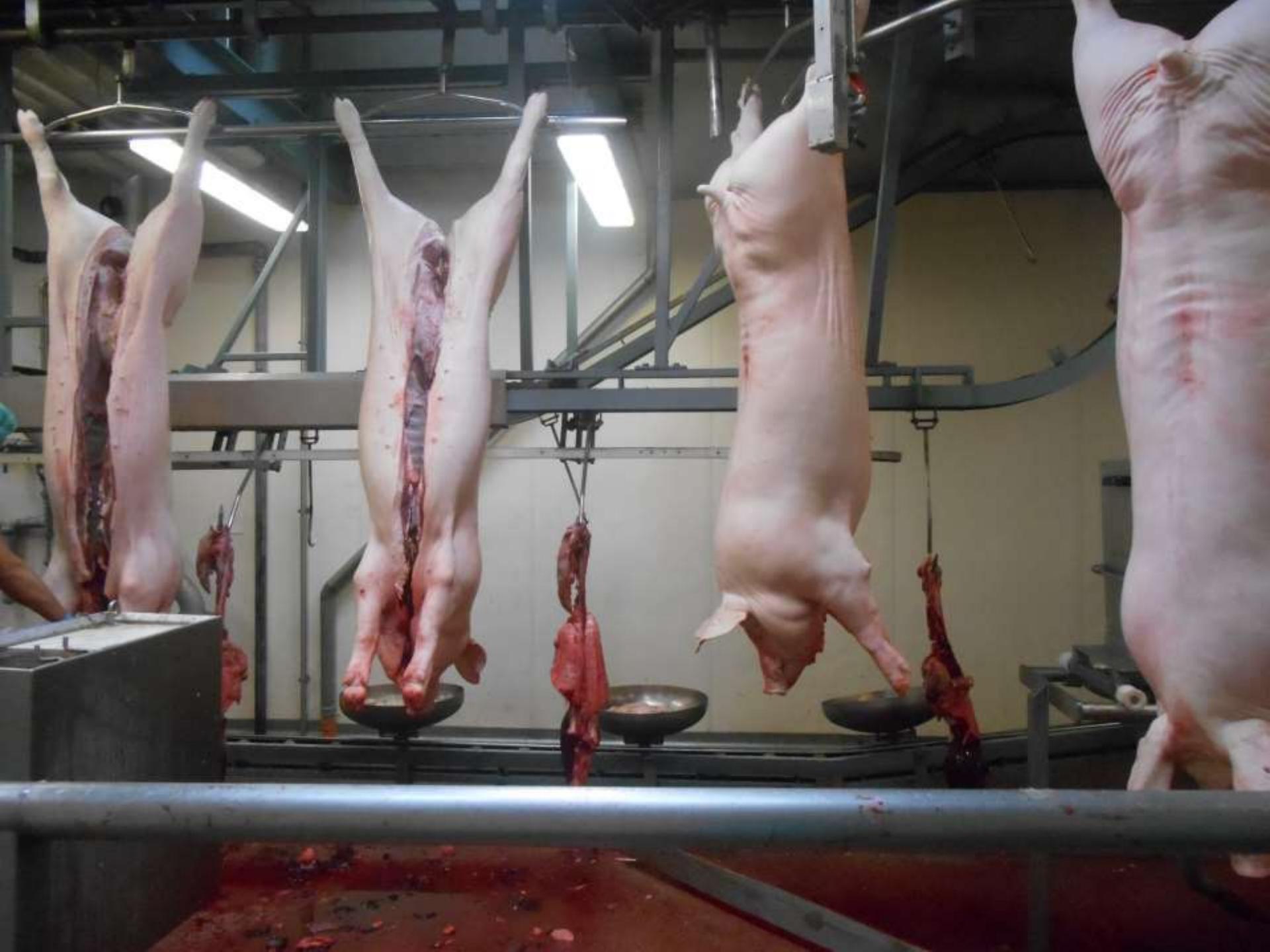
Prohibited pig breeds: New Hampshire, Piétrain, Spotted Poland China

