



CONCLUSIONS AND RESULTS OF THE PROTEIN SUMMIT 2010

AMSTERDAM | THE NETHERLANDS | 25 & 26 NOVEMBER 2010



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SUMMIT PARTNERS



Ministry of Economic Affairs,
Agriculture and Innovation



The Protein Summit 2010: A great way forward

Dear Colleague,

The Protein Summit 2010 was a great success. More than 130 delegates were present from the Netherlands, UK, Norway, Germany, Belgium, France, Italy, USA, Switzerland, Denmark, Spain, Ireland, Australia and other countries. Many sectors showed an interest in the developments on global protein supply and demand: retail, food manufacturers, government, food, ingredients companies, food processing companies, feed industries, finances/banks, research institutes and universities.



We do thank all Summit partners, being the Dutch Ministry of Economic Affairs, Agriculture and Innovation (EL&I), VION Food Group, DSM, TNO, Cosucra, Upfront, Quorn, and GfK, who have put a great amount of time and energy to the Summit.

Moreover, our Summit Chairs, Mr. Prof. Emmo Meijer (Unilever), Dr. Niek Snoeij (TNO), Prof. Dr. Leo den Hartog (Nutra), and Mr. D. Koelega (Ministry of EL&I), whom have done a great job in managing the discussions and outcomes of the Summit.

Last but not least, all delegates whom have contributed to all discussions and the result of this Summit.

Please feel free to contact us anytime about this Summit.

Looking forward to meeting and working with you again in 2012!

Kind regards on behalf of the Bridge2Food team.

Gerard Klein Essink
Managing Director



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Summit Partners



Deliverables of the Protein Summit 2010

Results of the Protein Summit, 25 & 26 November 2010 (Amsterdam)

Presence	130 delegates from The Netherlands, UK, Norway, Germany, Belgium, France, Italy, USA, Switzerland, Denmark, Spain, Ireland, Australia and other countries
Sectors	Delegates were present from retail, food manufacturers, government, food ingredients companies, food processing companies, feed industries, finances/banks, research institutes and universities
Chairs	Mr. E. Meijer (Unilever), N. Snoeij (TNO), L. den Hartog (Nutreco), D. Koelega (Ministry of EL&I)
Set-up	2 day Summit for leaders from industry, research and government
Programme	Day 1 – Plenary Day 2 – Three sessions. Themes: Business Opportunities, Sustainability Challenges, Research and Innovation Developments. Plenary closure.



1. Overall feedback delegates

Well organised, good balance between current trends and developments and future challenges and opportunities. Sessions on Business opportunities, Sustainability challenges and Research & Innovation goals during 2nd day gave extra input and room for discussion and exchange of ideas.

2. Desired deliverables of the Summit

The desired outcomes of the Summit were (as defined with the Chairman and the Dutch Ministry of Economic Affairs, Agriculture and Innovation) :

- Vision 2020/2050: is there a problem?
- What would be the building blocks for a “protein” innovation agenda?
- What are roles of the stakeholders?

Outcomes Day 1 of the Summit (plenary)

The discussions on day 1 during the plenary part of the programme of the Summit led to the following conclusions:

- A multi-channel approach is needed: more activities in existing protein foods chains like the meat, fish and dairy industry, as well as on developing new proteins sources. Networks?
- A Dutch & EU agenda on proteins is needed
- New targets should, however, be tangible and feasible
- An ambitious strategy should be developed towards 2020 vision, and the retail should be heavily involved.

