

## Dutch Potato, Road to Success

# GMV

Dutch Manufacturers of Machinery for  
Food Processing and Packaging

Jan Hak, president



Orange Potato Partner Meeting, The Hague / Voorburg  
13 October, 2011

## 荷兰马铃薯产业发展 与中国的合作

# GMV

荷兰食品加工和包装机械制造和生产

杨·哈克 协会主席

荷兰食品加工和包装机械协会GMV



## Potato Industry in The Netherlands, cooperation with China

### Contents:

- GMV Association
- The Netherlands
- Potato in The Netherlands
- Key Trends
- GMV in China
- Ambition
- Vision



## 荷兰马铃薯产业发展 与中国的合作

### 主要内容:

- GMV食品加工包装机械协会
- 荷兰现状
- 荷兰的马铃薯产业现状
- 关键趋势
- GMV协会在中国
- 发展雄心
- 未来展望



**GMV**  
**Association**

**Central platform for agri-food processing machinery**

*Potatoes, fruit, vegetables, feed, meat, fish, dairy, bio-based products, etc.*



**GMV**  
**荷兰食品加工及包装机械协会**

**食品加工行业中心及行业园地**

协会成员们大部分集中在食品加工包装机械设备行业

详细来说包括大多数的食品领域：  
肉类，鱼类，蔬菜类，马铃薯类，水果类，乳制品类等



## GMV - 1<sup>st</sup> Dutch Potato Technology Mission

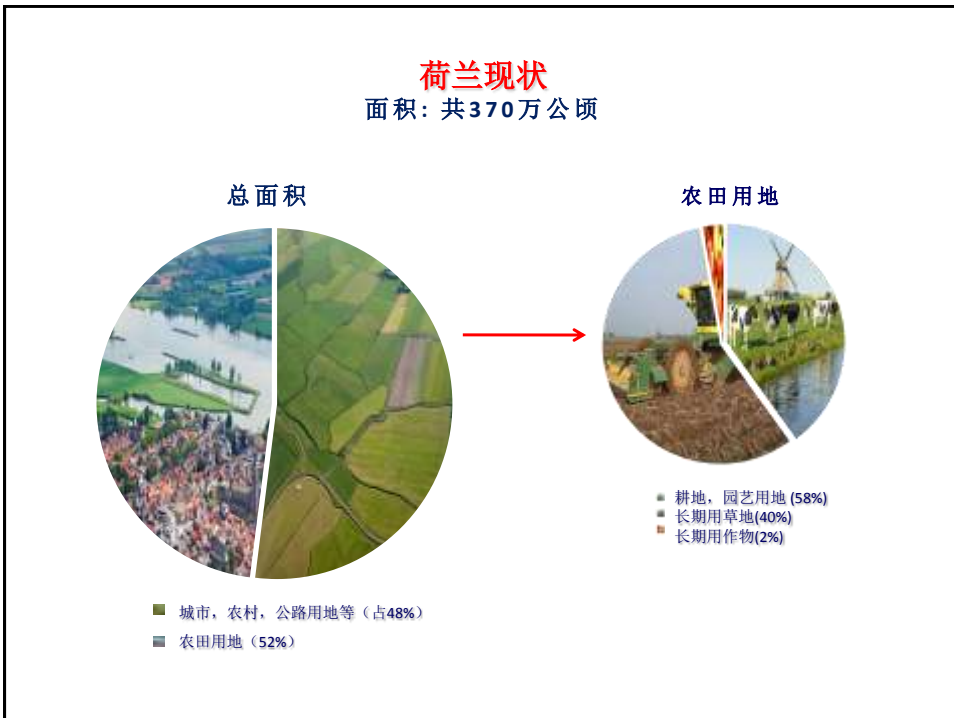
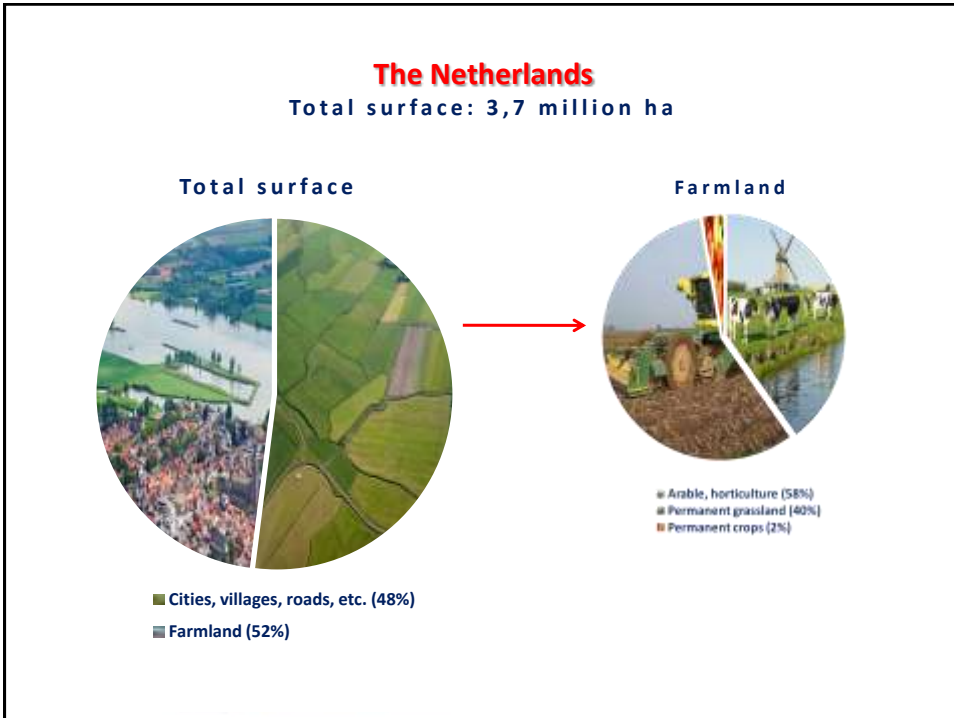
25 Year joint focus