Minimum age of pigs 9 months

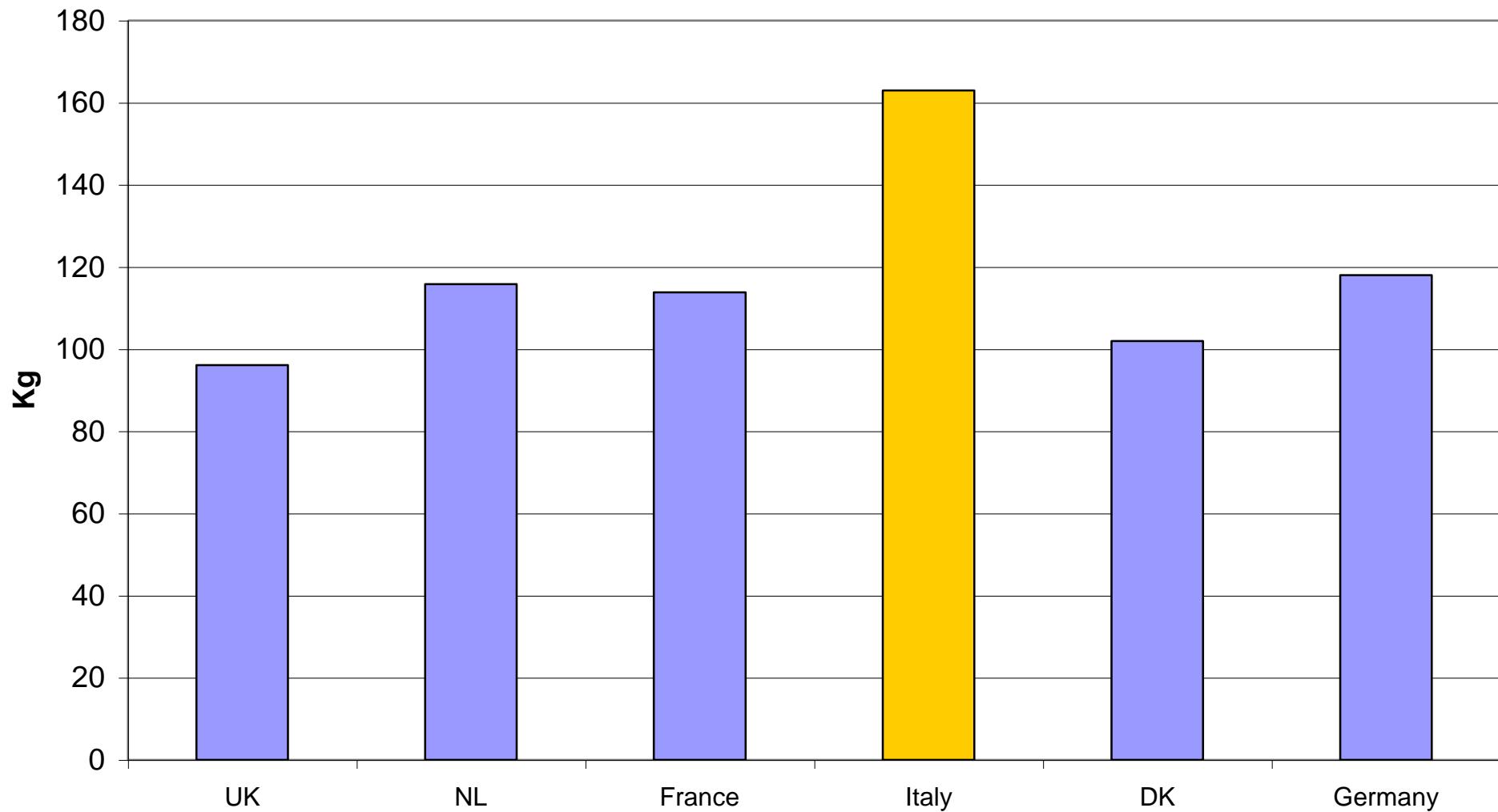
Liveweight at slaughtering between 144 and 176 kg (10% above and below 160 kg)

Minimum curing period of 12 months with minimum end weight 9 kg

Processing firms in hill and mountain area south of Parma: at least 5 km south of the Via Emilia and max. altitude of 900 m a.s.l.



