Ricerca, Innovazione, Competitività:
le sfide dell'Industria Alimentare Italiana al 2020
Presentazione della Piattaforma Tecnologica Nazionale
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LUISS, SALA COLONNE, VIALE POLA 12 – ROMA

Italian Technology Platform on "Italian Food for Life"

The Vision for 2020 and beyond

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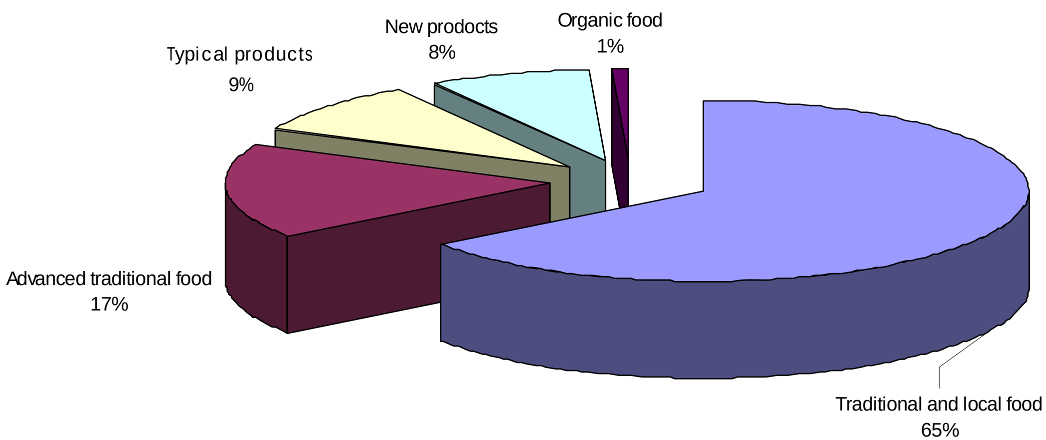
Director General of Federalimentare

TOTAL TURNOVER BY PRODUCT AND R&D (2005)

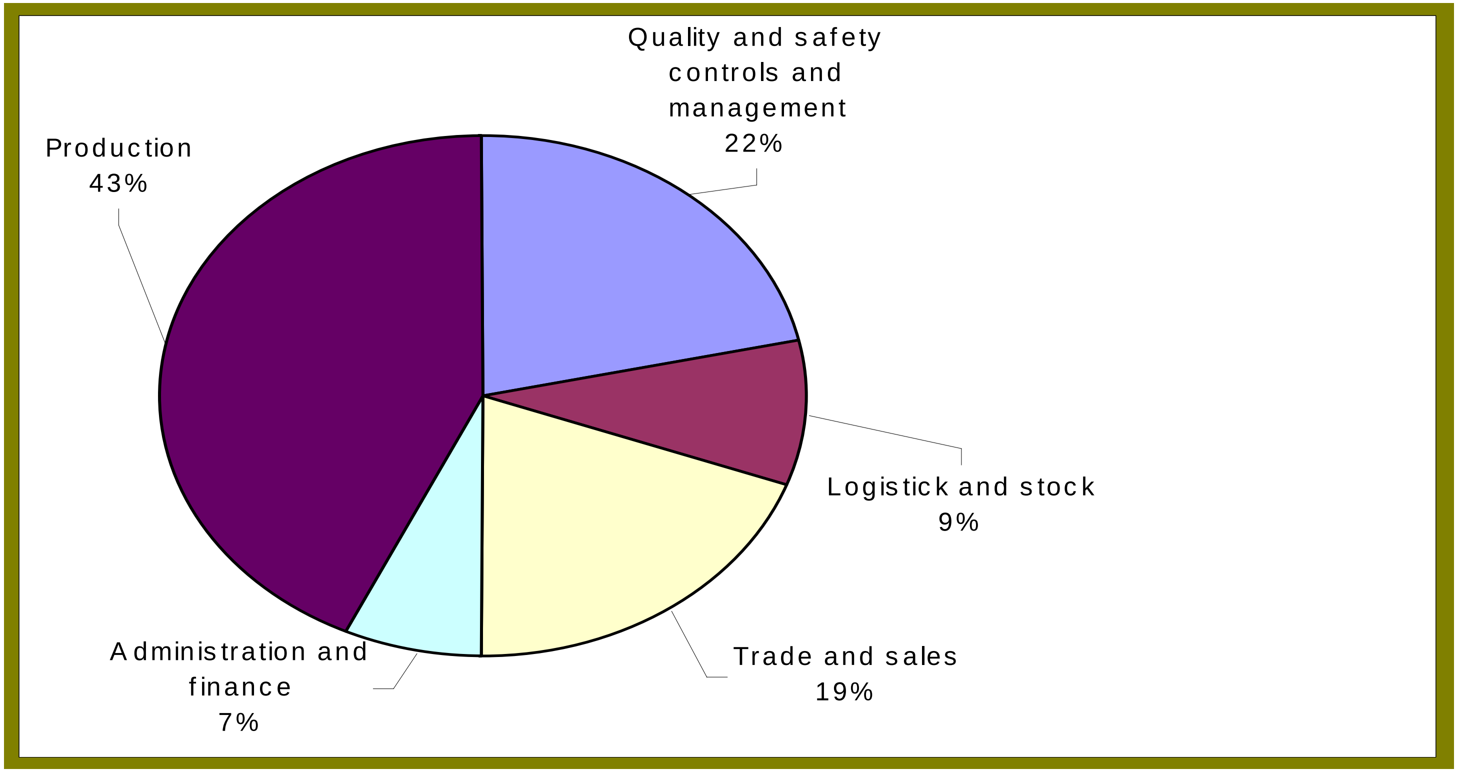
Traditional and local food	70	65%	
Advanced traditional food	18	17%	
Typical products (PDO, PGI and wine)	9,5	9%	(of which 2,9 billion € of export)
New products (novel, functional, healthy, ready to eat, etc.)	8,5	8%	
Organic food	1	1%	
Total	**107**	**100%**	(of which 15 billion € of export)



