



EU-MERCI workshop

“Introductory speech”

Rimini Ecomondo, 8th November 2017

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FEDERALIMENTARE
SPES GEIE



FEDERALIMENTARE PROFILE

FEDERALIMENTARE is the Italian Food & Drink Industry Federation, established in **1983** and member of **Confindustria** (General Confederation of the Italian Industry) and **FoodDrink Europe** – the European Confederation of food and drink Industry.

MISSION

- promote the image of the Italian food sector;
- pursue the competitiveness of the Italian F&D Industry;
- consolidate the activities of Italian companies in international markets;
- create new business opportunities for companies both in domestic market and abroad;
- support food quality and safety, correct lifestyles and innovation.

Through its 15 branch Associations FEDERALIMENTARE represents 6.850 companies belonging to every sector of F&D Industry.

1. **AIDEPI**
pasta, sweets, bakery and confectionary
2. **AIIPA**
frozen, baby foods, dietetic products, spices
3. **ANCIT**
canned fish
4. **ANICAV**
preserved vegetables
5. **ASSALZOO**
animal feed
6. **ASSICA**
cured and processed meat
7. **ASSITOL**
olive oil, seeds oil and margarine
1. **ASSOBIBE**
2. **soft drinks**

9. **ASSOBIRRA**
beer and malt
10. **ASSOCARNI**
fresh meat
11. **ASSOLATTE**
milk and dairy products
12. **FEDERVINI**
wine, vinegar. spirits
13. **ITALMOPA**
flours, based flour mixes
14. **MINERACQUA**
mineral natural water
15. **UNIONZUCCHERO**
sugar

FACTS & FIGURES: OUTLOOK 2016

The Italian F&D sector remains the second national manufacturing sector after the mechanic one:
12% of employment, 11% of value added and 8% of exports

Turnover
€132 bln

VALUE ADDED
25 bln



Employment
385.000 workers
(850.000 including agriculture)

BUSINESSES
58.000
(12% with more than 9 employees)

Consumption*
230 bln

EXPORT
30 bln

Sustainable food chain development: our commitment on 4 strategic areas

1. Prevention from generation of food losses and food waste.

By-products are valorised for a variety of purposes:

Production of animal fodder (each year, around 85 million tonnes are used to make fodder in the EU);
Production of bioenergy forms;
Production of food ingredients,
Cosmetic and pharmaceutical industry;
Production of fertilisers.



2. The amount of water used in production processes has been halved, improving efficiency without compromising the strict hygiene standards imposed by the EU.

- The water consumed by the food industry fell by around 30-40% between the Nineties and today



3. Energy efficiency has been pursued (-20% in 10 years) as a crucial force for driving industrial competitiveness, but also -and above all- as a factor for reducing greenhouse gases (-30%).

The consumption of electricity which can be attributed to the sector totals around 8% of electricity used for industrial purposes in OECD Countries and 1.5% of overall energy consumed in Europe, whilst the CO2 emissions attributed to the food Industry are estimated at around 1.5% of total greenhouse gas emissions in the EU 15.



3. Packaging has been optimised, cutting amounts of raw materials used (- 40% in 10 years).

- The food Industry alone uses 2/3 of product packaging, and dedicates considerable resources to preventing and reducing the environmental impact of packaging.
- It is dedicated to reducing the materials used for packaging, without sacrificing either the needs of consumers or the integrity, quality or safety of the products.



**“Energy efficiency
as driver for the competitiveness
of the Italian agri-food industry”**

EFFICIENT USE OF THE BASIC INPUTS: *ENERGY*

the scenario



As a global outlook, over the next twenty years the current energetic market structure will undergo a deep change (*Study “BP Energy Outlook 2030” on the energy requirements*):