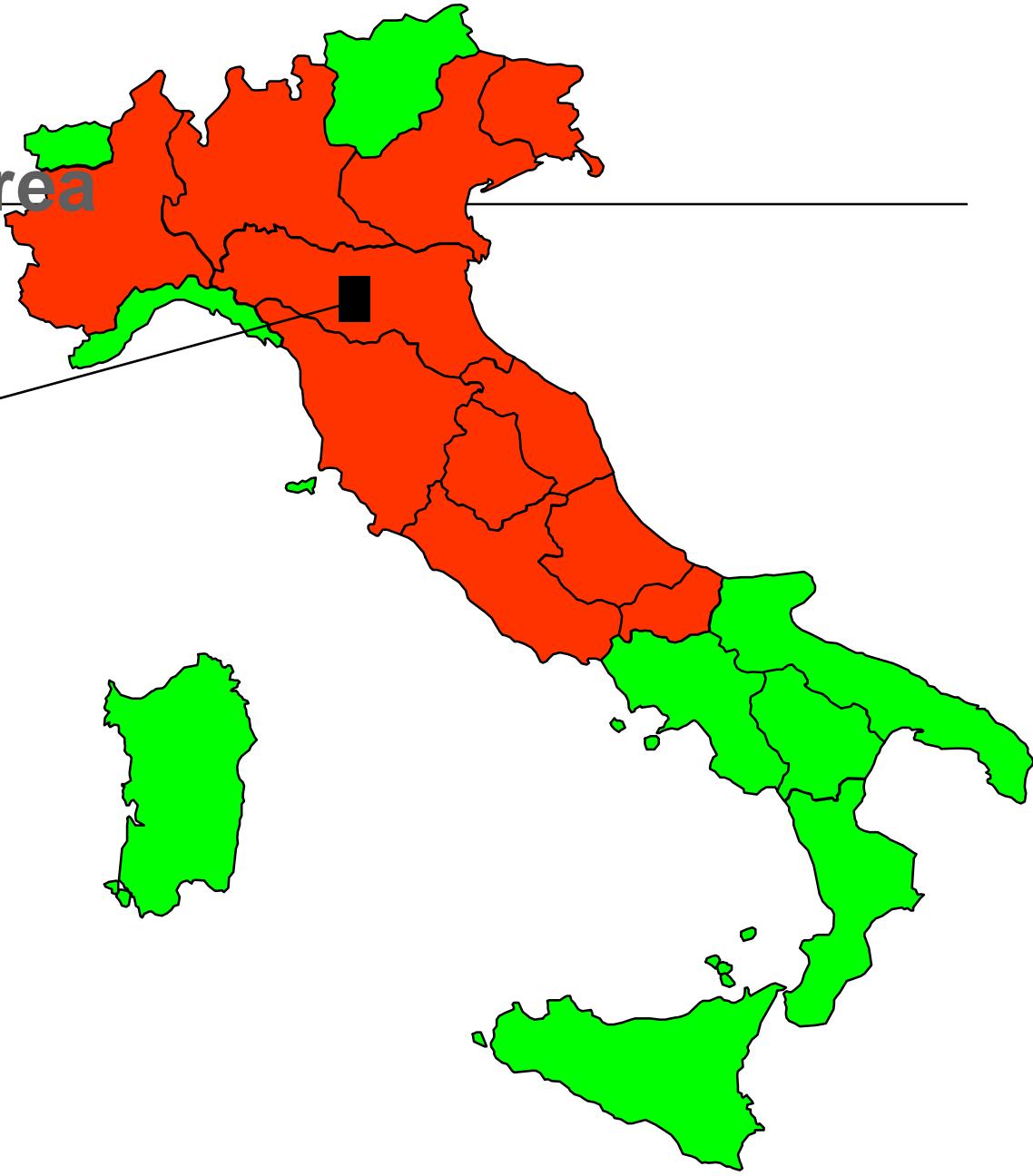
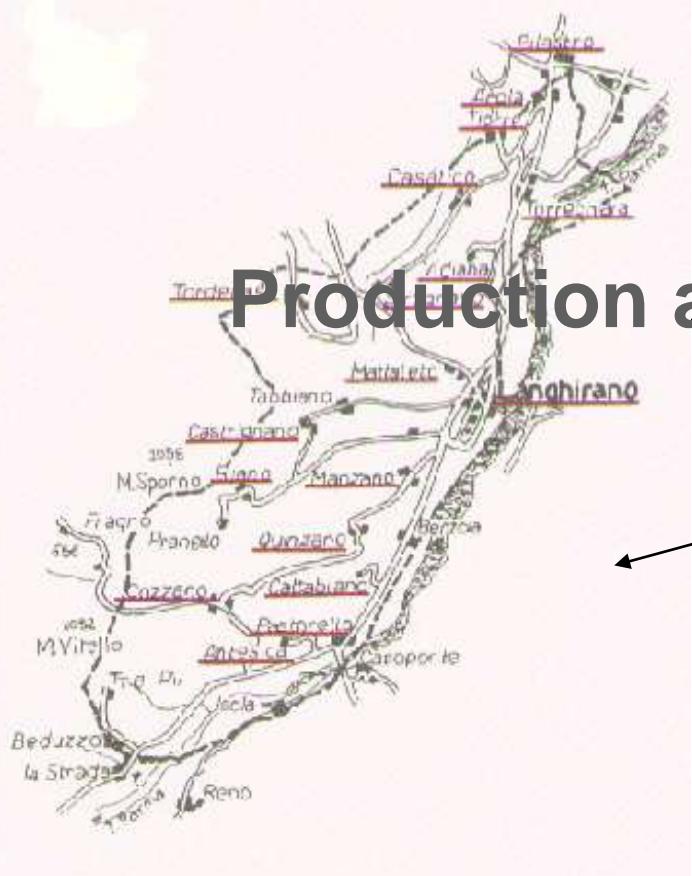
Liveweight at slaughtering