Source: Centro Studi Federalimentare 2005

TOTAL DIRECT EMPLOYMENT OF THE ITALIAN F&D INDUSTRY (2005)

Quality and safety controls and management	85.800
Logistic and stock	35.100
Trade and sales	74.100
Administration and finance	27.300
Production	167.700
Total	**390.000**

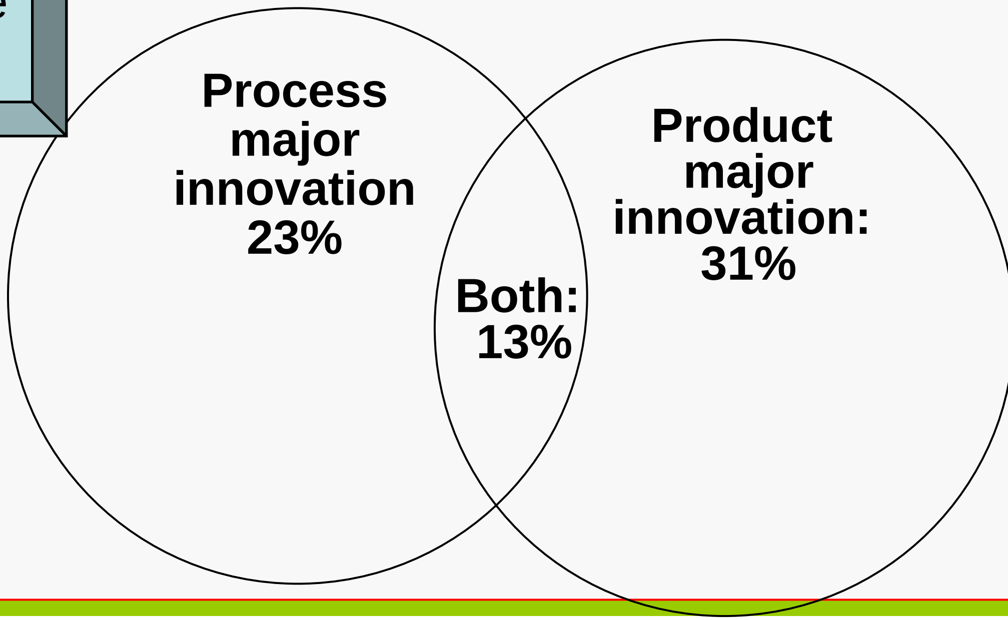


Source: Centro Studi Federalimentare 2005

Innovators groups

Europe

Major innovators: 41%



Improvers who did not introduced major innovations: 44%

