

Transition Pathway

for a more resilient, sustainable and digital agri-food ecosystem

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Relevant EU initiatives in Agri-food

The European Green Deal

Farm to Fork Strategy

Biodiversity Strategy

Bioeconomy Strategy

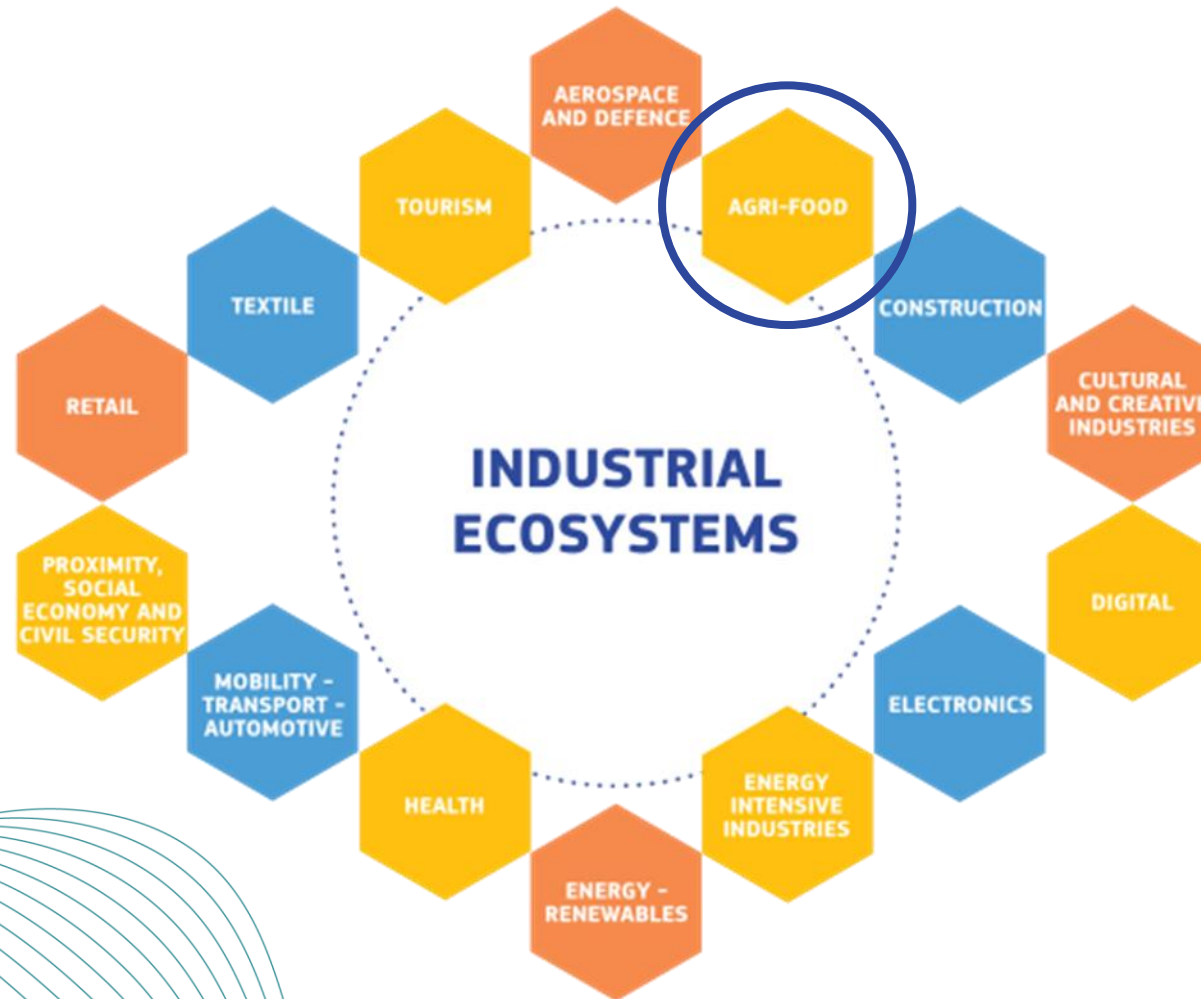
Blue economy Strategy

Common Agricultural Policy (CAP) / Common Fisheries Policy (CFP)

