

26 Settembre
2023

Orto Botanico - ROMA

Daniele Rossi - Delegato R&I
Chairman Copa-Cogeca WP R&I

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Processi innovativi: Strategie efficaci per la sostenibilità di Filiera

A) AGENDA EU 4 the Sustainable Food System (SFS 2020) (*)

3.1. ENSURE A TRULY INTEGRATED APPROACH TO BRING ABOUT A SUSTAINABLE FOOD SYSTEM 32

3.1.1. *Adopt an active step-wise policy transition to integrate sustainable food system thinking into existing EU sectoral policies 32*

3.1.2. *Take a leadership role to support transformation of the food system at the global, European, national, regional and local levels 34*

3.1.3. *Develop responsive, learning-focused policy approaches and governance structures including through pilot initiatives, assessing their suitability for broader adoption 35*

(*) Group of Chief Scientific Advisors - Scientific Opinion No.8, Mar 2020 Independent Expert Report (SAM)

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3.2. ADDRESS POWER AND INFORMATION ASYMMETRIES IN THE FOOD SYSTEM 38

3.2.1 *Increase the policy focus on food manufacturers and retailers ... 38*

3.2.2 *Support a food environment that helps citizens to make healthy and sustainable food choices 40*

3.2.3 *Strengthen the more vulnerable actors in the food system 40*

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3.3. COMBINE REGULATORY, FINANCIAL, BEHAVIOURAL, INFORMATION, COMMUNICATION, AND EDUCATION MEASURES

3.3.1. Binding policy measures, such as regulation and fiscal measures, should be considered the main drivers to achieve change towards food sustainability.

3.3.2. Trusted consumer information, including independent and transparent third-party certification and labelling standards; education and communication initiatives, such as awareness campaigns; and behavioural tools, for example 'nudging', may help to influence better consumer choice.

3.3.3. However, these measures are insufficient on their own, because consumer choices are also affected by other diverse and interacting factors as cultural food taste preferences, advertising or pricing.

3.3.4. Voluntary industry or consumer initiatives can be helpful, but should not be relied upon as the main drivers of change. Well-designed instrument mixes are likely to be the most effective, and an iterative, responsive and adaptive approach with appropriate monitoring is recommended.

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AGENDA EU 4 the Sustainable Food System (SFS 2020)

**JOINT OPEN LETTER ON THE NEED FOR A STRONG PROPOSAL ON
AN EU LEGISLATIVE FRAMEWORK FOR SUSTAINABLE FOOD SYSTEMS (Brussels 10/2/2023)**

Dear President von der Leyen,

While some stakeholders and policy makers are instrumentalizing the current geo-political context to weaken the Farm2Fork strategy, we would like to reiterate our full support for the publication of this proposal.

ACU Associazione Consumatori Utenti

Altroconsumo

BEUC

CONVIVI Aosta

Distretto di Economia Solidale Altro Tirreno

EFFAT Italian Coalition "Cambiamo Agricoltura"

Euro Coop

Eurocare

Oxfam

SlowFood

Federazione Nazionale Pro Natura

Greenpeace

ICLEI

IFOAM

Legambiente

IPES Food

WWF

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AGENDA EU 4 the Sustainable Food System (SFS 2020)

- EUROPEAN SUSTAINABILITY REPORTING STANDARDS (14 06 2023).

Presentation to EFRAG SRB

Sustainability crisis, European Green Deal, sustainable finance agenda

- Covid, Russian invasion of Ukraine, challenging economic context
- Announcement of general 25% reduction in reporting requirements

In this context =>

Consistent with CSRD ambition

Respect EFRAG technical expertise

Keep overall package together (12 standards)

Proportionality and flexibility, especially at the start and especially for smaller companies

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AGENDA EU 4 the Sustainable Food System – SFS 2020

EUROPEAN SUSTAINABILITY REPORTING STANDARDS (14 06 2023)

Environmental standards

ESRS E2-E5: classification of each action according to a layer of the mitigation hierarchy.

ESRS E4: biodiversity transition plan.

ESRS E4: compatibility of business model and strategy with “planetary boundaries”.

ESRS E4: metrics on invasive alien species, impact drivers of land-use change, and ecosystem extent and condition

ESRS E4: land-use based on life-cycle assessment.

