

“Boeren we allemaal Bio in 2050?”

Bio: Markt, Beweging, Groei en Consolidatie



Ronald van Marlen- Gent- 14 januari 2019

Statement 1:

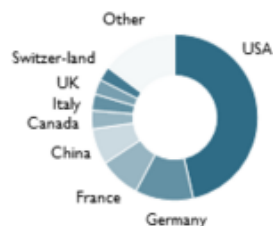
Biologisch groeit verder,
en dat zal niet stoppen



ORGANIC RETAIL SALES 2016

World
over
80 billion €

The largest single market is the USA followed by the EU (30.7 billion €) and China. By region, North America has the lead (41.9 billion €), followed by Europe (33.5 billion €) and Asia.



Distribution of retail sales value by country 2016

North America
almost
42 billion €

The countries with the largest market for organic food are the United States (38.9 billion €), followed by Germany (9.5 billion €), France (6.7 billion €) and China (5.9 billion €).



The five countries with the largest markets for organic food 2016

274€
are spent per
person in
Switzerland

Switzerland has the highest per capita consumption worldwide, followed by Denmark and Sweden.



The five countries with the highest per capita consumption 2016

9.7%
of the
food market
in Denmark is
organic

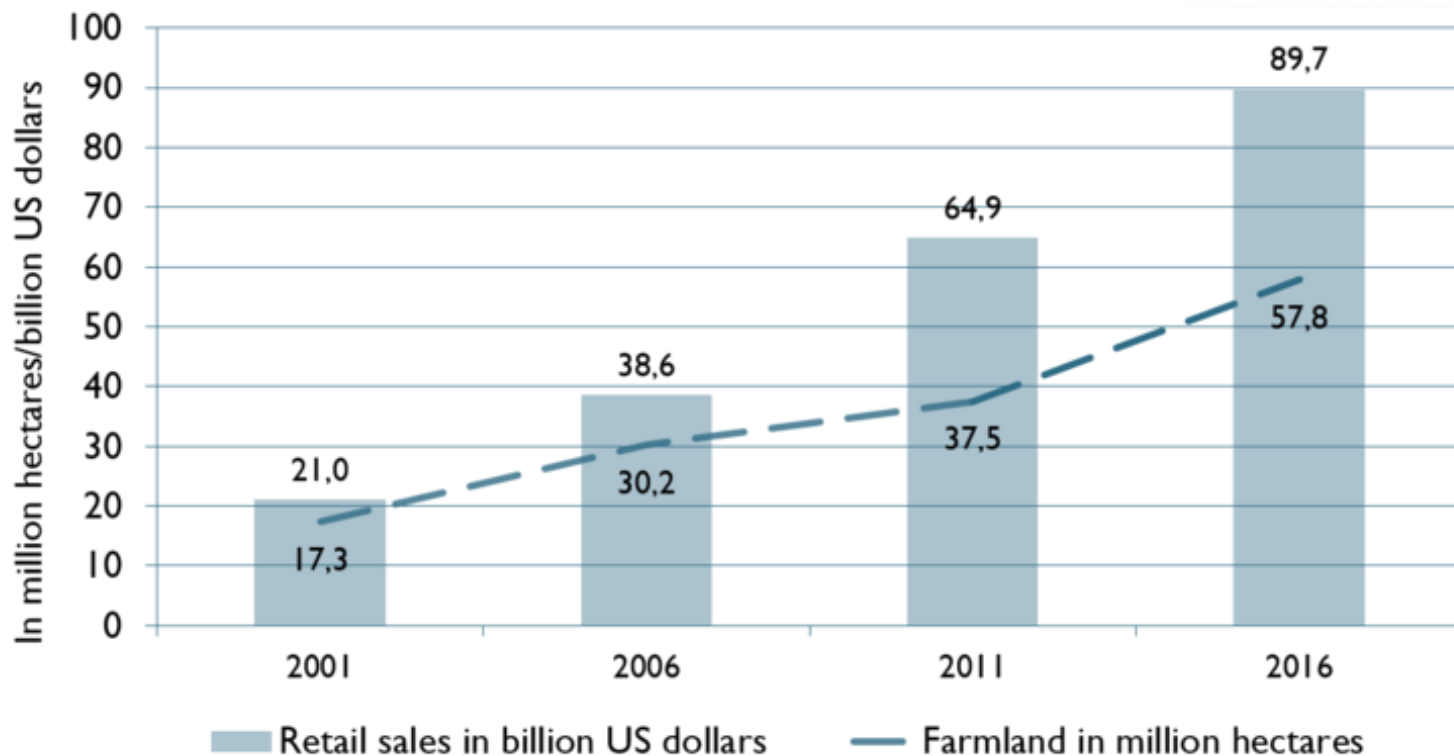
The highest shares the organic market of the total market is in Denmark, followed by Luxembourg, Switzerland, Sweden, and Austria.