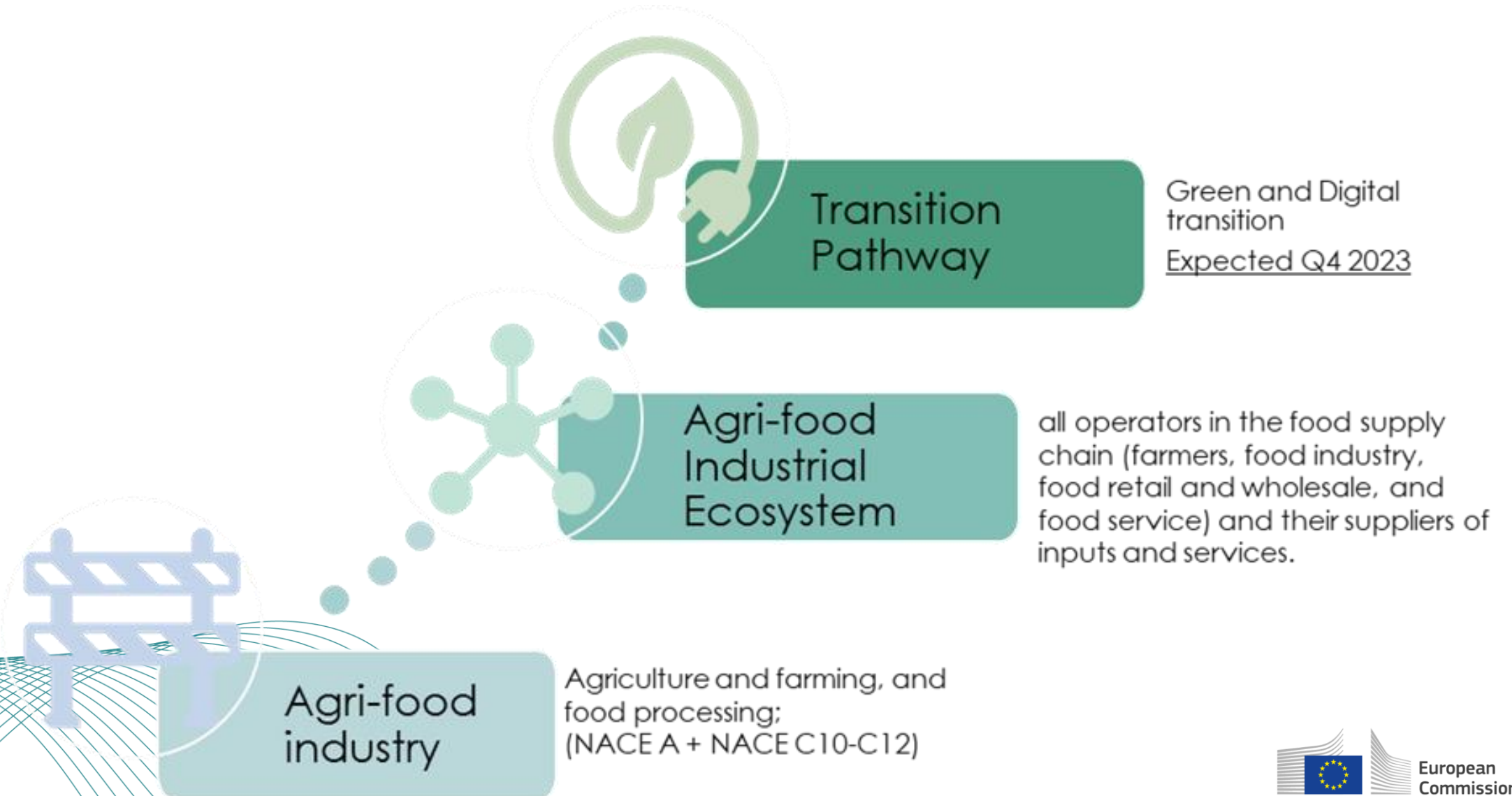
The EU Code of Conduct on responsible food business and marketing practices

EU New Industrial Strategy – Industrial eco-systems

Industrial Ecosystems in the EU



What is the agri-food ecosystem?



What is the agri-food transition pathway?

