

## HEALTHY AND SUSTAINABLE FOOD



### 1. REGIONAL SPECIALISATION

<b>Characterization</b>	<p>The primary and transformation sectors together account for 7.5% of Navarra's GVA. GVA has been increase by approximately 15% over the period 2014-2019, slightly below the average of the rest of the sectors</p>
	<p>There are 28,700 jobs between the primary and transformation sector (9.2 % of regional employment). The primary sector in 2019 represented a production value of € 1,129 million of production, with 15,604 farms and 12,836 workers. In 2019, the transformation sector had 755 companies with € 4,536 M of production and 15,873 workers</p>
	<p>The transformation sector accounts for more than 11.8 % of the volume of exports in the region (€ 1,196 million exports). There has been a growth of close to 40 % in exports between 2014 and 2019 (above the average growth for Navarra's exports as a whole)</p>
	<p>By subsectors, vegetable production stands out (43 % of turnover). Among them, the frozen and ambient temperature companies are those with the highest aggregate turnover, but it is the IV-Range companies and the frozen ones that grow the most. They are followed by Meat and Oil, Wine, Bakery and Dairy</p>
	<p>As market niches, the high number of companies with prepared dishes (37) and with a gourmet strategy (142) stand out</p>
<b>Value chain</b>	<p><b>Companies:</b></p> <ul style="list-style-type: none"> <li>· Production Companies: Grupo AN S.Coop. Orbalaiz, S.Coop, Timac AGRO, ...</li> <li>· Processors: Berlys Corporación Alimentaria, Ultracongelados Virto, Congelados de Navarra, Viscofan, Florette (Vega Mayor), Agotzaina, Industrias Alimentarias de Navarra, Inter Malta, Iberfruta Muerza, Harivasa 2000, Agrozumos, Elaborados Naturales, Grupo APEX, General Mills...</li> <li>· Distributors: Eroski, Uvesco Group...</li> <li>· Auxiliary industry: Exkal, Urtasun workshops, Smurfit kappa ...</li> </ul>
	<p><b>Knowledge entities:</b> UPNA, University of Navarra, CNTA, INTIA, CIMA, IdAB...</p>
	<p><b>Collaboration entities:</b> NAGRIFOOD, ALINAR, INTIA, UAGN, EHNE, UCAN...</p>
<b>Emerging initiatives</b>	<p><b>Start-ups:</b> Feeding Sanygran, Cocuus, Nutrinsect, Nucaps, Nulab, Greentech, Nutrition 3g, MOA Foodtech, Innomy Biotech, Ingredalia...</p>
	<p><b>Projects:</b> PROTEVEG, vegetable protein production; NUTRIBIOTA smart food and ingredient design; NUTRI + improve nutrition for the elderly; ALINFA healthy eating for children under 12 years; BIOFOOD and BIOVID, application of biotechnology to fermented ingredients and vine control; IRIS IAFOOD, monitoring and quality control in food manufacturing; ALISSEC, design of healthy and sustainable food and ingredients based on the circular economy...</p>
<b>International collaboration</b>	<p>GEX Bionavarre</p> <p>Foodtemic network</p> <p>Partnership Sensorial Smart 4 Systems agrifood</p> <p>Partnership Traceability and Big Data (applications in agrifood)</p> <p>Partnership Nutritional Ingredients</p> <p>Partnership European Food Packaging Platform</p> <p>EIT FOOD</p> <p>ERRIN – Food in regions</p> <p>VANGUARD Initiative</p> <p>Bioeconomy Platform (BIC)</p>

## 2. STRATEGIC VISION

### Vision 2030



Navarra is a reference region within Europe for healthy and sustainable food, especially vegetables; developing high quality products, and harnessing and respecting the natural resources of the territory.

#### FOCUS



- New plant-based products
- Development of alternative proteins
- Industrialisation of organic production
- Recovery of by-products

### Trends

There are 4 main levers of innovation in the agri-food sector that can be combined with each other to generate differentiations: sustainability and circularity, health and well-being, pleasure and usefulness

45 % of Spaniards demand healthier products. The so-called "Clean Labels" are growing

Decrease of the consumption of animal protein, either because it is considered less healthy, for sustainability or for animal dignity. Instead, new alternative proteins are being developed

In Spain, the consumption of organic products grows by over 20 % annually and has a wide margin of growth compared to other countries

Important growth in consumption of refrigerated prepared meals, Meal Kits and ethnic food (mainly Mexican and Asian food and in Preparation Kits format)

Sales of gourmet products grew 6 %, twice the growth of conventional products

Although it still represents a very low share, online shopping continues to grow steadily (20 %)

Tendency to local, seasonal and nearby consumption

Consumption outside home is gaining share over consumption inside home

The number of new product launches increases year by year, highlighting the launches with a focus on ecological and health

### International Line-up

The European 'Farm to Fork' strategy aims to accelerate the transition to a sustainable food production system that encourages the primary production, manufacturing and distribution processes as well as the consumption of food in households to be sustainable, as at the same time, act in a preventive way to avoid the loss of food and the reduction of food waste

The European Commission will take measures to reduce the risk of chemical pesticides and fertilizers with the goal of achieving 25 % of organic agricultural soil by 2030

The Commission will propose the standardisation and use of labels that certify products made with sustainability and nutrition criteria

The European Commission's Horizon Europe funding program aims to accelerate the green and digital transition. The Cluster 6 research program will contribute to the development of the objectives of the 'Farm to Fork' strategy, ensuring people's food and nutrition

Related SDGs:



### 3. LINES OF WORK

Lines of work		BO	GT	DT
01	New plant solutions, convenient, affordable, and readily available	●		
02	Development of plant-based protein and other alternative proteins	●		
03	Recovery of by-products and waste to produce new products, either end products or ingredients	●	●	
04	Development of healthy, functional foods, and advances in personalised nutrition	●		
05	Promotion of organic production and its industrialisation in agri-food enterprises	●	●	
06	Promote the consumption and exploitation of local products, with high added value, closely linked to the territory	●	●	
07	Focus on natural foods that require little processing and less treatment	●	●	
08	Sector commitment to natural resources: lower water consumption, reduction of fertilisers, phytosanitary products...		●	
09	Extend the shelf life of food to avoid food waste	●	●	
10	Development of precision farming. Sensing and remote detection for crop management	●	●	●
11	Development and implementation of new technologies to ensure food safety and traceability	●		●
12	Evolution of online sales channels and consumer engagement	●		●

**Note:** BO: Business Opportunity GT: Green Transition DT: Digital Transition

### 4. TECHNOLOGICAL SKILLS

Soil and crop protection	Cover crops, soil agroecology, phytopathology, bio-insecticides and fertilizers
	Omics technologies for the identification of microorganisms in soils
Precision farming	Sensorisation of agronomic variables
	Predictive models in agriculture based on Artificial Intelligence
	Remote sensing data platform
Processing and preservation technologies	Advanced preservation technologies
	Innovative processing technologies
	Canned products without additives
Food safety	Biosensors
	Automatic traceability
	Imaging technologies: Hyperspectral, UV, etc.
	Specialized analytical techniques
Functional and personalised food	Industrial microbiology: probiotics, prebiotics, new ingredients
	Consumer / supply relational platforms
	Customized nutrition
Sustainable packaging	Edible packaging
	Biodegradable packaging