The five countries with the highest organic shares of the total market 2016

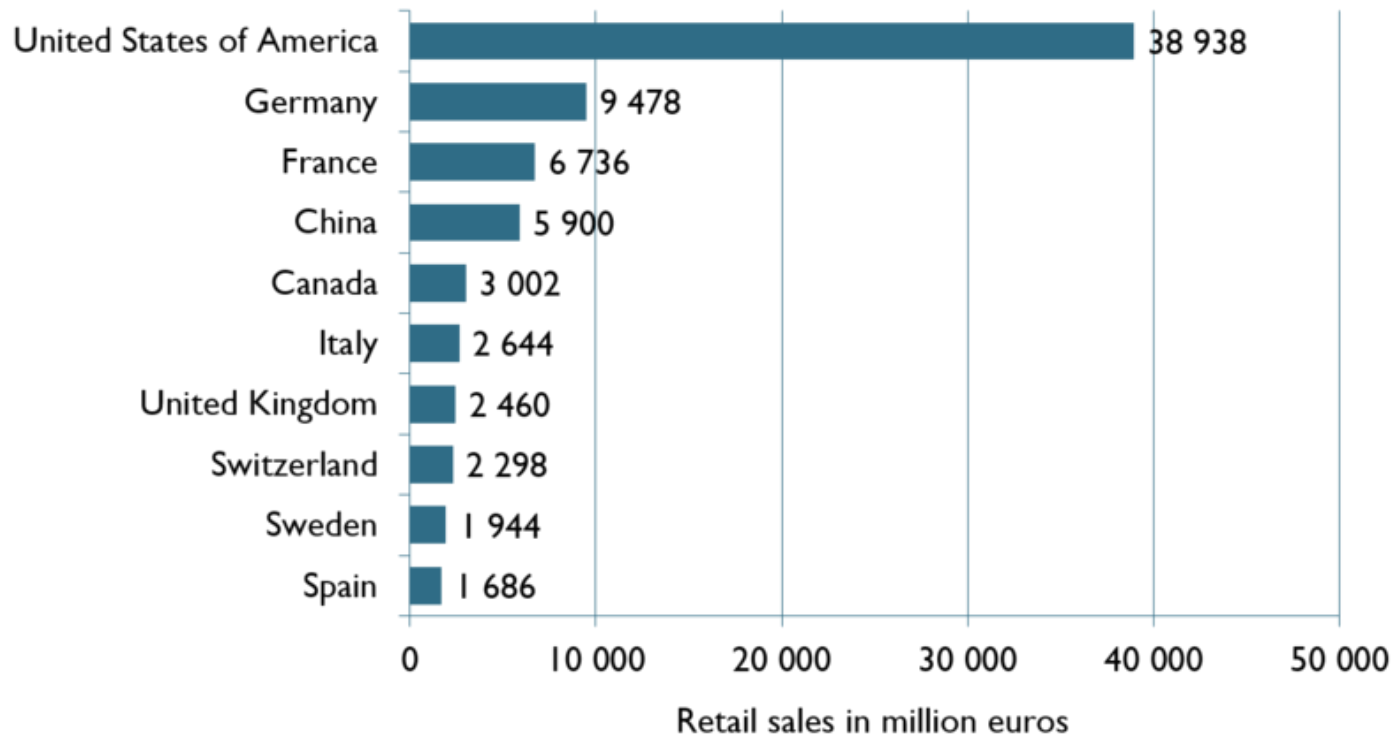
Growth in organic food & drinks sales and farmland, 2001-2016