Social standards

ESRS S1: Certain disclosures and metrics regarding non-employees:

- Breakdown of number of non-employees by category and type of work performed
- Collective bargaining coverage
- Whether paid adequate wage
- Social protection coverage
- Cases of work-related ill-health
- Number of days lost of injuries, accidents, fatalities

ESRS S1: for employees not covered by collective bargaining agreements, whether their working conditions are determined by reference to agreements which apply to its other employees or undertakings

ESRS S1: for employees not covered by social protection, breakdown by country and type of employee

ESRS S1: breakdown by employee category regarding participation in training.

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EUROPEAN SUSTAINABILITY REPORTING STANDARDS (14 06 2023)

Governance standard ESRS G1

Number and nature of confirmed incidents of bribery or corruption

Details of public legal cases brought against the undertaking for bribery and corruption

Actions taken to support “vulnerable suppliers”

Cross-cutting standards

ESRS 1: Companies may omit “classified” and “sensitive” information.

ESRS 2: Provision to allow companies to signal uncertainty of forward-looking information.

ESRS 1: deletion of requirement to use “in-house” info during 1st 3 years if company cannot gather value-chain info.

ESRS 1: Disaggregation of information by significant site or asset if material impact, risk or opportunity is “highly dependent on” specific site or asset (“is linked to” in EFRAG advice).

ESRS 2: disclosure of “sustainability-related goals in terms of significant groups of products and services, customer categories, geographical areas and relationships with stakeholders” –“significant” added.

ESRS 2: disclosure of “the undertaking’s understanding of the interests and views of its key stakeholders/”key” added

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FARMERS AND FOOD INDUSTRY: FIGURES, ROLES AND GOALS

The Food Sector is Under Pressure

Pandemic/war crisis

Diseases

Malnutrition

Environmental pollution

Biodiversity loss

Resource scarcity

Climate change

Land-use conflicts

Animal welfare

Food security

Extra UE Competition

Low innovation rate

Companies' size



FARMERS AND FOOD INDUSTRY: 2020 EU BIO-ECONOMY

EU bio-economy turnover of 2.980 billion € with 21,11 million employees.

Sector	Turnover (Billion €)	Employees (million)	Source
Food & Drink Industry	1.304	4.2	FoodDrinkEurope
Agriculture	473	11,0	COPA-COGECA
Fisheries	16	0.5	FAO
Paper, Leather etc.	470	1,9	CEPI
Forestry	371	2,0	CEI-BOIS
Others (build, textile, seeds, breeds.....)	250	1,2	CEFIC - CIVA
Bio-based materials	96	0,31	
<i>Chemistry</i>	80 (est)*	0,15 (est)*	USDA, Arthur D Little, Festel, McKinsey, CEFIC
<i>Enzymes</i>	6(est)*	0,005 (est)*	Amfep, Novozymes, Danisco/Genencor, DSM
<i>Biofuels</i>	10	0,15	EBB, eBio
Total	2.980	21,11	

Italian Food Industry: 2011-2023 turnover

	2011 (Bil €)	2017 (Bil €)	2023 (Bil €) EST.
FATTURATO (Valore)	124 (+2,3%)	143 (+2,6%)	182 (+4,5%)
PRODUZIONE (Quantità)	- 0,3%	+ 0,9%	+ 1,5%
NUMERO IMPRESE :	62.820	59.310	56.750
Di CUI INDUSTRIALI	6.957 (con oltre 9 addetti)	6.860 (con oltre 9 addetti)	6.810 (con oltre 9 addetti)
NUMERO ADDETTI	408.000	425.000	472.000
EXPORT	21,1 (+10,0%)	32,1 (+8,7%)	49,2 (+8,9%)
IMPORT	17,5 (+9,8%)	23,4 (+5,6%)	33,5 (+7,2%)
SALDO	4,6 (+7,0%)	8,7 (+14,8%)	15,7 (+13,4%)
TOTALE CONSUMI ALIMENTARI	206 (Variaz. Reale + 1,0%)	208 (Variaz. Reale -3%)	202 (Variaz. Reale - 5,3%)
POSIZIONE NELL'INDUSTRIA MANIFATTURIERA ITALIANA	2° posto (12%) dopo settore metalmeccanico	2° posto (14%) dopo settore metalmeccanico	2° posto (16%) dopo settore metalmeccanico