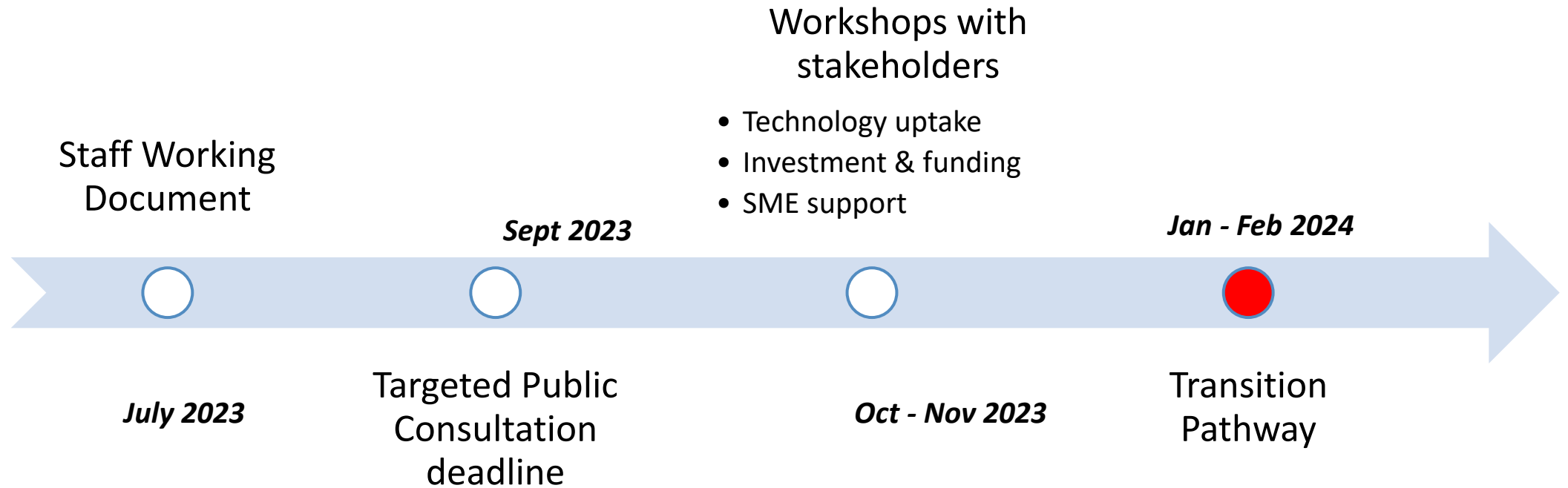
It is...

- ✓ a joint vision for the future of the EU agri-food ecosystem
- ✓ the result of a co-creation process among stakeholders
- ✓ a concrete and actionable plan for the resilience, sustainability and digitalization of the EU agri-food ecosystem