Source: Ecovia Intelligence 2018



The ten countries with the largest markets for organic food 2016

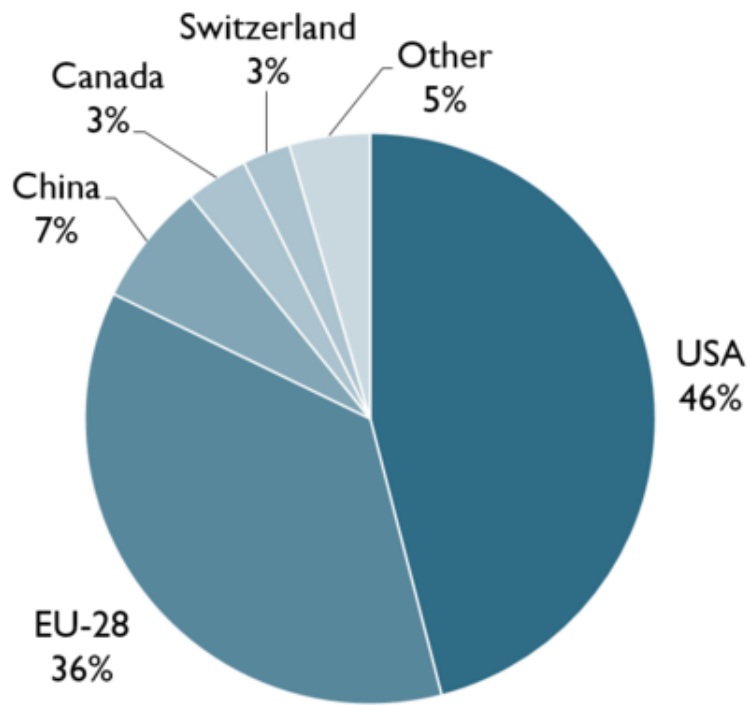
Source: FiBL-AMI survey 2018