The European way – The Mind Map

INNOVATIVE FARMERS & AGRICULTURAL COOPERATIVES

- **Enhanced Knowledge Exchange**
 - - Farmers learning from farmers
 - - Farmers leading Innovation
 - - **Links between conventional and organic systems**
- **Green Growth;**
 - - **Efficient / Precision use of resources**
 - - **Active management of natural resources**
 - - **Climate change mitigation and adaptation**
 - - **Closing the yield gap/ sustainable intensification**
 - - **Improved agrifood system productivity**
- **Fair and Competitive Value Chains**
 - - Collaboration & Cooperation across all sectors in the chain
 - - New strategy for value chains and new business models
 - - **Digitization, ICT, Big Data management, Artificial Intelligence**
- **Healthy Farming;**
 - - **Integrated pest management and soil/water health**
 - - Dealing with emerging pests and diseases
 - - Enhancing biosecurity in housed livestock
 - - **Plant and animal breeding for resilience and robustness – nbts/ngts**



F&D INDUSTRY

FUTURE TRENDS



- Wide variety of products.
- Convenience, ready to eat.
- Authenticity, Origin, Territory, Landscape, Narrative.
- Attention to specific nutritional needs.
- Tasty products, texture, density, colour, portion, pack.
- Products affordable in price / quality ratio.
- Attention to specific needs: religious / ethnic / ethical .
- **Attention to environment, sustainability, organic, naturalness, no waste , recovery.**
- New occasions: brunches, aperos, happy hours, street food, catering, slow food, grazing, gastros.

Processi innovativi:

Strategie efficaci per la sostenibilità di Filiera

The Policy Game Seminar – Rome, the 26^o of June 2023

Proff. Matteo Caroli / Daniele Rossi

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FARMERS AND FOOD INDUSTRY: FIGURES, ROLES AND GOALS

1. **Sustainability** means undertaking business models and managing companies to **maximize economic and environmental and social value all together.**
2. It also means that economic, environmental and social goals have the same relevance and have to be addressed **together, taking into account their interdependencies.**
3. Sustainability overcomes the past approach based on the idea that private companies' main objective is simply maximizing economic value: **that does not mean that economic goals are less relevant than environmental & social ones.** Or that environmental goals are more relevant than social and economic ones.
4. Tackling development challenges through the reorientation of food systems **situates interventions in a complex social arena.**

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The Policy Game Seminar – Rome, 26° of June 2023

PROFF: MATTEO CAROLI – DANIELE ROSSI

FARMERS AND FOOD INDUSTRY: FIGURES, ROLES AND GOALS

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5. Agrifood is an ecosystem **where trade-offs abound**, and where choices about these trade-offs & resulting winners & losers are framed by value-based judgment.
6. Yet, while the systemic framing of the SDGs paradigm explicitly demands that [development policy](#) better accounts for and manages trade-offs and synergies, the main stay of agrifood programming continues to rely on **single point interventions**.
7. These interventions are rarely adequately embedded in the **wider systemic context where trade-offs play out**. Linear solutions to complex development issue are offered.
8. Achieving responsible consumption and production requires not only making production processes and management systems more environmentally focused, **but also ensuring profitability of producers, traders, and retailers**.
9. Once more, investments in **cash, labor or knowledge** are required.

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10. Indeed, undertaking ESG and economic objectives together is a big challenge.

11. It requires to understand and overcome the negative impact that actions undertaken to reach one of the four objectives can have on some of the others.

12. Moreover, the positive interplay between environmental, social and economic goals can be reached foremost in medium-long term, indeed rarely in short term.

13. It entails that positive interplay can be settled only if the companies are long term profit maximizers, and the stakeholders are “patients”: financial investors, as well as social actors.

14. It also requires a well rooted mutual trust between the company and the stakeholders. A key role of institutions should be to develop eco-system where different actors can develop a strong mutual trust.