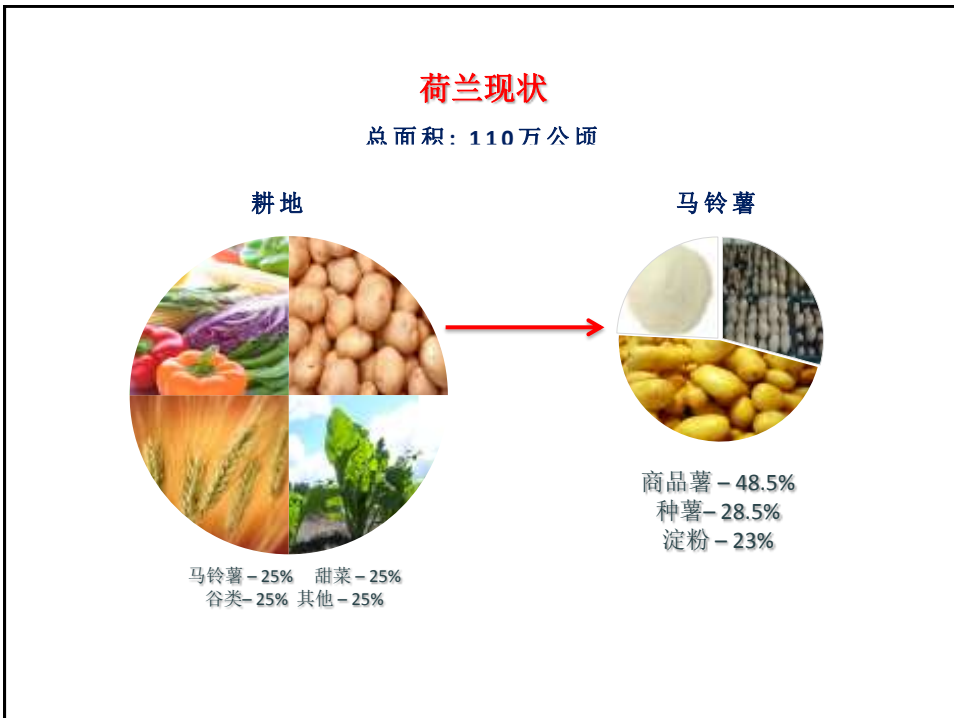
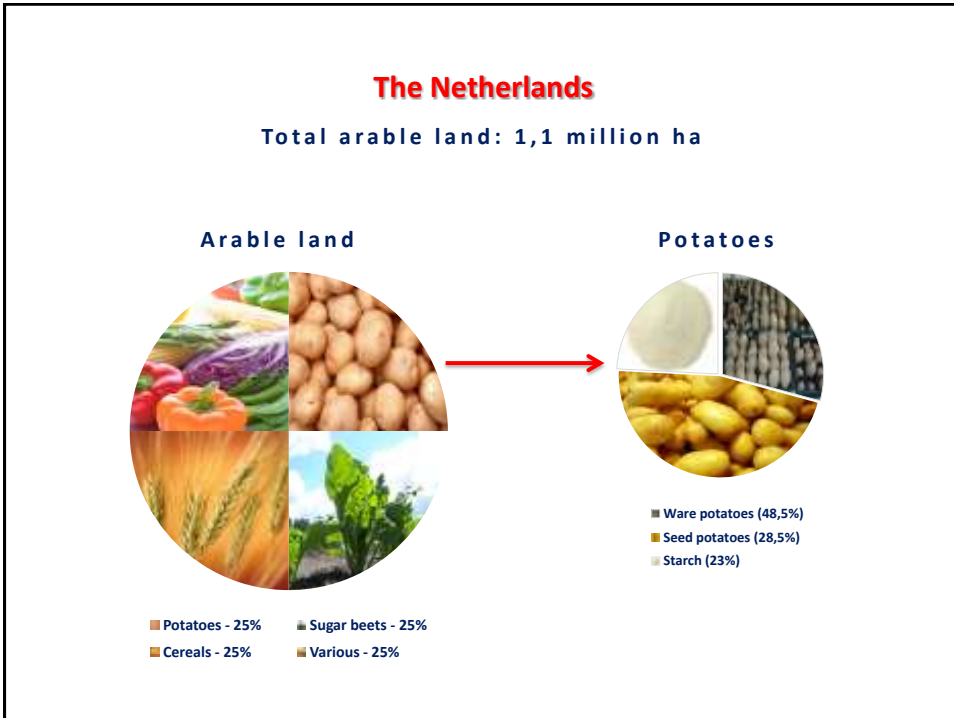