Production area





Production and value of PDOs and PGIs (only meat products)

	number of firms	production tons	turnover	
			wholesale mln €	consumer mln €
Total PDO-PGI	466	185.440	1.580	3.780
Prosciutto di Parma	189	87.922	766	2.089
Prosciutto San Daniele	27	32.779	361	814
Mortadella Bologna	30	34.889	157	314
Bresaola Valtellina	15	8.815	132	220
Speck Alto Adige	30	10.555	84	181
Other Pdo and Pgi	175	10.480	80	162

Source: Ismea

Intermezzo, Spaanse varkenshouderij



1. Germany: 59.263
2. Spain: 47.704
3. France: 23.815
4. Poland: 21.770
5. Denmark: 18.228



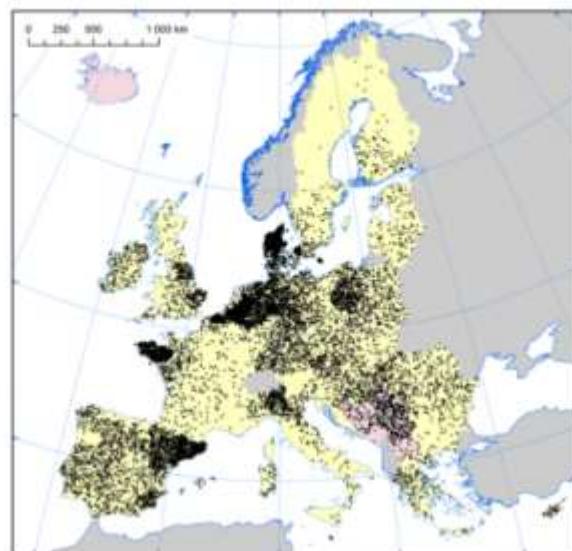
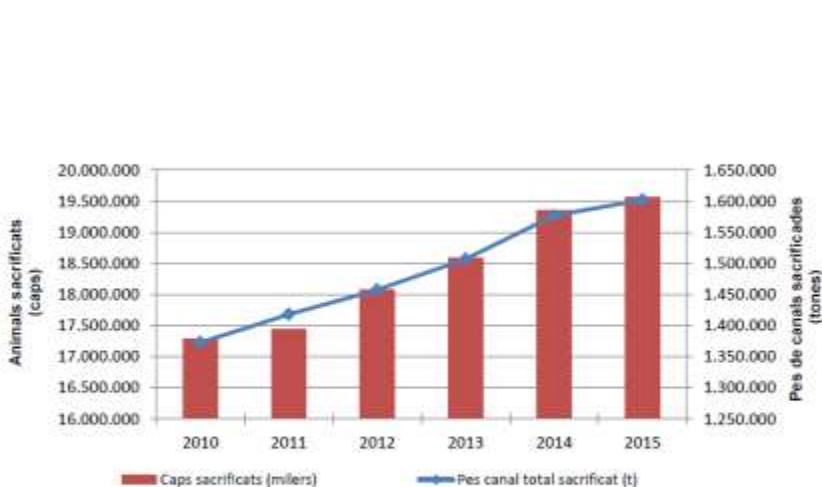
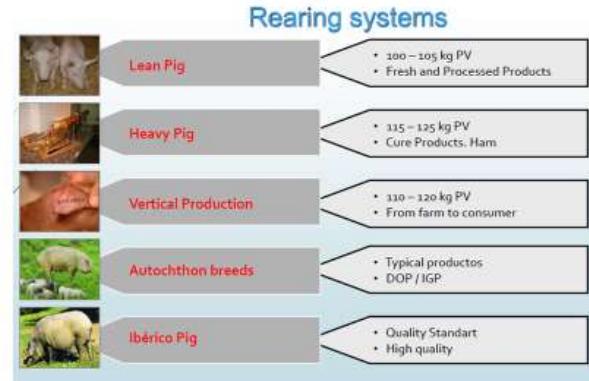
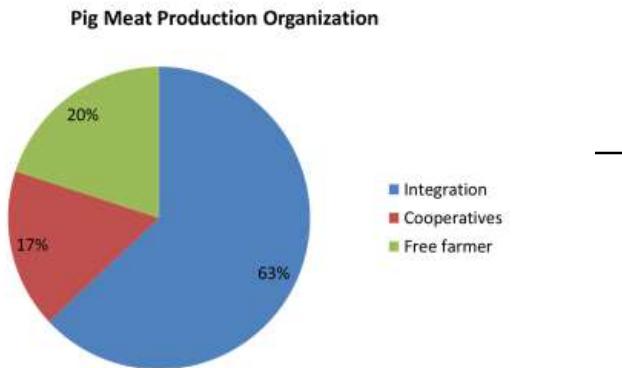
PORCAT: Catalan Pig Producers Association