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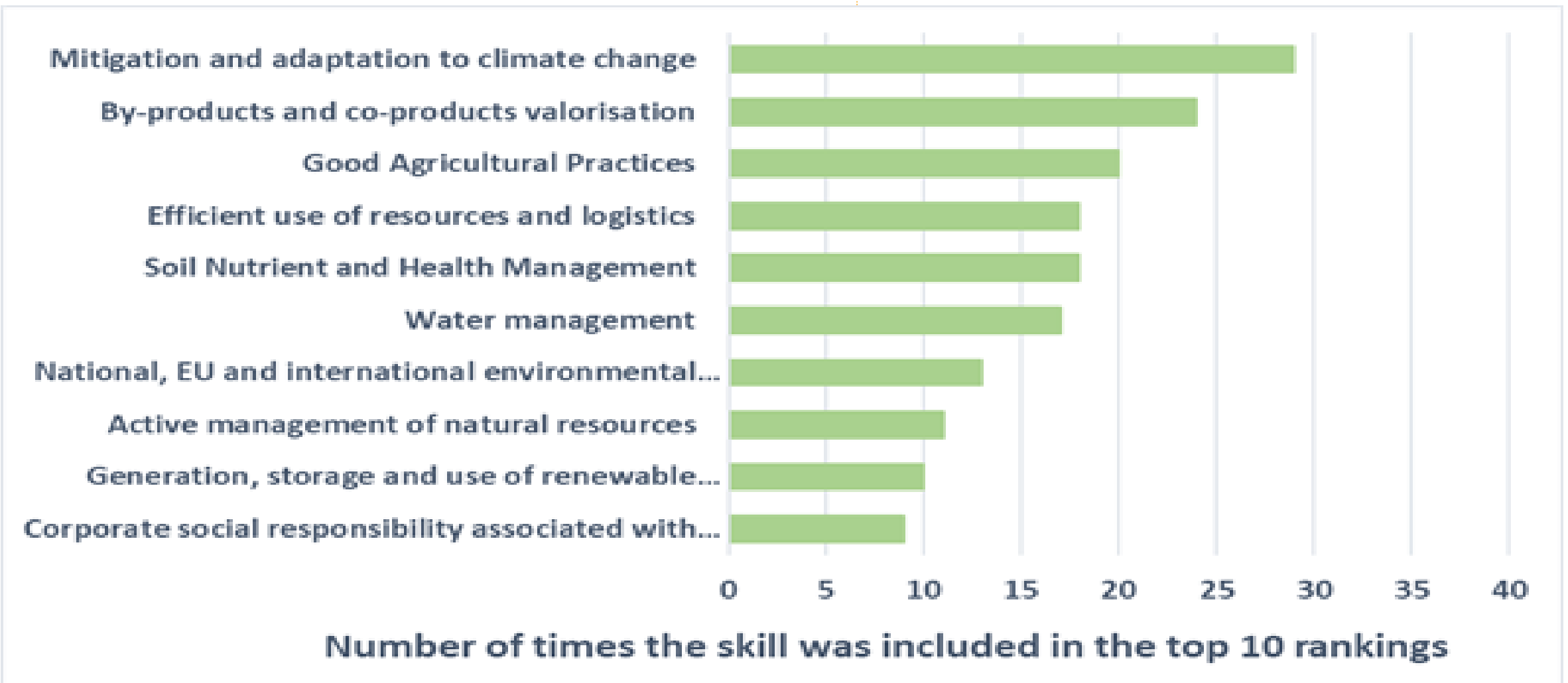
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NEW PROFILES: SFS MANAGERS AND CERTIFIERS

Sustainability Skill Needs (Assessment Fields/I-Restart)