The conclusions were converted into the following questions and issues for the Chairs of the different sessions on day 2:

- Is the transition manageable?
- Which chain contribution is needed?
- What would be the elements of a (Dutch) protein agenda?
- New business opportunities? Remain niches? Which innovations are needed for a transition?
- Which transitions are needed in the mainstream channels of milk, fish, meat or egg?
- What are the important other issues

Conclusions & results

3. Conclusions from the three themed Sessions

Day 2 - Session I: Business opportunities

Conclusions from the Business Session on the future of proteins and protein foods:

- With a focus on best practices a 30-40% gain in the efficiency of feed conversion is possible in the animal sector, whereas major improvements in crop yields with research and genetics can be achieved as well;
- A focus on waste management of food at households and in the food value chain can also contribute to reducing a potential problem of a shortage of proteins 2050. Other opportunities to beat this upcoming problem are carcass management, the use of new protein sources such as algae, and the possibility to re-use meat/bone meal as feedstuffs;
- Key to successful implementation strategies for new and renewable protein sources is an excellent communication. The awareness of a potential protein shortage is not very high since Western consumers have a high disposable income;
- The production allocation and resources of government interventions in sourcing and supply (China, Russia) will have an economic impact in the near future. More cross chain networks and collaborations should be developed in making quantum leaps forward towards 2020 or 2030. The future agenda of many industries does not stretch more than 3-5 years;
- The triangle industry, research, and government (+NGO) has to play an important role in managing the future issues.

Day 2 - Session II: Sustainability Challenges

Conclusions drawn during this session were:

- Security of supply and potential future shortages and access to proteins stresses the main sustainability issues;
- Major improvements in the efficiency in usage of raw materials can be achieved and should be point of focus in relation to sustainability;
- Effective marketing strategies are needed to grow the relevance of sustainability concepts;
- For a faster and better implementation of sustainability policies by manufacturers and players in the value chain more transparency in the price forming process of food products is required.



Conclusions & results

Day 2 - Session III: Research & Innovation Developments

The following conclusions were made during Session III:

- In the existing large proteins foods (and protein ingredients) value chains substantial gains can be achieved. Major improvements in efficiency can be obtained;
- There is sufficient know how available as well as potential based on the current technologies to achieve;
- Re-balancing between the use of vegetable and animal proteins will take place as a result of soaring prices of animal based proteins, which will lead to more usage of vegetable based proteins;
- Valorisation and bio-refinery offer new opportunities for proteins such as potato and canola. It will take a long time before these proteins will be used on a large scale in food stuffs;
- New raw materials like algae, insect, in-vitro meat will most likely find usage in the feed industry as major problem with consumer acceptance can be expected.
- The government can take a role as initiator, launching customer and platform organiser;
- Algae offer the greatest potential and large companies will need to take their responsibility in speeding up the development of these new value chains. Government innovation policies assist in speeding up industry growth.



Conclusions & results

4. Overall conclusions vs. desired deliverables

Vision 2020/2050: is there a problem?

There can be a problem, yet there is time and there are many ways to improve yields and feed conversion rates with the use of current technologies and know-how. However, consumer and industry awareness of a potential shortage of proteins is low. So, in fact there will be a problem in the end if nobody takes care or stakeholders continue to neglect the issue.



What would be the building blocks for a “protein” innovation agenda?

Important building blocks are the current opportunities to tailor the challenges in the meat, fish, dairy and egg chains by working more efficiently and focusing on sustainability. Targets will need to be developed in the triangle industry (+retail!), research and governments (+NGO's) with a timeline set at a nearby future e.g. 2020. More cross chain co-operations and networks will need to be developed. New vegetable proteins from algae offer great potential when major players in the food and feed chains work with the current companies who are active in this fast growing industry to set the industry needs and specifications.

What are roles of the stakeholders?

The industry and retail will need to get a higher awareness and lead the developments in creating more sustainable protein value chains and in developing new protein sources. More research is needed, however, needed. The government can play an important role in organising more cross-chain and industry platforms, public-private partnerships, and fund (more) innovative research.

5. Next steps

- Bridge2Food and the delegates hope that the recommendations of the summit will assist in the EU & Dutch policy making on proteins and to a targeted approach on a Protein 2020 agenda
- Recommendation: Organise a 2nd Protein Summit Q1/Q2 2012.