<http://www.porcat.org>

Slaughtered pigs (x1000)

Source: MAPAMA 2016

Intermezzo, Spaanse varkenshouderij



Galadiner



Parmezaanse Kaas



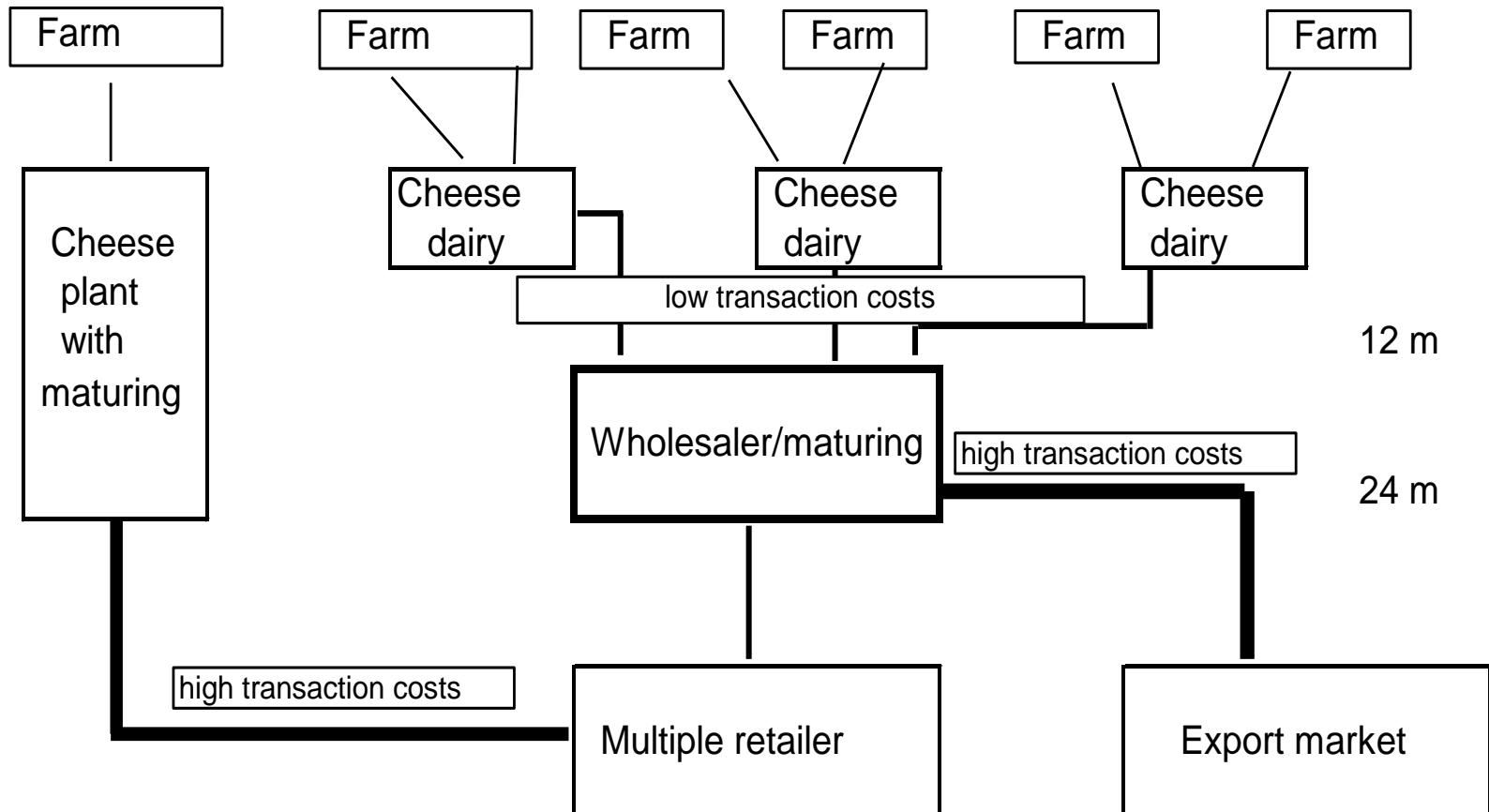
Visit at Parmigiano-Reggiano cheese cooperative
Quattro Madonne
Strada Lesignana 130
41123 LESIGNANA (Modena)
www.caseificio4madonne.it

