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# **Policy Seminar**

**Brussels  
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**Cursus:**

**ESSEC Business School**

**Lesaffre Nutrition and Health CEO: 2006- 2008**

**Président de Novasep Process ( Applexion) : 2008 – 2012**

**CEO de Lesaffre: 2012 – 2021**

**Aujourd'hui:**

**Board Member Agronutris**

**Board member Eurolysine**

**Chairman Bon Vivant**

**Chairman Macopharma**

**President Ferments du Futur**

**VP Innovation ANIA**



**Lesaffre :**

**2,7 Mrds € - 11000 personnes – 77 Usines**

**X 2 from 2012 to 2021**

**Mission:**

**Working together to better feed and protect the planet**

# ANIA, the French food federation

***ANIA is the association representing the French Food Industry (19 000 companies).  
First industrial sector in France with a turnover of 212 billion Euros.***

## Our missions :

### Promote

Promote food companies and their employees who are committed every day to offering healthier food, safer, more sustainable and accessible to all



### Join forces

ANIA gathers 17 regional associations and 32 sub-sectors of the Food industry: processed meat products, dairies, soft drinks, ...

### Support

Support food companies in their efforts for sustainability and innovation.

# Food Industry Actors are facing huge investments challenges with Declining cash flows

- A very fragmented industry ( France: 19 000 companies – 3 000 with sales above 100 Mi €)
- High price pressure linked to consumer preferences and competition in distribution
- Recent inflation on costs, followed by a stable pattern
- Decreasing cash flows
- A high dependence on refinery Gaz as an energy source
- Large pattern of companies:
  - Energy Intensive : Sugar, Starch, Milling, Milk industry,
  - Scattered energy sensitive : other sectors
- Life cycle analysis demonstrate a large prevalence of scope 3 in the CO2 Emissions balance



# Means and levers to achieve the objective to reduce emissions :

## An industry perspective

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- Incremental process energy efficiency, eg heat recovery, MVC, calorifuges, etc...
- Breakthrough process innovation targeting sober new transformation processes
- Breakthrough innovation in new food products at reduced CO2 impact ( eg alt. proteins)
- Fossil Fuels substitution
  - Biomass ( energy wood)
  - Green Electricity
  - Methane from wastes methanisation
  - ...
- Drastic reduction of HFC in the cold chain



# In order to execute the transition successfully, a combination of intense efforts in R&D, Financing and regulatory pragmatism is needed

## R&D:

- Improve current technology to achieve emissions reductions
- Improve green energy production technologies to increase attractiveness
- Create new breakthrough frugal transformation processes for existing products
- Create new breakthrough frugal foods
- Investments in Food Tech in 2021:
  - US 3,5 Bi\$,
  - Europe 0,5 Bi\$



**In order to execute the transition successfully, a combination of intense efforts in R&D, Financing and regulatory pragmatism is needed**

## **Regulatory:**

- Alternative energies: Keep a stable frame for the utilization of methane from residues or direct uses of residues as energy sources
- Innovative products or solutions :Design regulations to accelerate the time to market of CO2 emission reducers ( EG: Biocontrol, Biostimulants, alternative proteins)

Time to Market		
	Europe	USA
Crop Protection	3 to 5 years	2 years
Novel Food	3 to 5 years	1 year ( GRAS)

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## **Industrial Investments**

- **French Example:**

40 % reduction of CO2 Emissions from 2015 to 2030

➔ 4,5 to 5,2 Bi € Investment need

The cash burn challenge is inaccessible for many food companies,  
Given their current situation.

- **Need to accelerate investments pay backs**

- cost reduction in alternative energies
- accelerated Industrial permitting
- accelerated times to market ( Novel Food, Crop Protection, etc...)

- **Need of strong support in financing from governments and EU.**

**Only a mix of these measures will create a positive momentum**