Only 15% of all F&D firms did not introduce innovations in the last three years

Innovators groups

Italy

Major innovators: 34%

Process major innovation 20%

Both: 12%

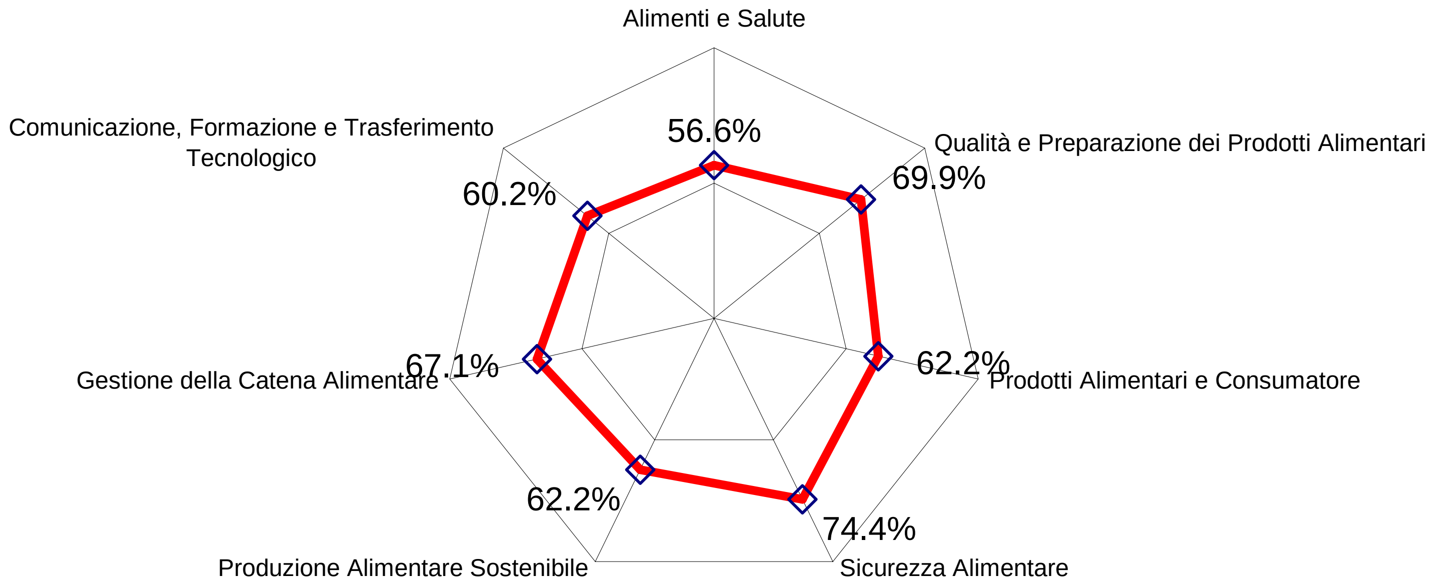
Product major innovation: 23%

Improvers who did not introduced major innovations: 42%

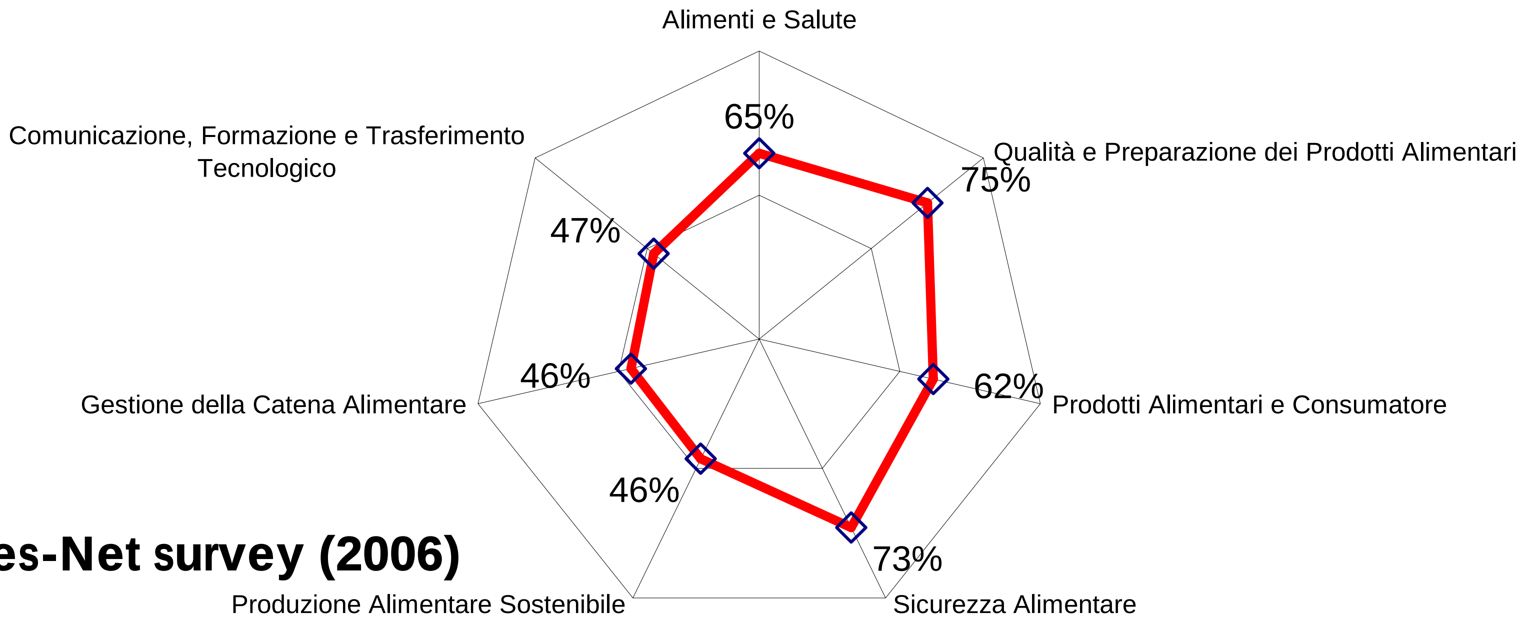
24% of all F&D firms did not introduce innovations in the last three years