Product specification of Parmigiano-Reggiano cheese

- Milk only from a delimited area
- Feed regime of cattle does not allow use of silage
- At least 70% of roughage should come from delimited area
- Limited list of concentrates can be used
- Milk cannot be cooled below 18° C
- Only raw milk can be used for processing to cheese
- *Milk is collected twice a day*
- *Cheese is being produced 365 days a year*



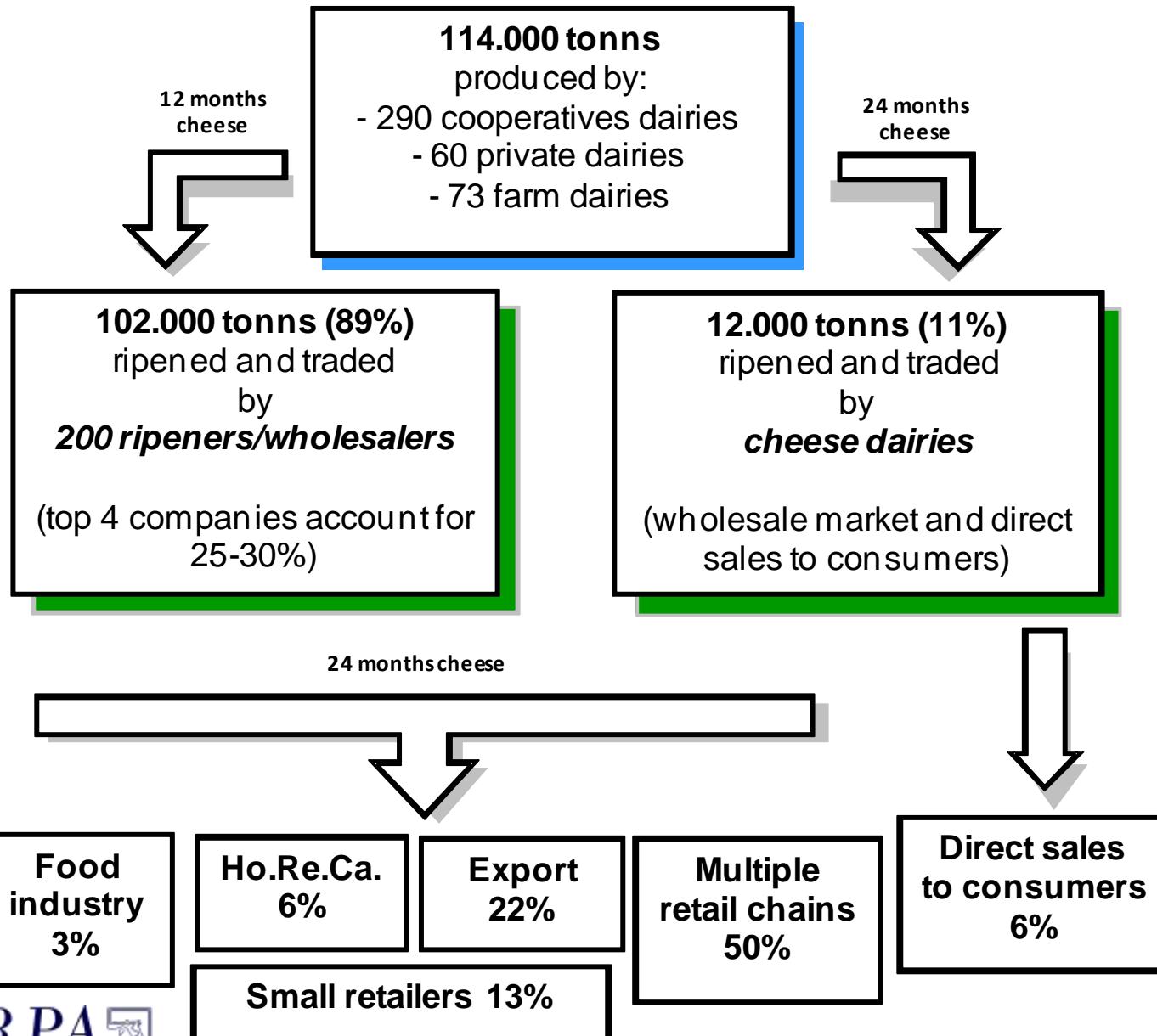
Market relationships in supply chain of Parmesan cheese