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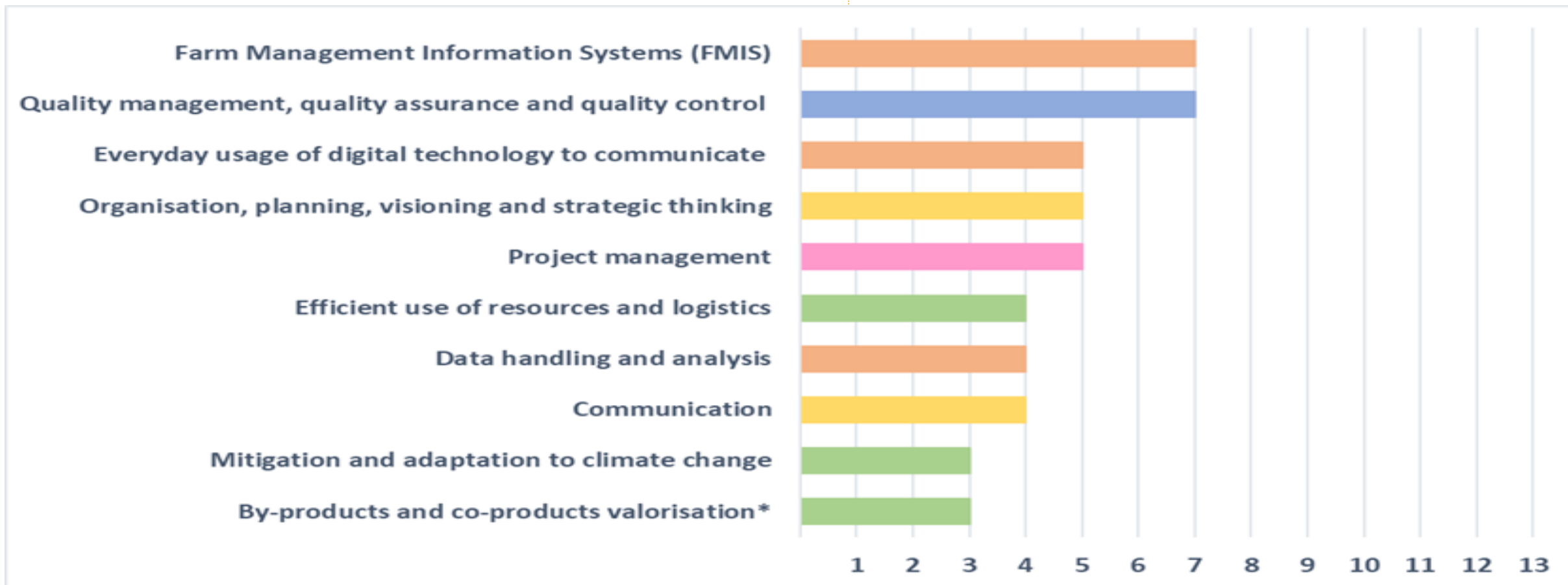
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NEW PROFILES: SFS MANAGERS AND CERTIFIERS

MOST IMPORTANT SKILLS IN ITALY 2022 (ASSESSMENT FIELDS/I-RESTART)



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NEW PROFILES: SFS MANAGERS AND CERTIFIERS

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An initiative of the European Commission



- The Pact for Skills brings together various stakeholders to ensure high-quality vocational education and training, as well as upskilling and reskilling of the European workforce in all ecosystems, including the agri-food sector.
- This initiative aims to meet the challenges of green and digital transitions while attracting and retaining a skilled workforce.
- The agri-food ecosystem, comprising the largest producing and manufacturing sectors in Europe, faces globalization, climate change, changing consumer demands, and competition.
- The ecosystem requires a skilled workforce, including agronomists, sustainability experts, digital and food technologists, while addressing skill shortages, bridging curriculum gaps, and supporting SMEs.
- The Pact4skills is associated with both the FIELDS and I-RESTART projects, coordinated by the University of Turin and the Confederation of Farmers - Confagricoltura.

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NEW PROFILES: SFS MANAGERS AND CERTIFIERS

EU and National/Regional Regulations, do these match our needs?

EU level EQF (European Qualification Framework)

ESCO (European skills, competences, qualifications and occupations)

EQUAVET (European Quality Assurance Reference Framework for Vocational Education and Training)

ECVET (European Credit System for Vocational Education and Training (ECVET))

European skills agenda (and focus on LLL), Pact for skills, Digital Education Action Plan