Global market: Distribution of retail sales value by single market 2016

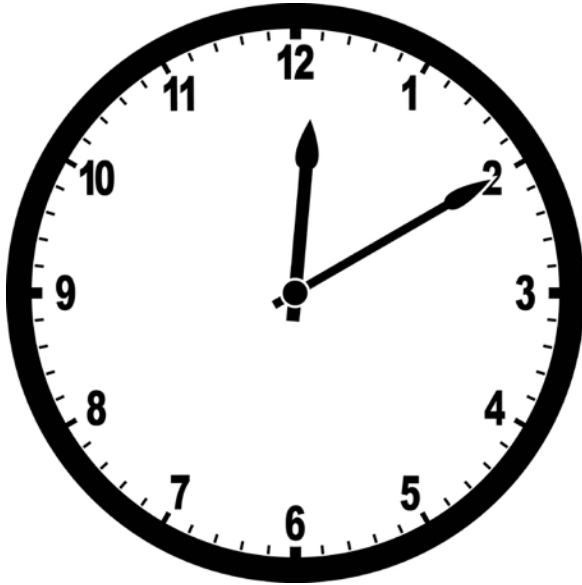
Source: FiBL-AMI survey 2018

FiBL



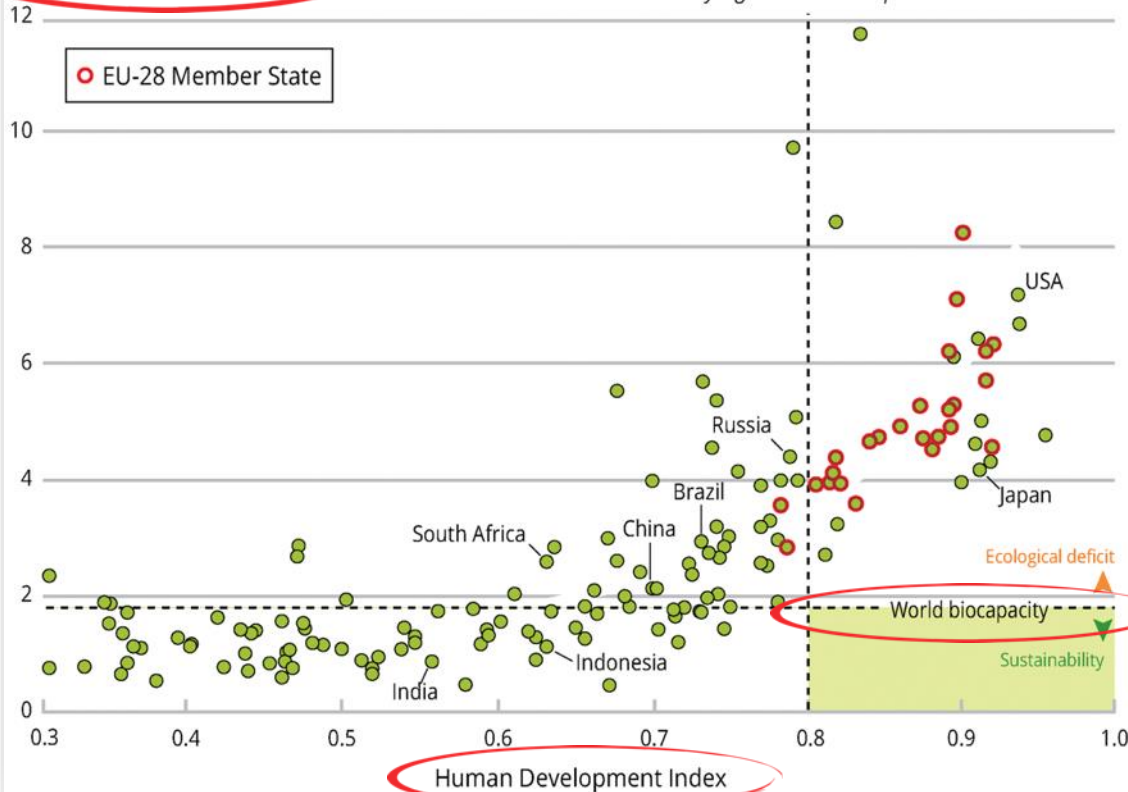
Statement 2:

We moeten veranderen
Er is geen plan B meer

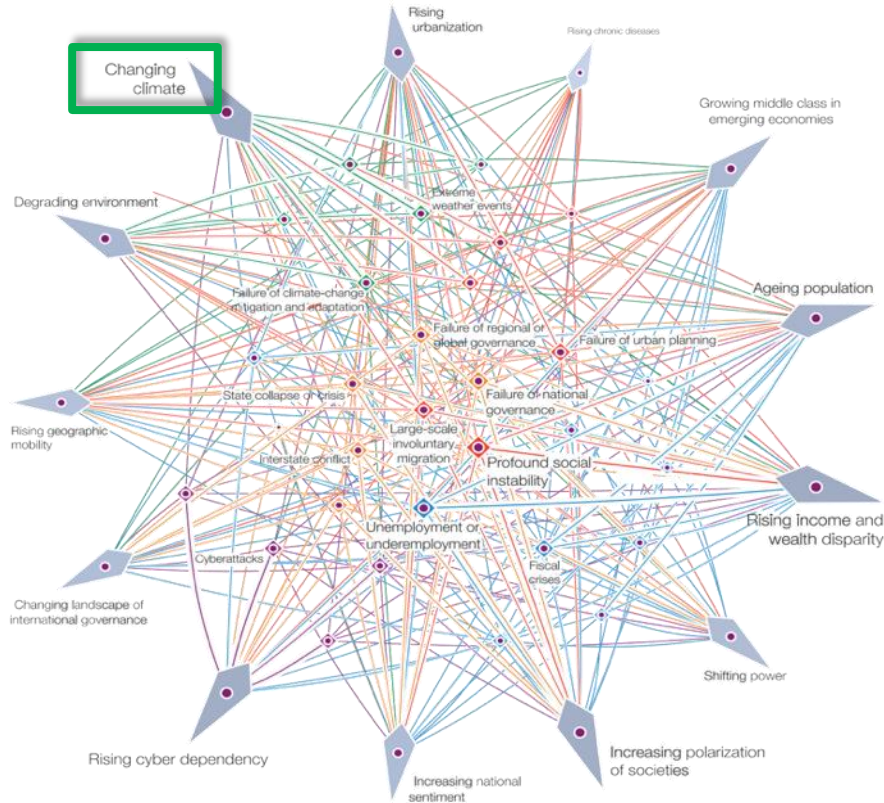


Aarde in overshoot: we hebben 2,4 planeten nodig

Ecological footprint
(hectares per person per year)



Risico's worden groter en groener



- ◆ Economic Risks
- ◆ Environmental Risks
- ◆ Societal Risks
- ◆ Geopolitical Risks
- ◆ Technological Risks

WORLD
ECONOMIC
FORUM

COMMITTED TO
IMPROVING THE STATE
OF THE WORLD

The Risks-Trends Interconnections Map

Source: World Economic Forum Global Risks Perception Survey 2016
Note: Survey respondents were asked to select the three trends that are the most important in shaping global development in the next 10 years. For each of the three trends identified, respondents were asked to select the risks that are most strongly driven by those trends. The global risks with the most connections to trends are spelled out in the figure. See Appendix B for more details. To ensure legibility, the names of the global risks are abbreviated; see Appendix A for the full name and description.