SMEs priorities

Italy

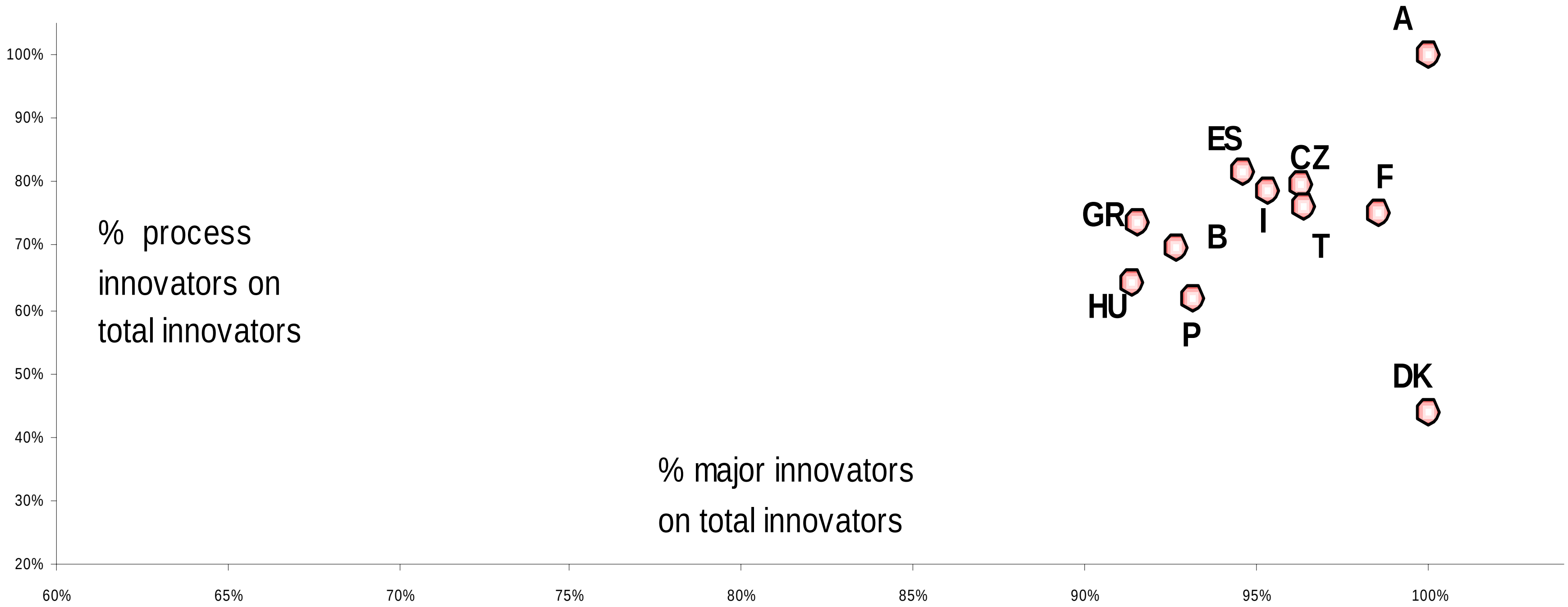


Europe



Source: Smes-Net survey (2006)