ECF The European Entrepreneurship Competence Framework

National qualification systems, credits, diploma's, certification systems

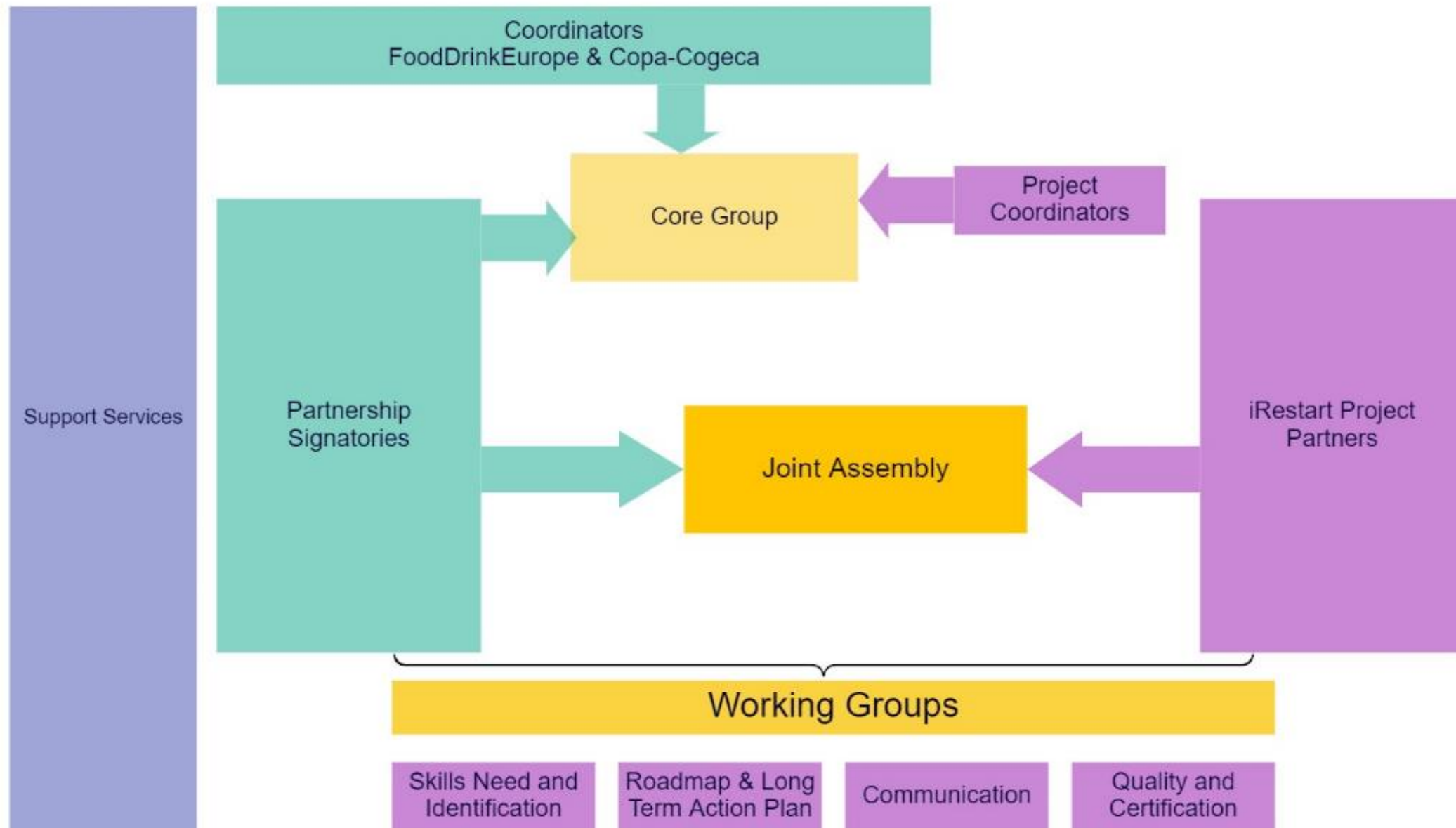
Relation (tasks, responsibilities) between government and education/training institutes

Teacher and trainer competences and requirements, Training and education boards

Adult education/LLL, Inclusion and gender equality, e.g. social farming, specific target groups

Personal training account and other training grants

EU Observatory of the AgriFood Ecosystem



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STRATEGIES AND EFFECTIVE POLICY TOOLS: Prof. Matteo Caroli – Daniele Rossi

1. Private businesses across the world are facing to change their business models and incorporate societal outcomes into their typically profit focused targets.
2. While there is little to no evidence on the impacts of this transition available, it offers opportunities for **collaborative efforts** between Governments, stakeholders, and business to explore how these are changing the agri-food system and where business and public interests are aligned or conflicting.
3. Given that any intervention implies some trade-offs, it is urgent to **make these trade-offs explicit and discuss them openly and honestly**.
4. The weighing of the positive and negative consequences of interventions involves **judgment calls over societal goals** that affect different targets, groups of people, regions, or any number of other segments within the system.
5. There is a need for a **much broader societal debate locally as well as globally** to define the goals in relation to acceptable trade-offs and [mitigation measures](#) and the resulting question on who can and should shoulder the costs.
6. ^t The Policy Game methodology gave us back 5 policy dimensions to be managed: legislative map, impact, interconnections, process (modelling), sub optimal policy tools mix - the ranking matrix.

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Thank you!

Yours Daniel Rossi

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