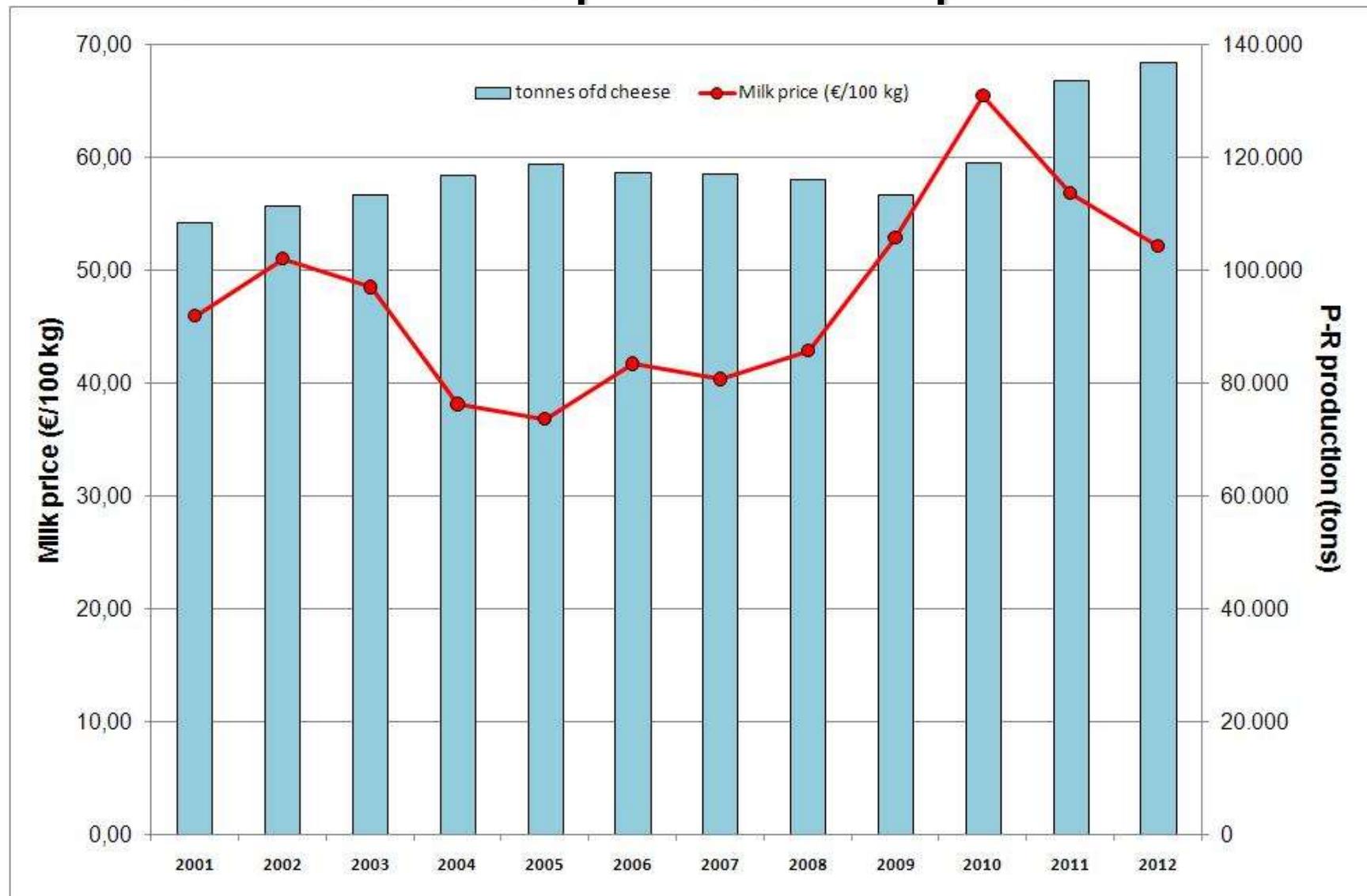


Parmigiano-Reggiano supply chain-2008





Production and price development



Balsamico in Modena

1e bezoek aan bedrijf met productie:

Aceto Balsamico Tradizionale di Modena DOP
(Traditional Balsamic Vinegar of Modena PDO)

Mario Gambliani Zoccoli leidt ons rond.