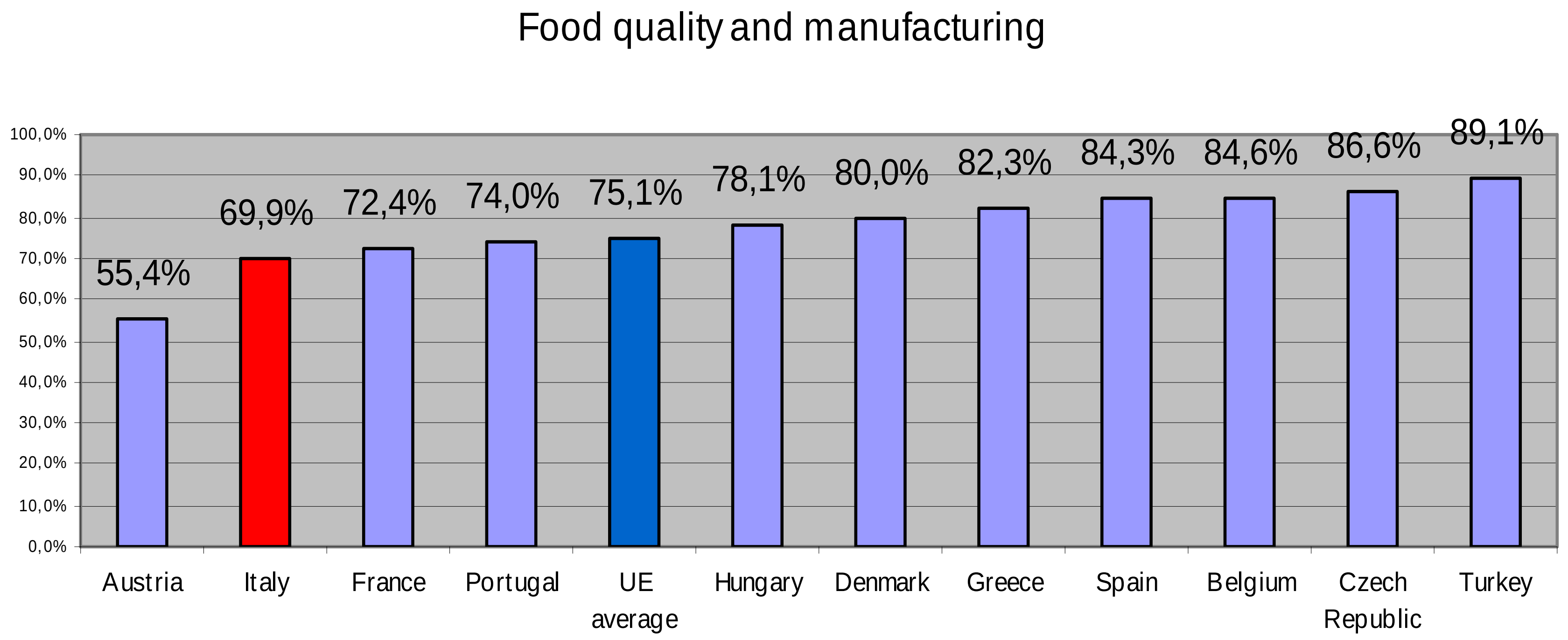
The innovation map of UE Food & Drink Industry