2018: Globale Risico's: 3 van de 5 zijn milieu gerelateerd



Likelihood

Extreme weather events

Natural disasters

Cyberattacks

Data fraud or theft

Failure of climate-change mitigation and adaptation

Impact

Weapons of mass destruction

Extreme weather events

Natural disasters

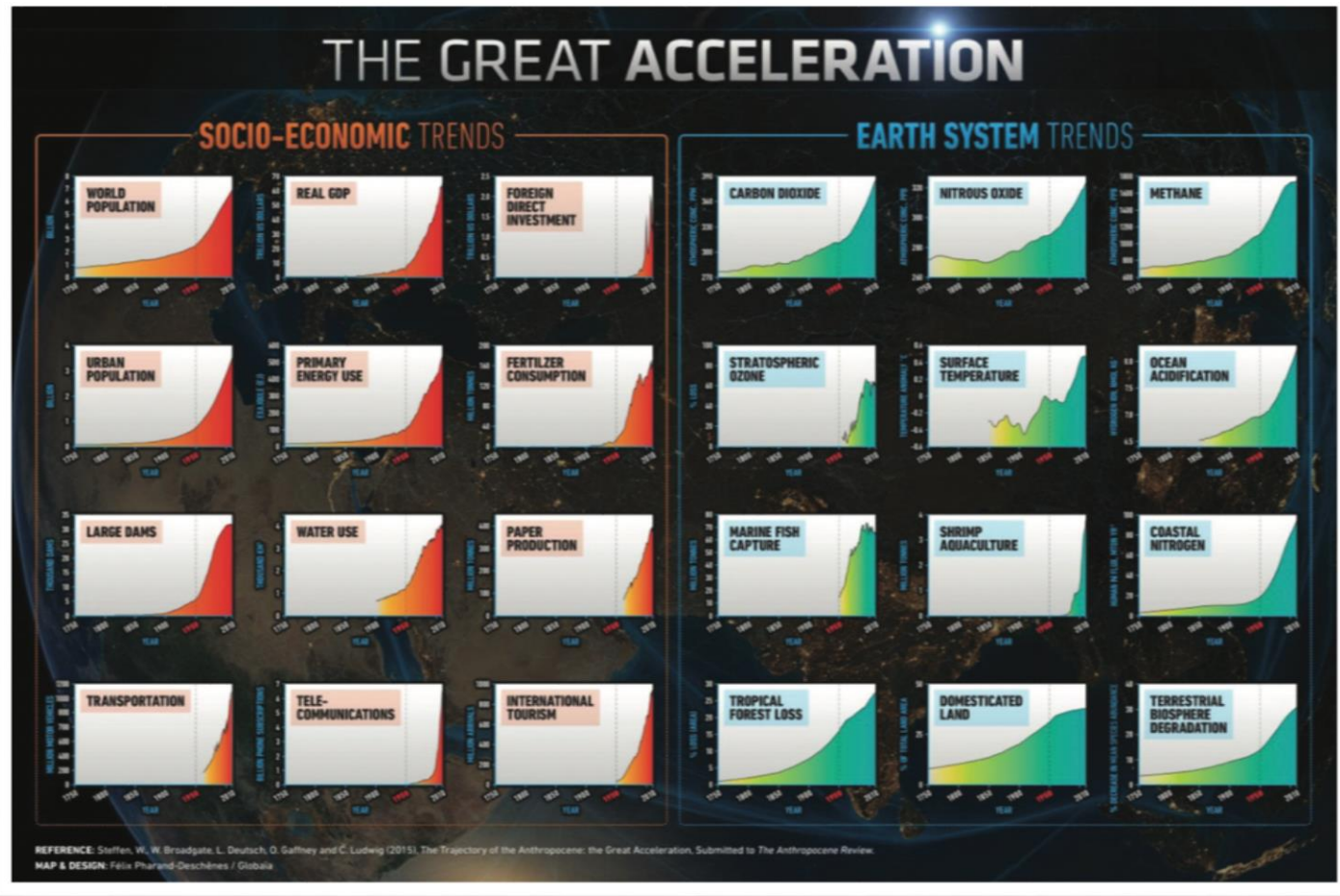
Failure of climate-change mitigation and adaptation

Water crises

-  Environmental Risks
-  Technological Risks
-  Economic Risks
-  Societal Risks
-  Geopolitical Risks



De grote versnellingen



De 3 uitdagingen van ons voedselsysteem

WHAT'S WRONG WITH OUR FOOD SYSTEM?

Every night **1 in 7 people go to bed hungry**—that's almost 1 billion people worldwide. People are hungry not because there isn't enough food produced but because our food system is broken. In fact, **80% of the world's hungry are directly involved in food production**. We can address this hunger if we support small-scale food producers, tackle climate change and reduce food waste.

CLIMATE CHANGE & FOOD PRICES

The average price of staple foods could more than double by 2030—with more than half of that increase due to changes in average temperatures and rainfall patterns.

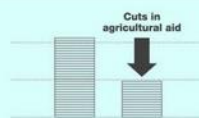


WASTE

In both industrialized and developing countries, unacceptable quantities of food are wasted but for entirely different reasons.

HUNGER

There have been cuts of more than 50% in government aid to small-scale producers, even though the majority of the world's hungry are involved in food production.



HIGH TEMPERATURES

In July 2010, temperatures exceeded 40°C (104°F) in Russia, destroying millions of acres of wheat. Wheat production plunged 30% and the price internationally increased by 85%.



DROUGHT

In 2010, a drought in Ukraine caused wheat production to plummet 20% compared to the year before.



MONSOON

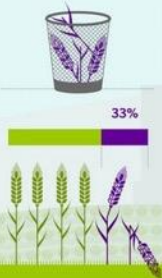
Heavy rainfall and multiple typhoons hit Southeast Asia in 2011, severely affecting 6% of the region's total rice area and driving prices up by 30% in some areas.