## GMV协会 - 第一届荷兰马铃薯技术代表团访问中国

25年来中荷之间的友好往来与紧密合作









## The Netherlands as 'Food Valley'

Home country of World Leading Food companies

- EUR 68 billion turnover (2010) in agri-food products
- World leading country in food production
- 4.150 Companies - 137.000 staff (2008)
- One of every six employees works in the food-industry
- 80% Turnover comes from large companies
- An average business consists of 26 labour years and a turnover of EUR 13 million



## 荷兰被认为是‘食品峡谷’

世界知名领先食品公司的所在地

- 2010年，农业食品产品的销售额已达到680亿欧元
- 据2008年统计，世界知名领先食品公司（包括马铃薯种植和加工行业）约有4150家，共计13.7万名员工
- 每6个工作的人里面就有一个是从事食品行业工作的
- 80%的销售额是来自大型企业
- 平均计算，相当于每个公司至少有26名全职员工，全年工作；各平均拥有1300万的年销售额



## The Netherlands as 'Food Technology Valley'

Home country of World Leading Food Technology companies

EUR 3,3 billion turn-over (2010) in processing equipment and research

- 80% Poultry systems
- 70% Cheese systems
- > 50% Potato systems
- Etc.



## 荷兰被认为是‘食品技术峡谷’

世界知名领先食品技术公司的所在地

据2010年数据，食品加工及研发机械设备的销售额在33亿欧元，在世界范内：

- 80%的家禽肉制品加工系统设备是荷兰生产的
- 70%的奶酪加工系统设备是荷兰生产的
- > 50%的马铃薯加工系统设备来自荷兰厂商
- 其他...