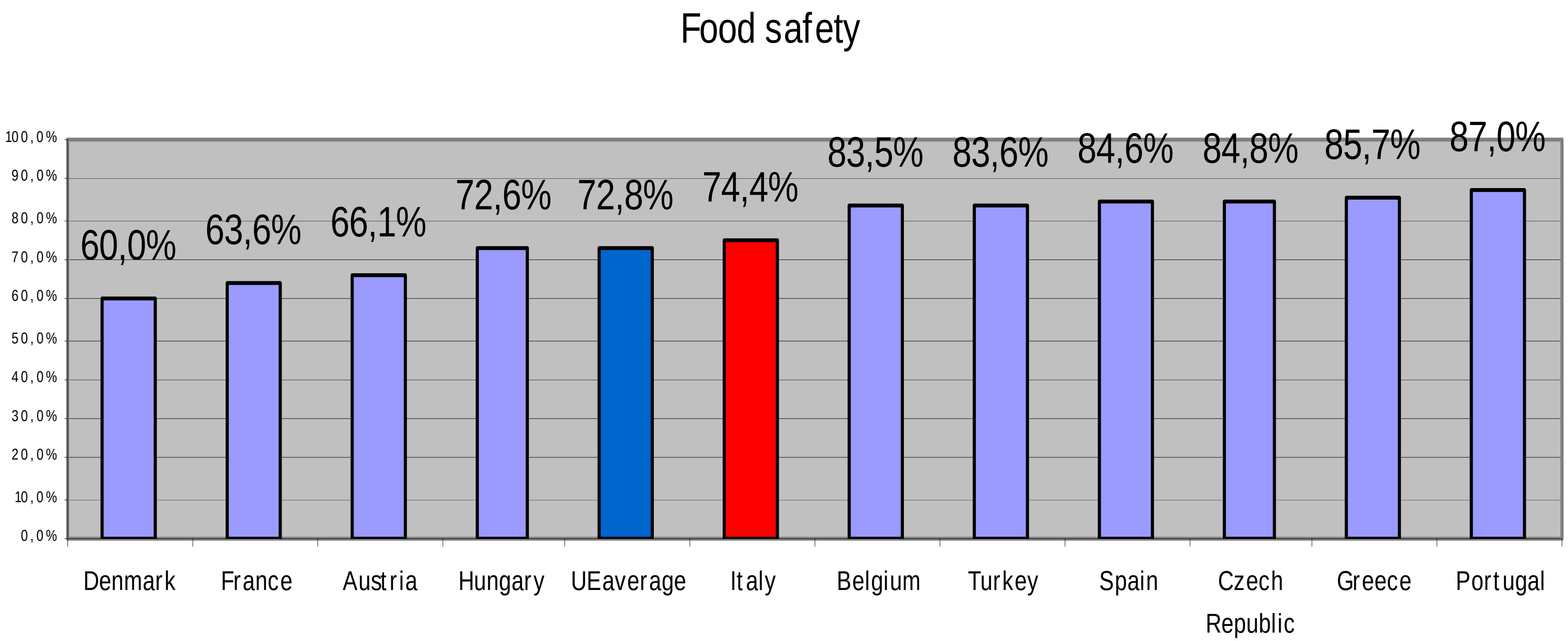
Note:
innovations introduced in the last three years:

- **If a firm introduce both a major innovation and improvments, it is considered as a major innovator.**
- **If a firm incroduced both process and product innovations, it is considered as process innovator.**

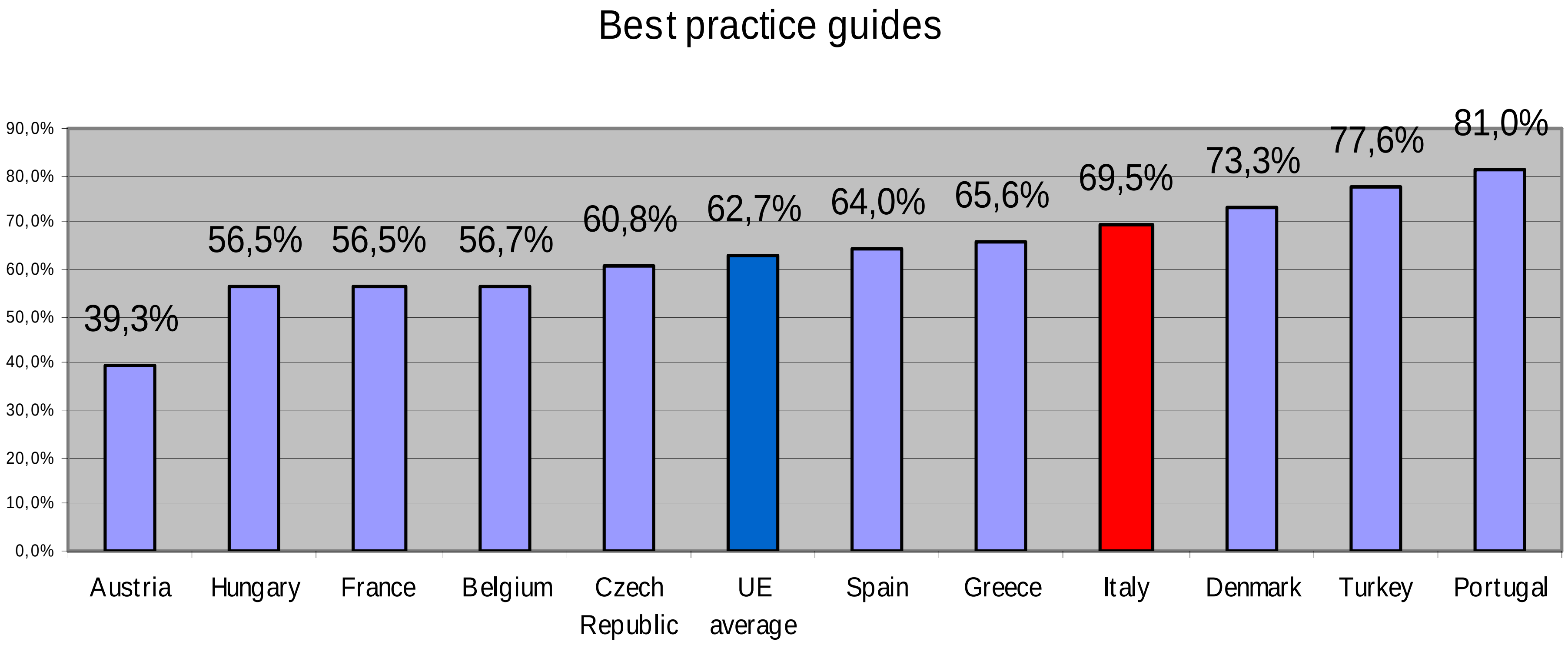
Opinions about Food Quality and Manufacturing