HARVEST WASTE

Currently, developing countries waste nearly one third of food supply. With better access to adequate storage, refrigeration and transportation this could be reduced.

DEVELOPING WORLD



CONSUMER WASTE

In industrialized countries we, as consumers and retailers, throw away about one third of all food that is produced.

INDUSTRIALIZED WORLD



100–150 MILLION COULD HAVE ENOUGH TO EAT

CHANGE CAN HAPPEN

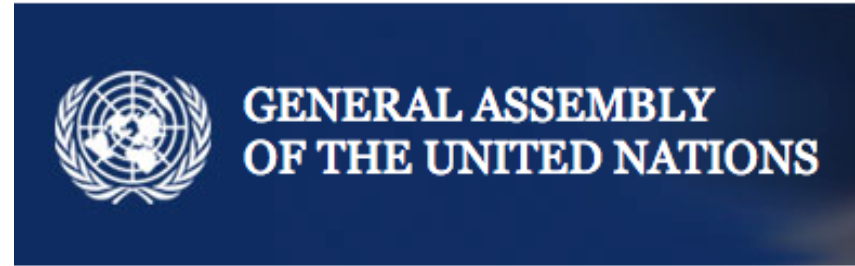
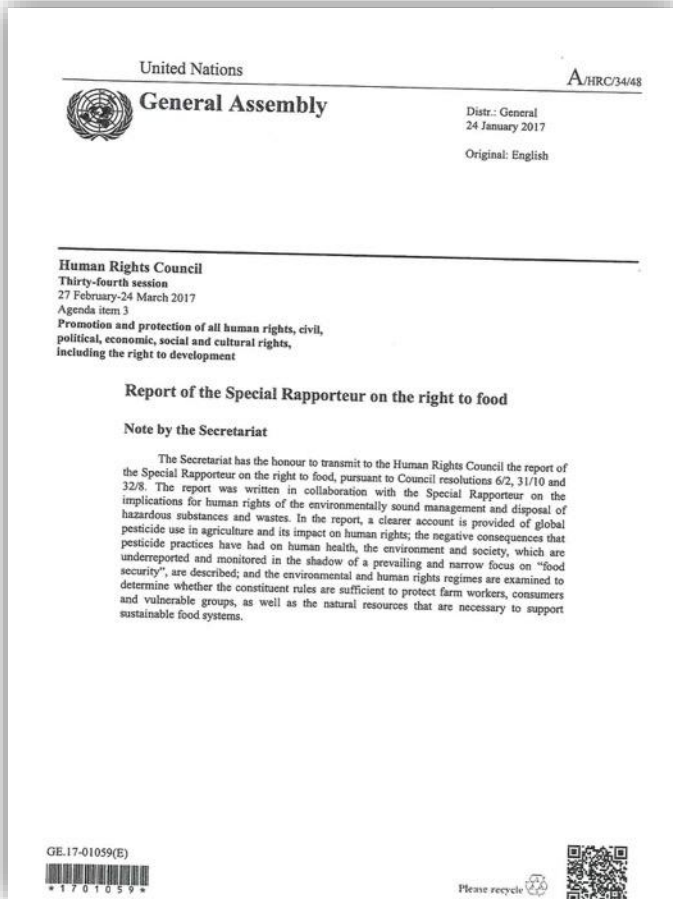
By investing in small-scale farmers, Brazil reduced the number of people living in poverty by 20 million between 2003-9. We can tackle extreme hunger by helping small-scale producers grow more food more sustainably.