25 November - Plenary Session

Global Challenges, Global Commitments

- 08.45 Registration & morning coffee
- 09.30 Opening Summit Chairman - *Mr. Prof. Dr. Emmo Meijer, Senior Vice President Strategy, Unilever (the Netherlands)*
- 09.45 The Dutch food agenda for sustainability and innovation - *Ms. Annemie Burger, Director General, Ministry of Economic Affairs, Agriculture and Innovation (the Netherlands)*
- 10.20 Global protein production: driving forces behind demand & supply - *Mr. Jeroen Leffelaar, Global Head Animal Proteins, Rabobank International (the Netherlands)*
- 11.00 Morning break and networking at Protein Innovation Plaza, sponsored by Quorn, Premier Foods
- 11.30 Business & research challenges: co-operation & innovation challenges in protein value chains to meet consumer needs - *Ms. Petra Goyens, Director Biotechnologies, Agriculture, Food Research, DG Research, European Commission (Belgium)*
- 12.05 Future global need for proteins - Beyond protein consumption globally - *Mr. Prof. Dr. Ir. Rudy Rabbinge, Professor, Wageningen UR, Sustainable Development & Food Security (the Netherlands)*
- 12.40 Lunch break and networking at Protein Innovation Plaza, sponsored by VION Food Group
- 14.15 Sustainability: where to go from here in the UK retail industry - *Ms. Alison Austin, Independent Consultant, Environment and Business (UK)*
- 14.50 Business and consumers perspectives & challenges in food - *Mr. Peter Beckers, COO, VION Food Group Netherlands, Germany and International (the Netherlands)*
- 15.25 Afternoon break and networking at Protein Innovation Plaza, sponsored by GfK
- 15.55 Trends, developments and consumer awareness of protein foods in Europe - *Mr. Lucien van der Hoeven, Managing Director, GfK (the Netherlands)*
- 16.30 Panel discussion chaired by Mr. Emmo Meijer
- 17.15 Cocktail reception and networking at Protein Innovation Plaza
- 19.00 Closing



26 November - Three Sessions: Business Opportunities & Sustainability Challenges

SESSION I: BUSINESS OPPORTUNITIES



- 09.00 Introduction by chairman - Mr. Leo den Hartog, Director R&D and Quality Affairs, Nutreco (the Netherlands)
- 09.10 Managing the protein dialogue in the Dutch retail sector - Mr. Marc Jansen, Director Consumer Affairs, CBL (the Netherlands)
- 09.45 Sustainability challenges in seafood business – The Norwegian case - Mr. Bjørn Eirik Olsen, Director, Nofima (Norway)
- 10.20 Morning break at Protein Innovation Plaza, sponsored by VION Food Group
- 10.50 Future perspectives on sustainability as a business option in the global dairy industry - Ms. Sarah Paterson, Manager Trade Policy Europe, Fonterra Co-operative Group (UK)
- 11.25 Rice proteins: a new vegetable protein opportunity - Ms. Ginny Park, Senior Scientist & Global Technical Marketer at Food R&D, CJ CheilJedang Corporation (South-Korea)
- 12.00 Going for a sustainable business with proteins for animal feed - Mr. Leo den Hartog, Director R&D and Quality Affairs, Nutreco (the Netherlands)
- 12.35 Lunch break at Protein Innovation Plaza
- 14.00 Panel session discussion chaired by Mr. Leo den Hartog

SESSION II: SUSTAINABILITY CHALLENGES



- 09.00 Introduction by chairman - Mr. Dick Koelega, Senior Strategy Advisor, Ministry of Economic Affairs, Agriculture and Innovation (the Netherlands)
- 09.10 What does sustainability mean for a dairy-free brand leader - Mr. Koen Bouckaert, Strategy & Business Development Director, Alpro Soya (Belgium)
- 09.45 Value chain opportunities & sustainable protein chains in Europe - Mr. Reinhart Schmitt, Managing Director Solae Europe, Solae (Switzerland)
- 10.20 Morning break at Protein Innovation Plaza, sponsored by VION Food Group
- 10.50 Future opportunities with fungi proteins - Mr. Tim Finnigan, Innovation Manager Quorn, Premier Foods (UK)
- 11.25 Addressing public concerns for dairy and meat consumption in Switzerland - Ms. Brigit Hofer, Responsible Consumer Policy, Coop (Switzerland)
- 12.00 Certifying the Sustainability of Protein and Other Ingredients Derived from Soy - Mr. John Fagan, Founder & Chief Scientific Officer, Genetic ID Group (USA)
- 12.35 Lunch break at Protein Innovation Plaza
- 14.00 Panel session discussion chaired by Mr. Dick Koelega