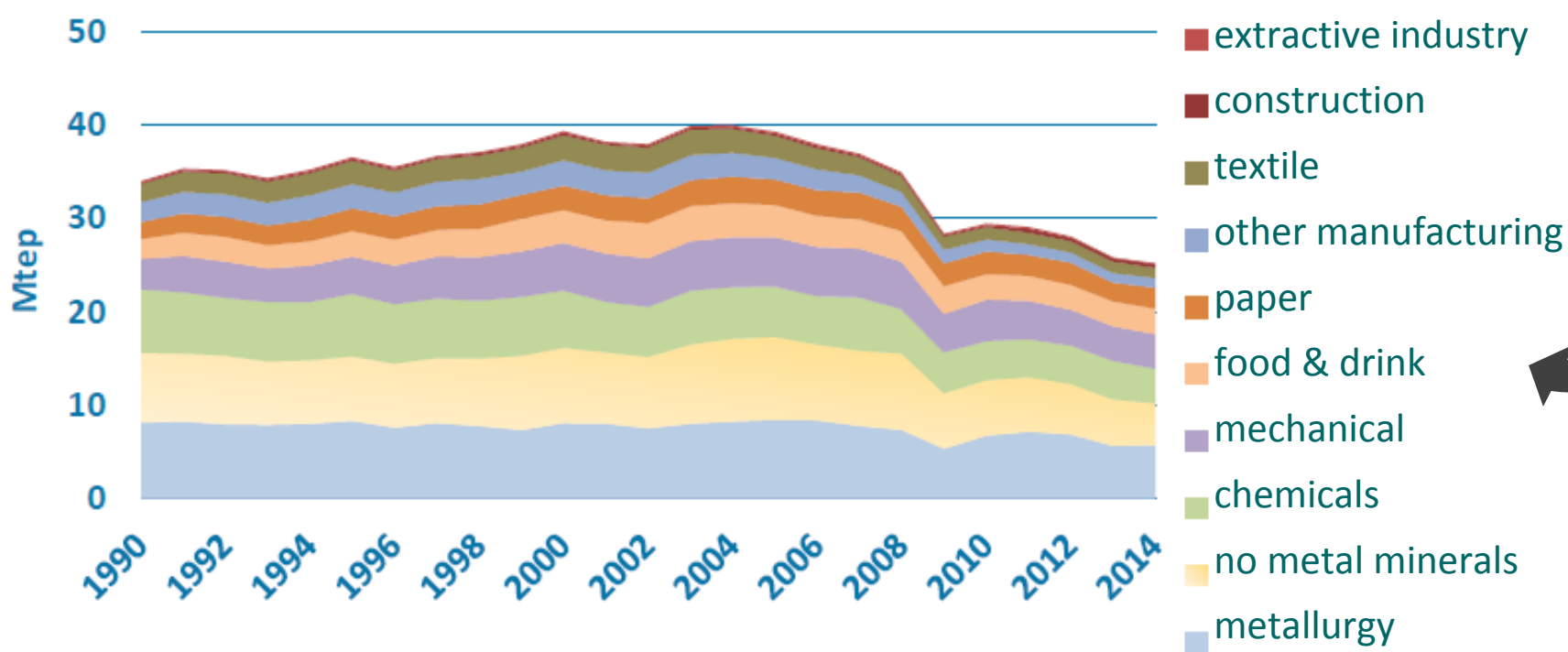
- **+40%** world energy demand
- the energy intensity and diversification of energy sources (with an increase (until 2030) - **from 5% to 18%** - of the contribution from renewable energies)

In this frame, European Commission (EU Plan of Action on the energy efficiency) considers the energy efficiency as:

- the **main tool of CO₂ emissions reduction**
- an opportunity to **increase the competitiveness**

TREND IN FINAL ENERGY CONSUMPTION IN INDUSTRY BY SECTOR

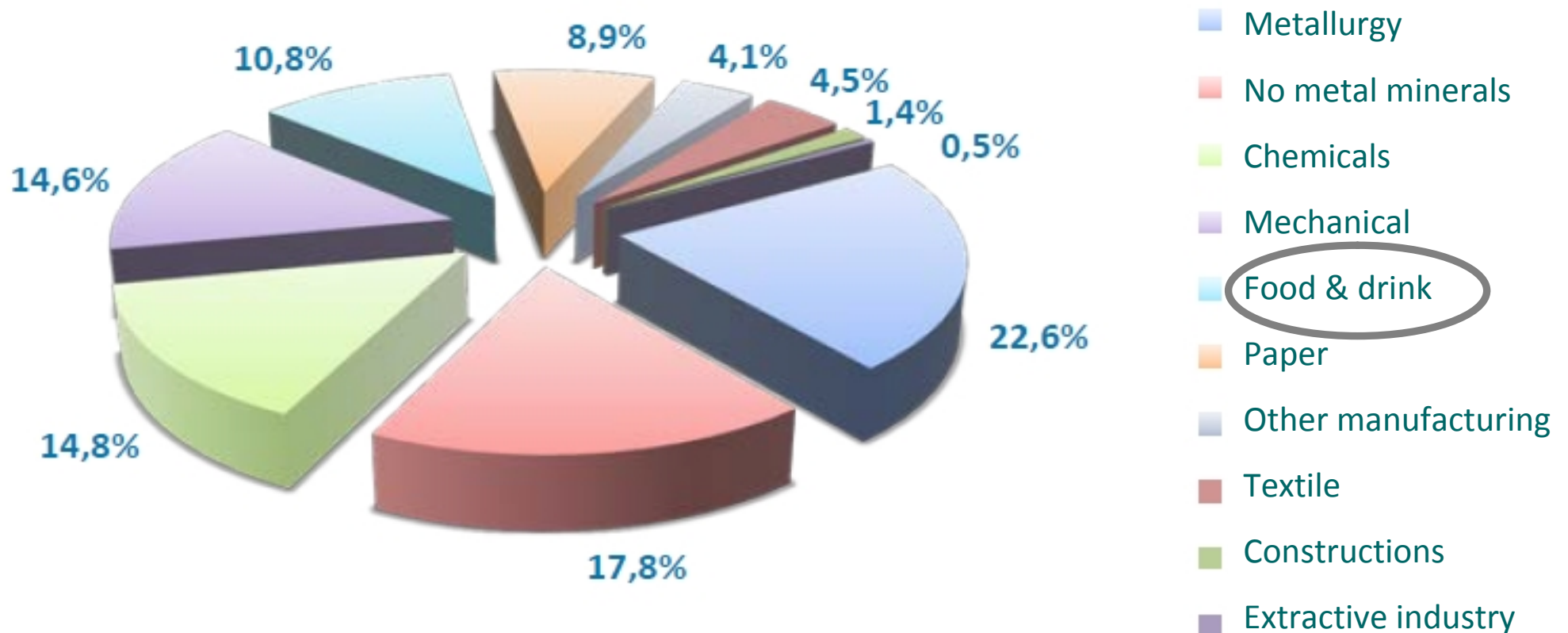
The analysis of the trend in final energy consumption in the Italian industry sectors during the period 1992-2014 registered a growth until 2003, then a decrease for all the sectors, including those more energy intensive as well as the less energy intensive such as the agri-food (-29%)