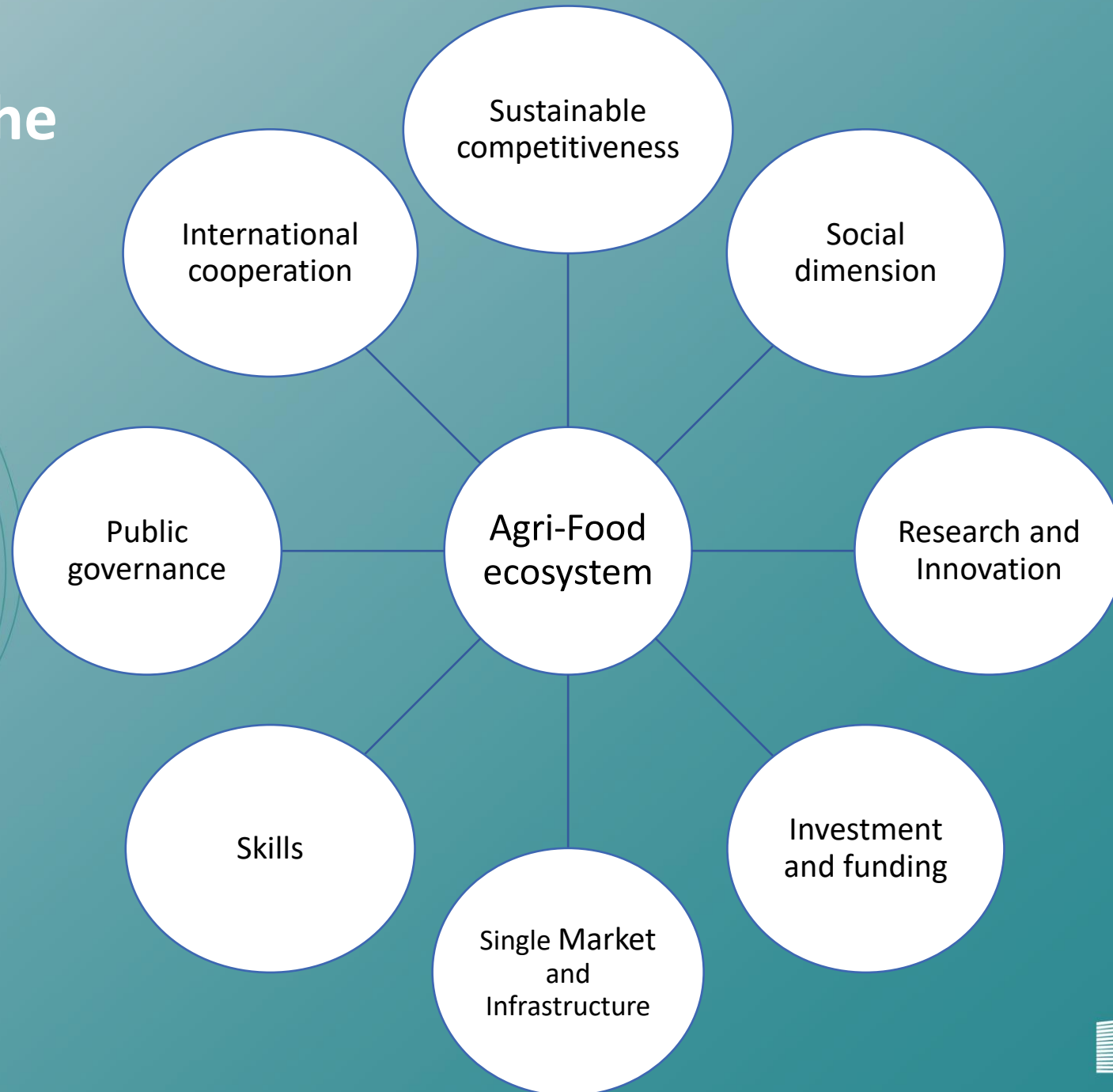
It is not...

- ✓ meant to substitute on-going work and consultations on legislative proposals and other policy action
- ✓ an assessment of existing legislation

Co-creation process of the Agri-Food Transition Pathway



Dimensions of the pathway



Sustainable Competitiveness

Food systems thinking

Sustainable and resilient food system

The Farm to Fork Strategy aims at transitioning towards a fair, healthy and environmentally friendly food systems

- Environmental sustainability
- Social sustainability
- Economic sustainability

Food security and resilience in the food system

International trade

Public governance

Mapping of all the relevant EU initiatives (no new propositions)

The Farm to Fork strategy remains the main EU policy framework for the transition to sustainable food systems (27 actions)

- Legislative Framework for Sustainable Food Systems (FSFS)
- EU Code of Conduct on Responsible Food Business and Marketing Practices

EU Common Agricultural and Common Fisheries Policies

Biodiversity strategy

Bioeconomy strategy

New industrial strategy

European skills agenda

Digital strategy

Social dimension

A just transition

Role of Corporate Social Responsibility (CSR)

Role of social dialogue (ESSDC)

Impact of food affordability, food prices and food insecurity

Healthy diets

Working conditions

Role of rural areas and cities on transforming food systems

Research and Innovation

Workshop 1: Uptake of digital technologies for a resilient and sustainable Agri-food industrial ecosystem (27 Oct)

Horizon Europe Programme

Horizon Europe Partnerships (mainly under Cluster 6) – Sustainable food systems partnership

Horizon Europe Missions (Healthy soil)

EIT-Food

EIP-AGRI (linked to CAP)

European Technology Platforms (ETP ‘Food for Life’, TP Organics)

EIC Pathfinder / Accelerator

S3 Platforms

TEFs – DG CONNECT

Investment and funding

Workshop 2: Investments and funding in the Agri-Food industrial ecosystem (9 Nov)

Mapping of available funding from EC Services (for agri-food)

Access to finance tools

DG AGRI Compass (Released on 12 October)