## Potato Area in The Netherlands

Total 175.000 ha

Ware Potatoes  
85.000 ha (48,5%)



Seed Potatoes  
40.000 ha (28,5%)



Starch Potatoes  
50.000 ha (23,0%)



## 荷兰马铃薯产业现状

目前有17.5万公顷全部用于马铃薯种植

马铃薯  
85.000 公顷 (48,5%)



种薯  
40.000 公顷 (28,5%)



马铃薯淀粉  
50.000 公顷 (23,0%)



## Potato Production in The Netherlands

Every year: 8.000.000 ton

Fresh potatoes  
1.000.000 (ware)



Ingredients for industry  
2.500.000



Processed consumer products  
4.500.000



## 荷兰马铃薯产业现状

每年平均生产马铃薯8百万吨

鲜食马铃薯  
1.000.000 吨



加工用马铃薯  
2.500.000 吨



其他马铃薯深加工消费食品  
4.500.000 吨



## Potato Quality in The Netherlands

Excellent due to:

- Strict quality inspections
- Presence of first-rate knowledge, in various research institutions and hundreds of 'growers' study clubs
- Innovation!



## 荷兰马铃薯产业现状

荷兰马铃薯品质优异，主要因为：

- 严格的质量监督
- 拥有最先进的知识及各种专业化的研究机构以及数百个种植户的交流俱乐部
- 保持创新研发的发展理念！！



## “Chain” Innovations from The Netherlands

**Seed Potatoes, genomics**  
Clean room systems, gen technology



**Cultivating**  
Drip irrigation, crop rotation, management



**Harvesting**  
Low damage lifting and handling



## 荷兰马铃薯产业现状

**种薯, 基因研究**  
无菌环境准备技术, 基础设施改良



**种植技术**  
滴灌, 作物轮作, 干旱和半干旱地区技术



**收获**  
降低收割及装载时的损伤



## “Chain” Innovations from The Netherlands

### Storage

Storage climate control, conditioning



### Processing

Energy, efficiency, by-products, waste



### Packaging, distribution

CO<sup>2</sup> footprint, cross docking, MFS



## 荷兰马铃薯产业现状

### 仓储技术

仓储温控技术，以及控制系统



### 加工技术

充分利用能源，副产品研发，废物利用



### 包装及物流配送

低碳概念，交叉配送，MFS网络系统



## Focus Points for “Innovation”

World leader in R&D and Training

- Economically and efficiently production of sufficient, safe and nutritious food
- Sustain and enhance natural resources
- Maintain viable farming enterprises and contribute to sustainable communities
- Meet cultural and social demands of society



## 荷兰被认为是‘先进技术创新中心’

世界领先的研究及培训系统

- 经济，高效地生产优质，安全，营养的高品质食品产品
- 可持续发展的同时加强对自然环境和资源的保护
- 在保证农场及公司正常运营的条件下，需要培养环境保护意识及可持续发展的思想
- 满足社会文化的发展要求





**Focus Points for "Innovation"**  
World leader in R&D and Training

Precision agriculture	
Potato genomics	
Advanced processing and logistics	



**荷兰被认为是 '先进技术创新中心'**  
世界领先的研究及培训系统

紫外线对作物的保护 减少杀虫剂侵害	
马铃薯基因改良	
先进的加工，物流配送	



**Focus Points for "Innovation"**  
World leader in R&D and Training

Nutrition and health	
Sensory and structure	
Bio ingredients and functionality	



**荷兰被认为是 '先进技术创新中心'**  
世界领先的研发及培训系统

营养学与健康饮食	
感官及结构	
有机食品成分及其高效用	



## The Netherlands as “Seed Source”

Home country of World Leading Companies for seed potato export

The Netherlands exports to countries world-wide



## 荷兰被认为是“种源之谷”

世界马铃薯种薯出口领先公司所在地

荷兰的马铃薯种薯遍布全球各地



### Key Trends

- Product diversification
- Health and Nutrition
- Energy and Environment
- Globalization



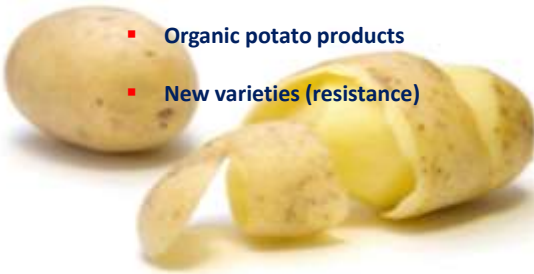
### 关键发展趋势

- 产品多样化
- 健康和营养
- 能源与环境
- 国际化



## Energy and Environment

- Supply chain integration
- Low carbon footprint
- Local sourcing of Potatoes
- “Controlled” potato cultivation
- Reduction in use of pesticides
- Organic potato products
- New varieties (resistance)