Research and Innovation Developments

SESSION III: RESEARCH & INNOVATION OPPORTUNITIES



- 09.00 Introduction by chairman - *Mr. Niek Snoeij, Managing Director, TNO Quality of Life (the Netherlands)*
- 09.10 Innovation opportunities for protein foods - *Mr. Ronald Visschers, Programme Manager Food Quality and Production, TNO (the Netherlands)*
- 09.45 Potato proteins: turning an environmental problem into business - *Mr. Marco Giuseppin, R&D Director, Solanic (the Netherlands)*
- 10.20 Morning break at Protein Innovation Plaza, sponsored by VION Food Group
- 10.50 Adding value to protein side-streams - *Mr. Johann Tergesen, Managing Director, Burcon NutraScience (Canada)*
- 11.25 The real future: making meat from single cells - *Mr. Prof. Dr. Joost Teixeira de Mattas, University of Amsterdam (the Netherlands)*
- 12.00 Innovation beyond natural borders: Protein Knowledge in The Netherlands - *Mr. Gerard Klein Essink, Managing Director, Bridge2Food (the Netherlands)*
- 12.35 Lunch break at Protein Innovation Plaza
- 14.00 Panel session discussion chaired by Mr. Niek Snoeij

PLENARY SESSION

- 15.05 Afternoon break and networking at Protein innovation Plaza
- 15.30 Plenary discussion where highlights & conclusions of sessions will be chaired by Mr. Emmo Meijer
- 16.15 Closing



Bridge2Food: Outlook 2011

The bridge between food specialists: strategic consultancy & research

We take pride in being the bridge between different food experiences and know-how and in delivering custom-made food solutions with a personal touch. We enjoy creating new international networks between food specialists and improving know-how by organizing platforms, conferences and courses around fast-moving food categories, as well as on food proteins. We also provide boardroom level strategic advice including practical hands-on experience for more tactical or operational purposes.

Protein Innovation Network (PIN)

Bridge2Food is an active partner in creating a Protein Innovation Network for professionals in research, development & applications, sales & marketing, processing & technology, buying related to proteins and food. Check us out on Bridge2food.com for more information and link yourself to your colleagues in the industry.

Summits, Conferences, Courses & In-Company Trainings

A wide range of two-day food industry conferences for senior managers of food manufacturers in Europe, the USA and in Asia has and will be organised by Bridge2Food. These conferences have become platforms and networks for the sport & performance nutrition, healthy & nutritional bars, meat-free and dairy-free industry in many ways. At Bridge2Food, we run three-day food industry courses for food technicians on topics like food proteins and soya drinks & desserts courses. In-company trainings on specific food subjects can be tailored to customer needs. This can be a very cost efficient way of training the staff on developments in the food value chain or on specific topics such as food proteins, protein functionalities or applications. We combine a personal touch with attention to detail. Building bridges between food specialists, business and insights with our know-how, experience and network friends is fun!

Past network meetings in Europa, USA & Asia include:

Sports & Performance Nutrition

Healthy & Nutritional Bars Europe

Meat-free & Dairy-free

Soya-based Drinks & Desserts Europe & Asia

Protein Summit

Food Protein Innovation

Food Proteins Course: Properties, Functionalities & Applications

Soya Drinks & Desserts Application Course

Foods for the Elderly

School Children Foods

2011 PIN Programme

- Sport & Performance Nutrition 2011
26 & 27 May 2011, Amsterdam (The Netherlands)
- 5th Food Proteins Course
15 - 17 June 2011, New Orleans (USA)
- Protein Technology innovations 2011
28 & 29 September 2011, Amsterdam (The Netherlands)
- Elderly & Medical Foods 2011 (EU)
12 & 13 October 2011, Amsterdam (The Netherlands)

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FOOD INGREDIENTS first





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