Energy consumption: *positioning of the food industry sector*

The energy intensive sectors accounted about 2/3 of the total industry consumption (60%). Food industry registered a consumption share equal to 10,8% on the total.

Source: Annual Report on Energy Efficiency RAEE 2016, ENEA





Energy efficiency

in the *Food & Drink Industry: main features*

- ✓ Food & Drink industry – except some *energy intensive sectors* – has environmental impacts relatively low in terms of energy consumption and GHG emissions
- ✓ At the same time, energy is one of the main inputs both in the food processing lines and in the agricultural raw materials production
- ✓ The Food industry is suffering higher cost of domestic energy bills than those of major competitors
- ✓ Also in the food & drink industry the good exploitation of potential energy savings combines the environmental targets and the economic sustainability with the mission to reduce the impact of the food-chain

The importance of Energy Efficiency: benefits

- Reduces energy related production costs.
- Improves competitiveness and profitability.
- Manages risk exposure to energy prices and security of supply.
- Reduces company greenhouse gas emissions.
- Improves environmental footprint and public image of the company in a cost effective way.



The «culture» of the energy efficiency and the barriers

Obstacles to the EE approach could be:

- ✓ *Lack of knowledge* of the opportunities and already existing tools
- ✓ *Failure of perception* of the EE actions as a priority
- ✓ “*distrust*” with respect to the plurality of technical options
- ✓ *Resistance* to make investments of which there is no immediate perception of their concrete return

Useful initiatives to overcome such bottlenecks:

- ✓ To draw Guidelines for the evaluation and the monitoring of the results (benefits) achieved
- ✓ To promote *energy audits* as useful tool (also on a voluntary basis) to realize the *diagnosis* and the planning of the measures
- ✓ *spread* the knowledge on EE (information/experience)

Energy efficiency: the actions of the Food Industry



The fields of action to increase the energy efficiency concern:

- ✓ diffusion of BAT on the management of energy resources;
- ✓ participation in national energy efficiency schemes;
- ✓ evaluation of co-generation, tri-generation and poly-generation potential ;
- ✓ moving to refrigeration technologies less harmful to the ozone;
- ✓ diversification of the energy mix with the use of the renewable energies, in order to increase the share of self-produced energy, mainly from biomasses and bioliquids of animal and vegetal origin.



**CL.USTER A.GRIFOOD
N.AZIONALE
CL.A.N.**

PROFILE

It is an **industry – led and multi-stakeholder Association** established in **2013** and based in Federalimentare premises. It groups **key national players of the agrifood chain**: companies, associations, research centers, universities, local administrations (Regions) representatives. **It is now turning into a legal recognized entity.**

MISSION

1. **aggregation and coordination** of food stakeholders;
2. **integration** between regional, national and EU policies on research and innovation;
3. **advisory** to policy makers to identify priority investment lines for industrial food research;
4. establishment of **ad hoc partnerships** for the development of industrial research projects;
5. **internationalization** of food research and innovation;
6. **dissemination and communication.**

MISSION 3.1 Advisory - focus on the Roadmap

Cluster CL.A.N. developed a **Roadmap for Innovation and Research** - a shared strategic vision of prospective technology scenarios in the Food Industry structured in the following 6 strategic areas:

1. **Health and well-being**
2. **Food safety**
3. **Production processes for improved food quality**
4. **Sustainable and competitive food production**
5. **Machinery for the food industry**
6. **ICT in the agrifood industry and technology transfer tools**





**Thank you
for your kind attention**