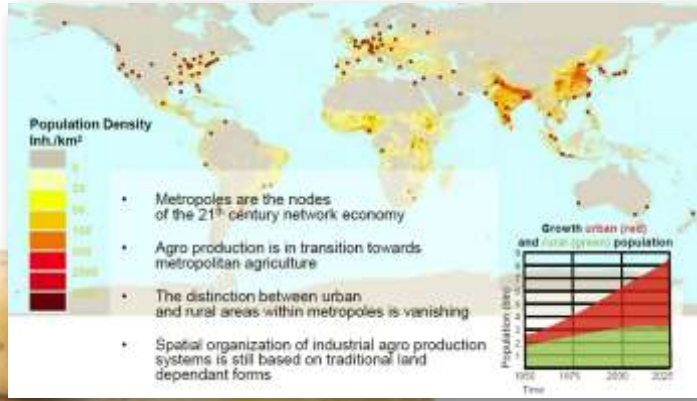
## 能源与环境

- 综合供应链
- 低碳概念
- 本地马铃薯供应源
- “可控”的马铃薯种植系统
- 减少杀虫剂的使用
- 有机马铃薯产品
- 新品种（抗病品种）



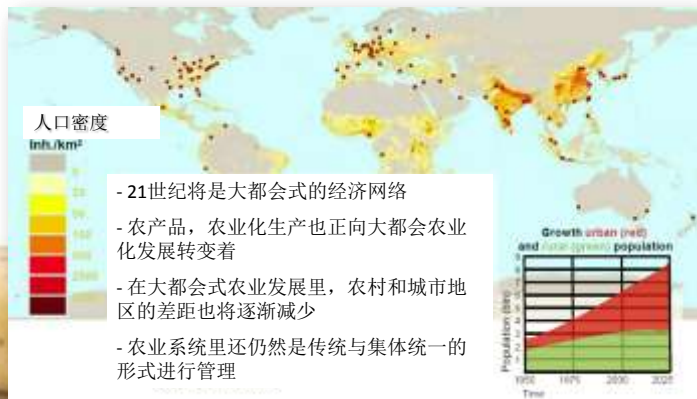
## Globalization

The world is urbanizing

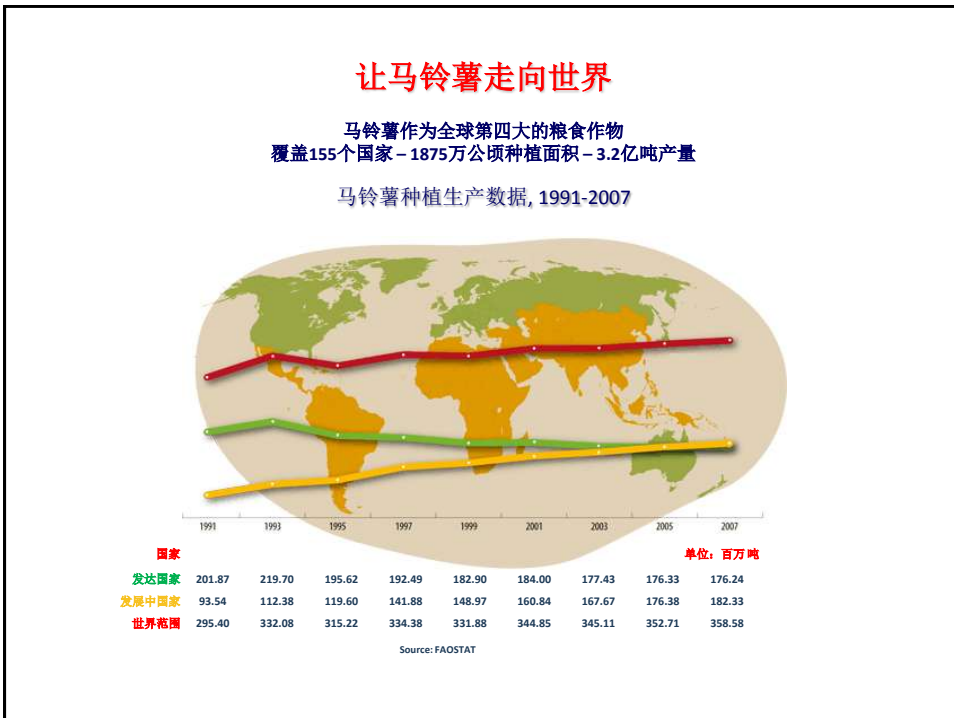
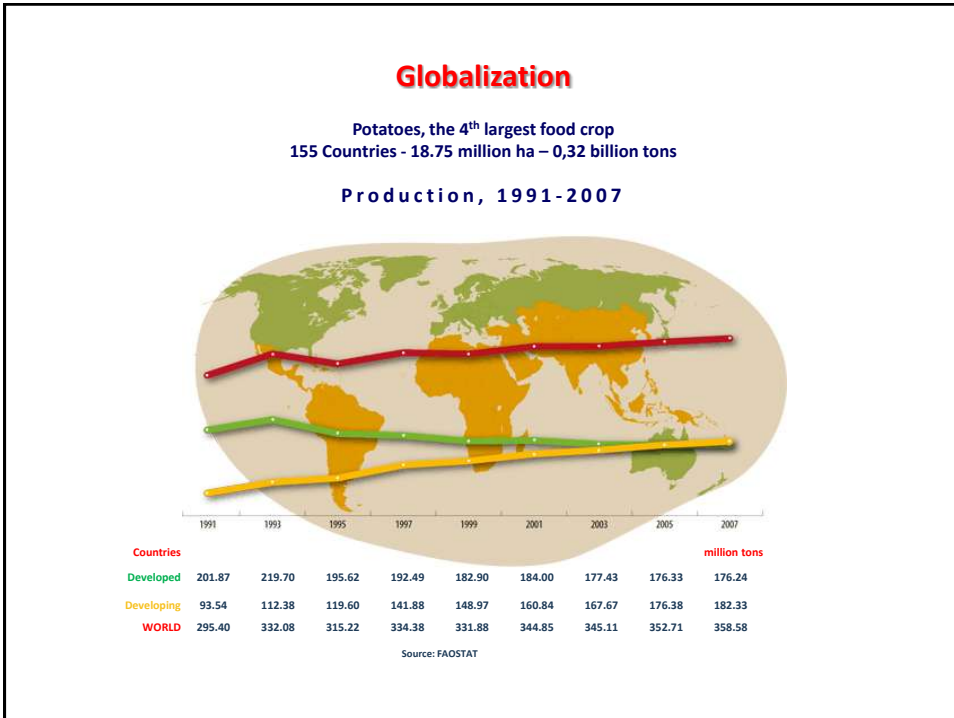


## 让马铃薯走向世界

世界正在向城市化发展

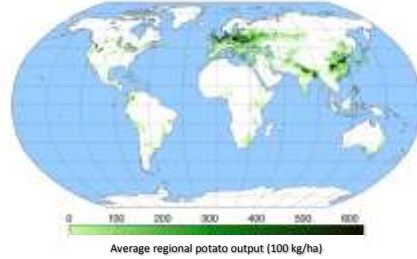






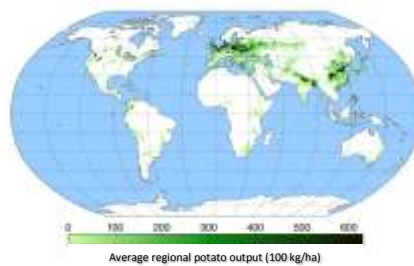
## Globalization

- Growing importance of China and India, South America (demand outside Europe doubled in 10 years)
- Global shift in consumption of potato and potato products
- Impact of new countries on potato supply and demand
- Equipment manufacturers and system integrators, acting global
- Increased competition: buying power major retail and QSR chains
- Outsourcing



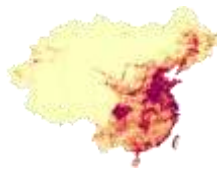
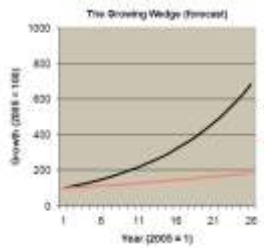
## 让马铃薯走向世界