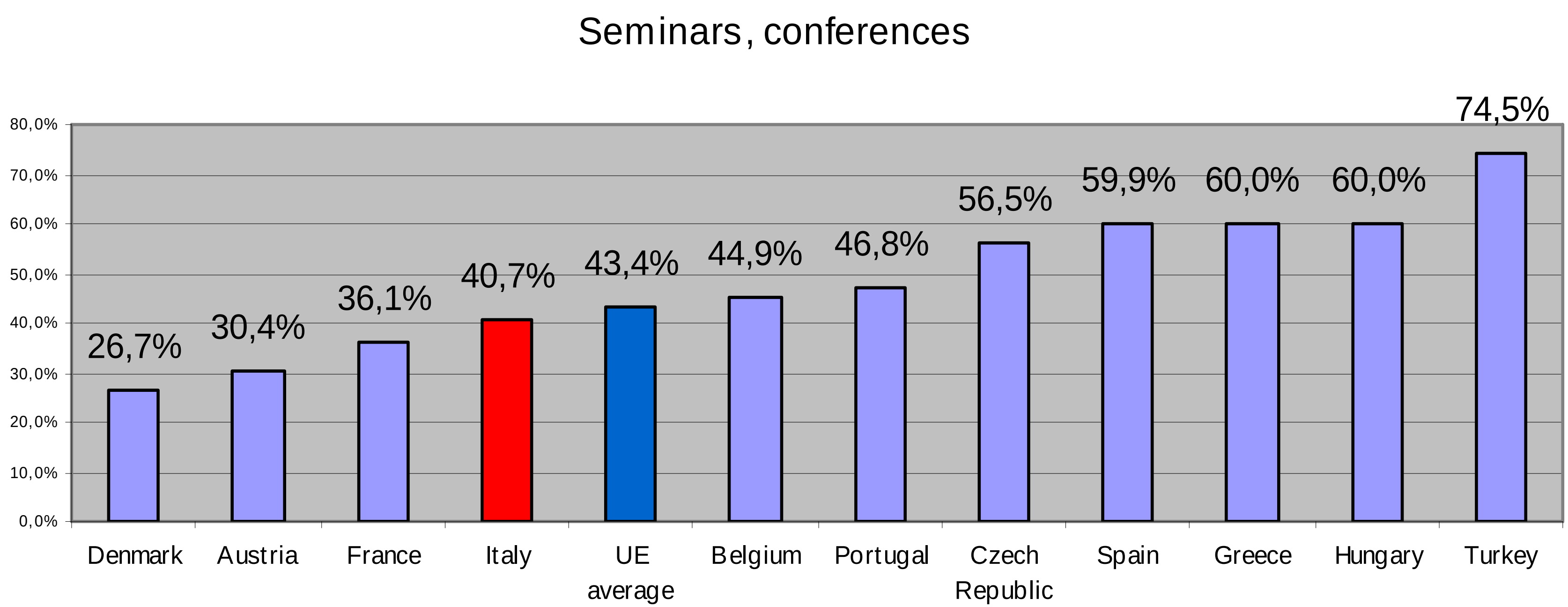
Opinions about Food Safety



Preferred innovation sustaining measure



Preferred innovation sustaining measure



The 5 priorities of the Italian Food and Drink Industry to be competitive

The Italian Food and Drink Industry has elaborated a strategy for the next 10 years structured in 5 priorities based on the outputs of the «Study on the scenarios towards 2015»