2^e bezoek aan bedrijf met productie:

Aceto Balsamico di Modena IGP (Balsamic Vinegar
of Modena PGI)

www.monarifederzoni.it





Balsamico in Modena

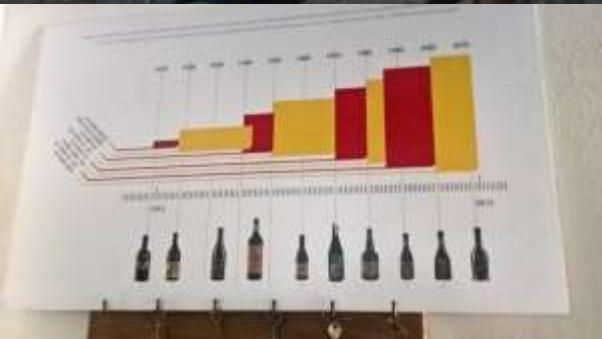
Totale markt is circa 700 miljoen euro. Waarvan de producenten zich voor meer dan 95% bundelen om gezamenlijk ‘marketing’ te bedrijven.

Het 1^e bedrijf is een niche speler met Balsamico tot 700 euro per liter.

Het 2^e bedrijf heeft ongeveer 10% van de markt en is een grote speler met 40 personeelsleden. Maar zoekt het ook in toegevoegde waarde en kwaliteit. Maar levert ook Balsamico van 70 euro per liter.

Beide bedrijven zijn TROTS.





STRING start event

Italië (Emilia Romagna)
Nederland (Noord-Brabant)
Denemarken
Hongarije
Frankrijk
Spanje
Roemenië







Samenwerken In de Toekomst

Eurodairy
EU-Pig
STRING
Studenten uitwisseling
Ondernemers contacten

Provincie Noord-Brabant

Regione Emilia-Romagna



Bologna, 14th June 2017

The Region Emilia Romagna and North-Brabant have similar livestock characteristics, challenges and opportunities. Both regions belong to the EU's top regions for the production of agrifood products. Both regions accommodate high density livestock (pigs, poultry and cattle) and have a great interdependence with agriculture and other functions such as housing, employment, recreation and nature. These characteristics and different EU programs show that there are many opportunities between the two regions for cooperation.

In order to intensify the collaboration between the two regions in the field of 'Agrifood', e.g.: research, technological development and best practice adoption, a delegation of North-Brabant visited Emilia-Romagna October 2014, and a working group was constituted composed of: Region Emilia-Romagna, Province North-Brabant, Stuurgroep LB, ZLTO and CRPAE.

Since 2014 a lot of work has been done and with good results. Therefore a follow-up visit was organized, June 14-16th 2017. The basis of the visit is formed by three networks, that are initiated since the first visit in 2014 with Emilia Romagna, North-Brabant and others:

- EURO DAIRY: Network represented dairy with 14 countries. www.eurodairy.eu
- EU PIG: Network represented pigs with 13 countries. www.eu-pig.eu
- STRING: Network Agrifood Regions represented by 7 countries. [www.interregioneurope.eu/string](http://interregioneurope.eu/string)

The goal of the follow-up visit in June is to go one step further as indicated in our jointly signed Letter Of Intent (LOI) of 2014, and to further deepen the goals we expressed in 2014. In order to underline the shared intentions this new Letter of Intent (LOI-2017) is signed with different objectives:

- To optimally make use of the 3 above networks that were initiated: "strengthening these existing networks around topics as government, business, research and knowledge institutions".
- To further deepen the relation between the two regions by means of connecting and deploying students and by connecting with entrepreneurs/farmers.
- Exchanging knowledge of developments in Emilia Romagna and Province of North-Brabant around agrifood, with focus on 'added-value', and the corresponding approach on capital gains and social acceptance and the role of government.
- And to further explore common areas of interest for new projects and activities around EU-programs.

Regione Emilia-Romagna

Simone Cebell

Provincie Noord-Brabant

Annemarie Splinter

ZLTO

Hans Huijbers

C.R.P.A.E. S.p.A.

Geert Wilms

Samenwerkende projecten

- EURO DAIRY: Network represented dairy with 14 countries. www.eurodairy.eu
- EU PIG: Network represented pigs with 13 countries. www.eupig.eu
- STRING. Network Agrifood Regions represented by seven countries. www.interregeurope.eu/string





Evaluatie bijeenkomst

LOCATIE: VION Food Boxtel
Woensdag 15 November, vanaf 18.00
uur tot 21.30 uur.

Programma:

- Rondleiding
- Hapje eten
- Terugkijken
- Vooruitkijken