- 对于中国，印度以及南美来说，国际化发展是非常重要的（在过去10年间，欧洲之外的国家需求增加了2倍）
- 世界马铃薯和马铃薯产品的消费状况发生着转变
- 新的一些国家对马铃薯供应及需求产生了一定影响
- 国际化的设备生产商，以及系统供应商，均以国际化的形式活跃在世界市场上
- 日益剧烈的竞争：主要购买力集中在零售商及QSR（质量体系规范）链
- 向外国采买进口



## Globalization

China's agricultural growth lags behind on economic growth



Population density



Suitability for agricultural production

Light Green	0 - 10
Medium Green	10 - 20
Dark Green	20 - 30

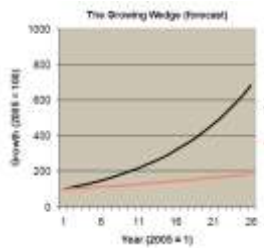
Total area suitable for agricultural production: 11%

Jump in agricultural productivity is necessary to meet growing demand of middle class. Still, there will be growing import of agricultural products.



## 让马铃薯走向世界

中国的农业增长滞后于经济增长



人口密度



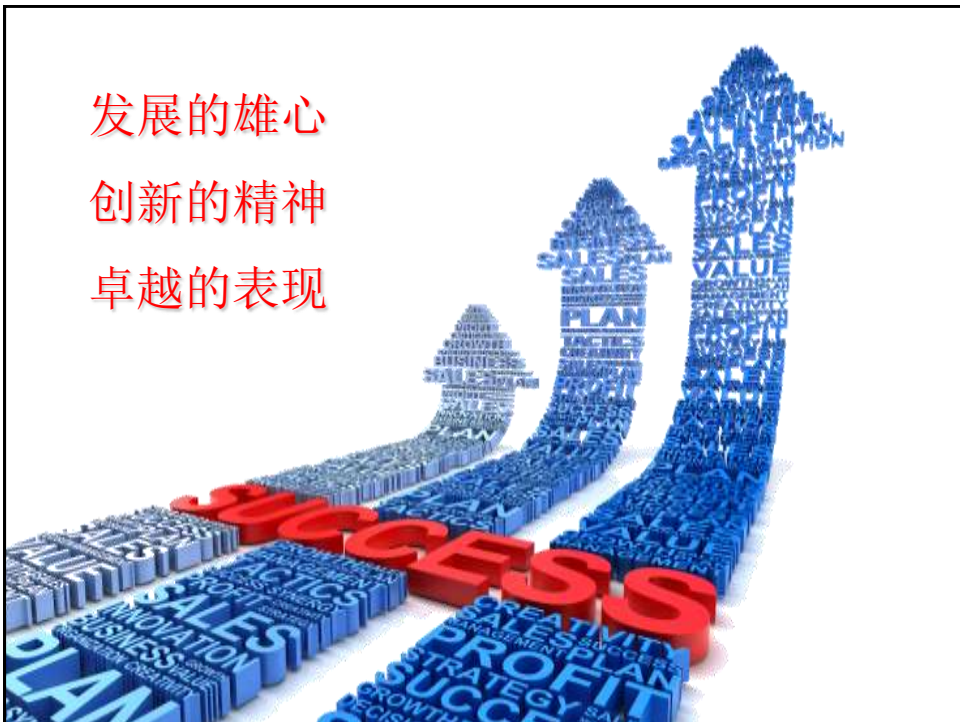
适合农业生产的区域

Light Green	0 - 10
Medium Green	10 - 20
Dark Green	20 - 30

适宜农业生产面积11%

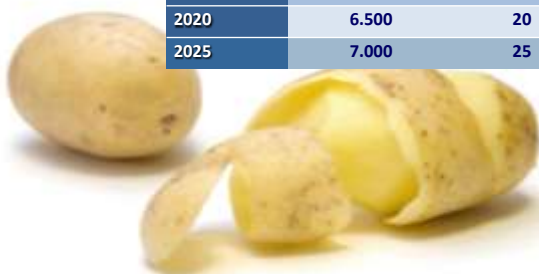
农业生产力的跳转是必要的，以满足日益增长的中产阶级的需求。不过会有越来越多的进口农产品加入到市场行列中来