STRENGTHENING OF THE FOOD CHAIN

INNOVATION AND DEVELOPMENT

INDUSTRIAL POLICY

COMPANY DIMENSION

PROMOTION OF THE MADE IN ITALY

Source: Federalimentare

Challenge 1. Food & consumer

Ensuring that consumers make the healthy choice the easy choice

- **Goal 1. Measuring consumer behaviour in relation to food**
- **Goal 2. Developing comprehensive models of consumer food choice processes**
- **Goal 3. Developing strategies to induce behavioural change to improve consumer health and social responsibility**
- **Goal 4. Promoting effective interaction with consumer groups and consumers directly through communication and public participation**
- **Goal 5. Understanding consumer behaviour in relation to health and nutrition**
- **Goal 6. Understanding consumer behaviour in relation to food quality and manufacturing**
- **Goal 7. Understanding and addressing consumer concerns with food safety Goal 8 – Understanding consumers and their behaviour**
- **Goal 9 - Interaction with consumers to assess their willingness to pay for innovative products and for food chains which take into account sustainable consideration of environment, ethics and fair trade.**
- **Goal 10 - Designing and testing new ways to communicate nutritional/other values to target populations, with some attention devoted to changes in "kitchen logic".**

Source: " Italian Food for Life" - The Vision

Challenge 2.
Food & health
Delivering a healthy diet

- **Goal 1. Understanding brain function in relation to diet**
- **Goal 2. Understanding dietary effects on immune and intestinal function**
- **Goal 3. Understanding the link between diet and metabolic function**

Source: " Italian Food for Life" - The Vision

Challenge 3.
Food quality & manufacturing

Developing value-added food products with superior quality, convenience, availability and affordability

- **Goal 1. Producing tailor-made food products**
- **Goal 2. Improving process- and packaging design and process control**
- **Goal 3. Improving understanding of process-structure-property relationships**

Source: “ Italian Food for Life” - The Vision

Challenge 4. Food safety

Assuring safe foods that consumers can trust

- **Goal 1. Predicting and monitoring the behaviour and fate of relevant known and emerging biological hazards**
- **Goal 2. Predicting and monitoring the behaviour and fate of relevant known and emerging chemical hazards including toxins of biological origin**
- **Goal 3. Improving risk assessment and risk-benefit evaluation in the food chain**
- **Goal 4. Developing tools and addressing measures to ensure safety of the food chain**

Source: " Italian Food for Life" - The Vision

Challenge 5.
Sustainable food production

Achieving sustainable food production

- **Goal 1. Understanding of the sustainability of food production and supply in Italy**
- **Goal 2. Research on scenarios of future Italian food production and supply**
- **Goal 3. Developing sustainable processing, packaging and distribution**
- **Goal 4. Developing and implementing sustainable primary food production**

Source: " Italian Food for Life" - The Vision

Challenge 6.
Food chain management

Managing the food chain

- **Goal 1. Identification of possible scenarios**
- **Goal 2. Stabilising markets and supporting food chain dynamics through the generation and preservation of trust**
- **Goal 3. Improving the innovation potential of the food chain**
- **Goal 4. Supporting competitiveness through integration**
- **Goal 5. Participation of small producers in complex food chain operations**
- **Goal 6. Integrating food chain management and the consumer**

Challenge 7.

Communication, training and technology transfer

- **Goal 1. Communication**
- **Goal 2. Training**
- **Goal 3. Improved Technology Transfer**

7FP – PRIORITIES

Fork to farm. Consumers.

Accessing consumer sciences

Developing strategies for the prevention of children obesity

Food labelling and understanding the consumer behaviour

Fork to farm. Nutrition.

Effects of diet on the development of intestinal flora and on immune system

Development of strategies to fight against malnutrition in hospitals

Development of a harmonized database for nutrition research

Impact of diet on ageing

Effects of food on mental performance

Fork to farm. Processing.

Assessment and improvement of existing food and feed technologies

Developing validated shared models to be used in research on food technology, safety and nutrition

Nano-sensors and new quality control systems

7FP – PRIORITIES

Fork to farm. Safety and Quality.

Risk assessment of emerging food contaminants
Biocides and antibiotic resistance in food pathogens
New packaging technologies
Impact of feeds safety on foods safety
Characterization of nanoparticles
Developing technologies to inactivate TSE
Improving techniques used for sampling
New methods for screening foods and feeds
Development of methods to detect and control new viruses

Fork to farm. Safety and Quality/Environment/Food chain.

Integrated food chain approach
New predictive biomarkers for diet and health

Fork to farm. Food chain.

Impact of climate change on food safety

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Thanks for the attention