Private investment barriers

Mapping of EU Investment and funding opportunities

Programme	Lead EC Service	Definitions (2021-2027)	Quantities
CAP	AGRI	EAFRD + MS. Mostly agriculture	€ 35 billion
CFP	MARE	EMFAF + MS. Fisheries	€ 6.1 billion
Cohesion Policy Funds	REGIO	ERDF, CF, ESF, JTF. All sectors	€ 1.2 trillion (€ 7 billion)
ESF+	EMPL	Employment, education, skills. All sectors	€ 99.3 billion
RRF	MS / RECOVER	NextGeneration EU (Grants and loans). All	€ 0.7 trillion (€ 6.7 billion)
TSI	REFORM	Demand driven. All sectors	€ 0.86 billion
InvestEU	ECFIN	EIB Group (EIB+EIF). Access to finance. All	€ 26.2 billion
SMP / COSME	GROW / EISMEA	SMEs. All sectors.	€ 4.2 billion
Horizon Europe	RTD	Research and Innovation. All sectors	€ 95.5 billion (€ 9 billion)
HE Pillar 3	EIC	Innovation including scale up. All sectors	€ 10.1 billion
HE Pillar 3	EIT	EU + Private. R&I. Some sectors. EIT-Food	€ 3 billion (€ 431 million)
LIFE	ENV	Environment. Some sectors	€ 4.43 billion
Digital Europe	CNECT	Digitalisation. Some sectors	€ 7.59 billion
Erasmus+	EAC	Education and training. All sectors	€ 26.2 billion

Investment & Funding (consultation)

TOP INVESTMENT NEEDS

Research, development & innovation

Renewable energy

Decarbonisation

Circularity, efficient recycling & waste management

Transport & logistics infrastructure

Crisis prevention & measures

Digital infrastructure & technology

Skills, training & education

Market development & consumer education

Sustainable agricultural practices (e.g. regenerative agriculture)

Diversification of supply chains & dependency reduction

Working & employment conditions

Modernisation of real estate/facilities

Investment & Funding (consultation)

TOP BARRIERS

Limited resources & skills

High perceived risks by investors/funding bodies

Missing information on funding opportunities

Exclusion of agri-food sector from EU taxonomy

Strict requirements & burdensome application process

Strategic investment focus is not on agri-food

Low margins & limited capital

EU subsidies that jeopardise production or markets

High (initial) costs for new machinery & technologies

Short horizons and too high interest rates in financial instruments

Information asymmetry among players

Limited access to market information

Single Market and Infrastructure

Workshop 3: New Business models and support to SMEs for a resilient agri-food industrial ecosystem (14 Nov)

Single market tools:

Single Market Transparency Directive (SMTD)

Single Market Enforcement Taskforce (SMET)

Single Market Emergency Instrument (SMEI)

Food Security Crisis preparedness and response Mechanism (EFSCM)

EU's Digital Single Market Strategy

Skills

Agri-food Pact for Skills partnership

European Cohesion Funds (ESF+)

European Skills Agenda

European Year of Skills (EYS)

Agri-food Pact for Skills

International cooperation

UN Food Systems summit

UN Framework on Climate Change

Ministerial Conference of the WTO

Convention on Biological Diversity

Free Trade Agreements

Collaborations with: FAO, WHO, IFAD, UNEP, WTO, OECD, Codex Alimentarius Commission, World Organisation on Animal Health (WOAH) and the International Plant Protection Convention (IPPC)

Reflections

Ambitious targets that require further efforts on implementation

Map the still remaining gaps for implementation (enablers)

Co-implementation phase with the help of stakeholders

Role of the EU Code of Conduct on food business and marketing practices
(Stakeholders)

Role of Sustainable food systems partnership (Member States)

Synergies with other ecosystems

Specific support to SMEs

International angle

Next steps

Publication of Transition Pathway Q1 2024

Budget is allocated to create a Transition Pathway platform (DG GROW)

3 years – extendable to 6 years

Budget is allocated to support a contractor for development of contents (DG GROW)

2 years – extendable to 4 years

Alignment particularly with the EU Code of Conduct (DG SANTE)

Synergies particularly with the SFS Partnership and EIT-Food (DG RTD)

Synergies with other DGs to take into account (AGRI, ENV, EMPL, **MARE...**)

Synergies in the International dimension (INTPA, UN FS Summit platform)

Thank you for your attention

Questions?