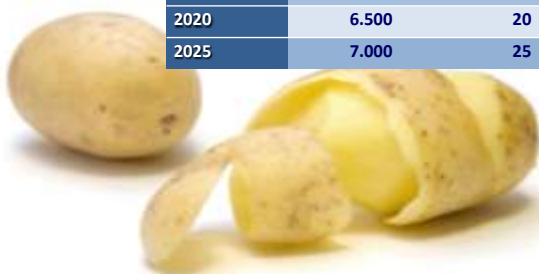
### Ambition - Potato Production

Year	Ha (*1.000)	Yield (Tons/ha)	Production (tons*1million)
1970	2.000	10	20
1980	2.300	11	25.3
1990	2.850	12	34.2
2000	4.700	13	61.1
2005	5.000	14.5	72.5
2010	5.500	15	82.5
2015	6.000	17.5	105
2020	6.500	20	130
2025	7.000	25	175



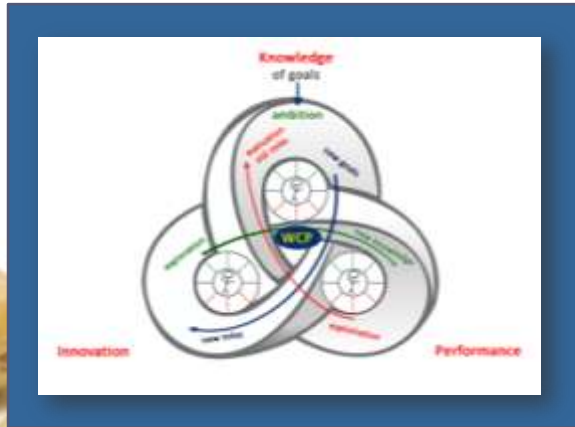
### 发展的雄心 — 马铃薯种植生产

年份	公顷 (*1.000)	产量 (吨/公顷)	生产 (吨*1百万)
1970	2.000	10	20
1980	2.300	11	25.3
1990	2.850	12	34.2
2000	4.700	13	61.1
2005	5.000	14.5	72.5
2010	5.500	15	82.5
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2020	6.500	20	130
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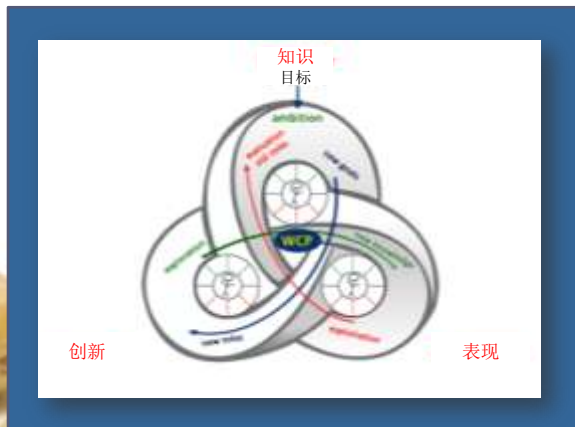
## Innovation - Human Capital

The most important asset!



## 关键点在人才

最重要的是目前所拥有的人才





## Performance

### “Our (sweet) Potato”

- World class showcases in sustainable development (efficiency of land, energy, water and material utilization)
- Driver for economic development through innovative food production
- Maximizing synergies between rural and urban development
- Lead the way for long term food security



## 未来展望

### “美味”马铃薯

- 世界范围内可持续发展（土地效率，能源，水源以及原料的正确利用）
- 经济发展及食品产品创新的推动力
- 乡村和城市发展相结合，最大限度地发挥两者协同增效发展
- 为中国食品安全长期发展指明方向



**8 x P = Success**



- People
- Plan
- Performance
- Pro-active
- Professionalism
- Positive attitude
- Planet
- Prosperity

**8个成功的关键**



- 人员
- 计划
- 表现
- 向前看的心态
- 专业
- 积极的态度
- 稳定的情绪

*Thank you !*

For more information, please visit our website:

**GMV**

[www.gmv-fme.nl](http://www.gmv-fme.nl)



谢谢 !

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