Public-private collaborations for innovation in Agrologistics

Topsector Agri&food - International

22nd of June 2022 – Bas Hetterscheid
Sustainable flower transport Kenya

3 days

40 days
Piloting within Seed Money Project

- Harvest, processing, packaging at farms
- Truck to Nairobi
- Vacuum cooling, reefer loading
- Transport in reefer
- Reefer on vessel
Public Private Partnership
From idea to PPP – Kenyan flowers

Ideas for sustainable flower transport

2021: Seed Money Project (€40k)

2022-2024 Public Private Partnership (€720k)
Internationale Strategie: Uitgaan van kracht

Climate Smart Farming and Sourcing (incl agrologistics)

Zero Waste Agriculture
International strategy TopSector

- Development international Knowledge and Technologies on circular, climate, safe & healthy food:
  - Trade-flows to NL (import/re-export)
  - Export of technology & knowledge (localize solutions)

- Improve position of the Netherlands & Dutch companies
Pipeline of future innovations

Sustainable organic limes from Colombia

Improved Coffee fermentation Kenya

Ideas for sustainable production & sourcing

2022: Seed Money Project (€40k)

Public Private Partnerships

Healthy drinks from cacao pulp - Ecuador

Source: https://topsectoragrifood.nl/kaart/
Agrologistics sector study
Agrologistics sector study
### Mapping agrologistics sector

<table>
<thead>
<tr>
<th>Activities based on definition (in scope)</th>
<th>Sub-segments agrosector: suppliers of enabling technology, products &amp; services</th>
<th># Companies (interviewed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport (Distribution, Transhipment) Storage</td>
<td>Transport and storage technology</td>
<td>29 (2)</td>
</tr>
<tr>
<td>Conditioning (ripening)</td>
<td>Air conditioning and cooling technology</td>
<td>73 (3)</td>
</tr>
<tr>
<td>(Re-) Packaging, Labelling, Pricing</td>
<td>Sorting and packaging technology</td>
<td>31 (3)</td>
</tr>
<tr>
<td></td>
<td>Packaging materials</td>
<td>18 (5)</td>
</tr>
<tr>
<td>(Re-) Processing</td>
<td>Product processing &amp; handling technology</td>
<td>48 (5)</td>
</tr>
<tr>
<td>Management / Control / Organization</td>
<td>Quality Control services</td>
<td>9 (4)</td>
</tr>
<tr>
<td></td>
<td>IT and data solutions for infrastructure and connectivity technology</td>
<td>7 (2)</td>
</tr>
<tr>
<td></td>
<td>Training and advice</td>
<td>14 (1)</td>
</tr>
</tbody>
</table>

Identified 200+ companies, including start ups

Interviewed 25 companies and 15 organisation in ecosystem
The ecosystem

**Agrocomplex**
- Long history of local production and value-added activities
- Presence of the manufacturing sector (agro-food production, technology)
- Important trading position

**Agrologistics**
- Geographical clustering of agro-related stakeholders (e.g., Greepports)
- Agro-related innovation on technologies, services & products
- Mindset: the entire chain permeated by the agro-product

**Dutch diamond**
- Culture of collaboration (within & between sectors, national & international, PPP)
- Presence of knowledge and innovation in the field of production, technology, and logistics (transport, preservation, and conditioning)
- High level of Dutch agro and logistics education that also affects the business world (e.g., via Top Sector)
- Fiscal and business environment / Ease of doing business

**Central location**
- Excellent connectivity
- Excellent in- & outbound infrastructure
- Pro-business attitude of customs & phytosanitary services

**Value added logistics for Agri & Food**
- High quality & competitive costs driven by efficiency
- High concentration of facilities (cold storage, ripening, packing, ...)
- Entrepreneurial strength at SMEs with an international perspective, including start-ups
Agrologistics tech sector
#1 postharvest research facility in the World

https://www.youtube.com/watch?v=e3B51uGDrEc
## International opportunities

### Identified by the sector itself

#### Apple & berry sector in Eastern Europe & STAN-countries

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Regions</th>
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<tbody>
<tr>
<td>Moving from low to high tech</td>
<td>North Africa, Latin America and Asia</td>
</tr>
<tr>
<td>Large producing countries</td>
<td>Eastern, Western &amp; Southern Europe, emerging countries</td>
</tr>
<tr>
<td>Product specific developments</td>
<td>Latin America (Fruits and vegetables)</td>
</tr>
<tr>
<td></td>
<td>Africa (Dairy sector)</td>
</tr>
<tr>
<td>Countries where labour becomes more expensive /</td>
<td>Developed countries and emerging countries</td>
</tr>
<tr>
<td>scarce</td>
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</tbody>
</table>

*Tropical fruits from Peru, Colombia, Chili*

*Dairy sector in Kenya*

*Very limited interest in low income countries (small farmers)*
International opportunities

Arch cold solutions East Africa Fund
US$83 million

Cold Chain development in Rwanda, Guatemala, Argentina, Mali and Kenya US$350 million

Program on temperature controlled logistics for private sector investment

Developing private sector led cold chain opportunities in Africa
International competition

UK Industry & Government are better aligned

Cold chain knowledge centre investments:
• $3.3 million in Rwanda
• $2.1 million in India

USA Industry has strong alliance

Lot of funding through USAID, USDA, USTDA, exclusive for American organisations

What is your next step in innovating internationally together?
Workshop:
NL'se agrologistieke sector en exportkansen
7 juli, 13.30 - 17.30 uur

https://www.rvo.nl/evenementen/workshop-agrologistieke-sector-exportkansen
Active approach to investment opportunities

Strategische Meerjarige Marktbewerking (SMM) on postharvest in ASEAN-3

Export of technologies & knowledge

Envisioned start: Q3 2022 (with FME)
Still some spots available for interested companies

And other schemes (DHI, PIB, DRIVE)
# Topsector support

<table>
<thead>
<tr>
<th>Mechanism</th>
<th>Description</th>
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<tr>
<td>Trade missions &amp; fairs</td>
<td>Opportunity identification</td>
</tr>
<tr>
<td>Seed Money Project</td>
<td>Innovative &amp; international collaboration for consortium (opens end this year)</td>
</tr>
<tr>
<td>Public-private partnerships</td>
<td>Consortium collaboratively doing R&amp;D to stimulate more sustainable trade to NL or export of Dutch tech &amp; knowledge</td>
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</tbody>
</table>
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What is your next step in innovating internationally together?
Thanks for your attention!

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