Statement 3:
Gangbare landbouw
is over-en-uit




UN : “Gangbare landbouwsysteem heeft geen toekomst”





.....“ the assertion promoted by the agrochemical industry that pesticides are necessary to achieve food security is not only **inaccurate**, but **dangerously misleading...**”



.....” In principal there is adequate food to feed the world; **inequitable** production and distribution systems prevent major blockades that prevent those in need from accessing it”

Statement 4:

We hebben een crisis van het Systeem

epo

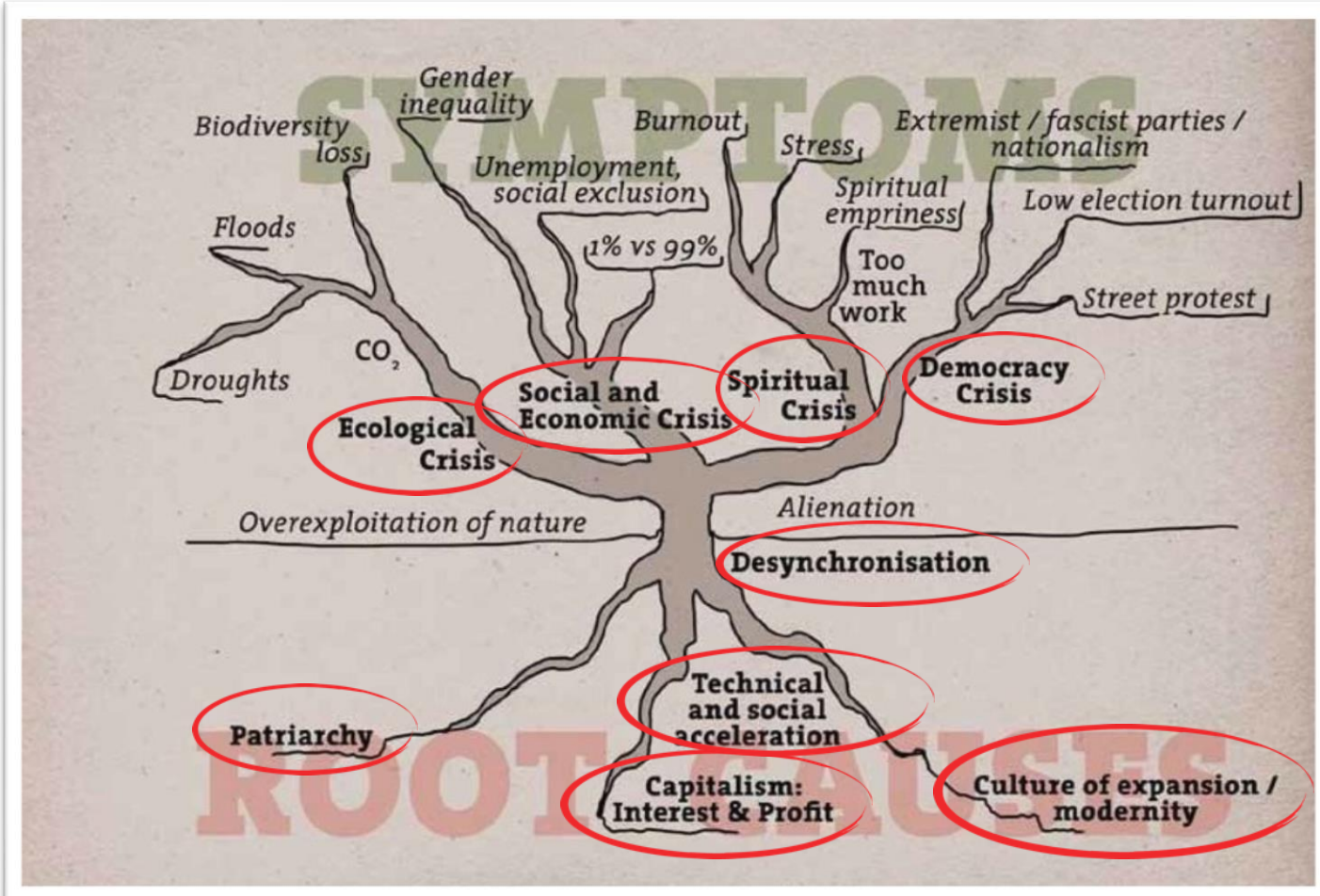
Als de laatste boom
geveld is,
eten we ons
geld wel op

Ludo
De
Witte

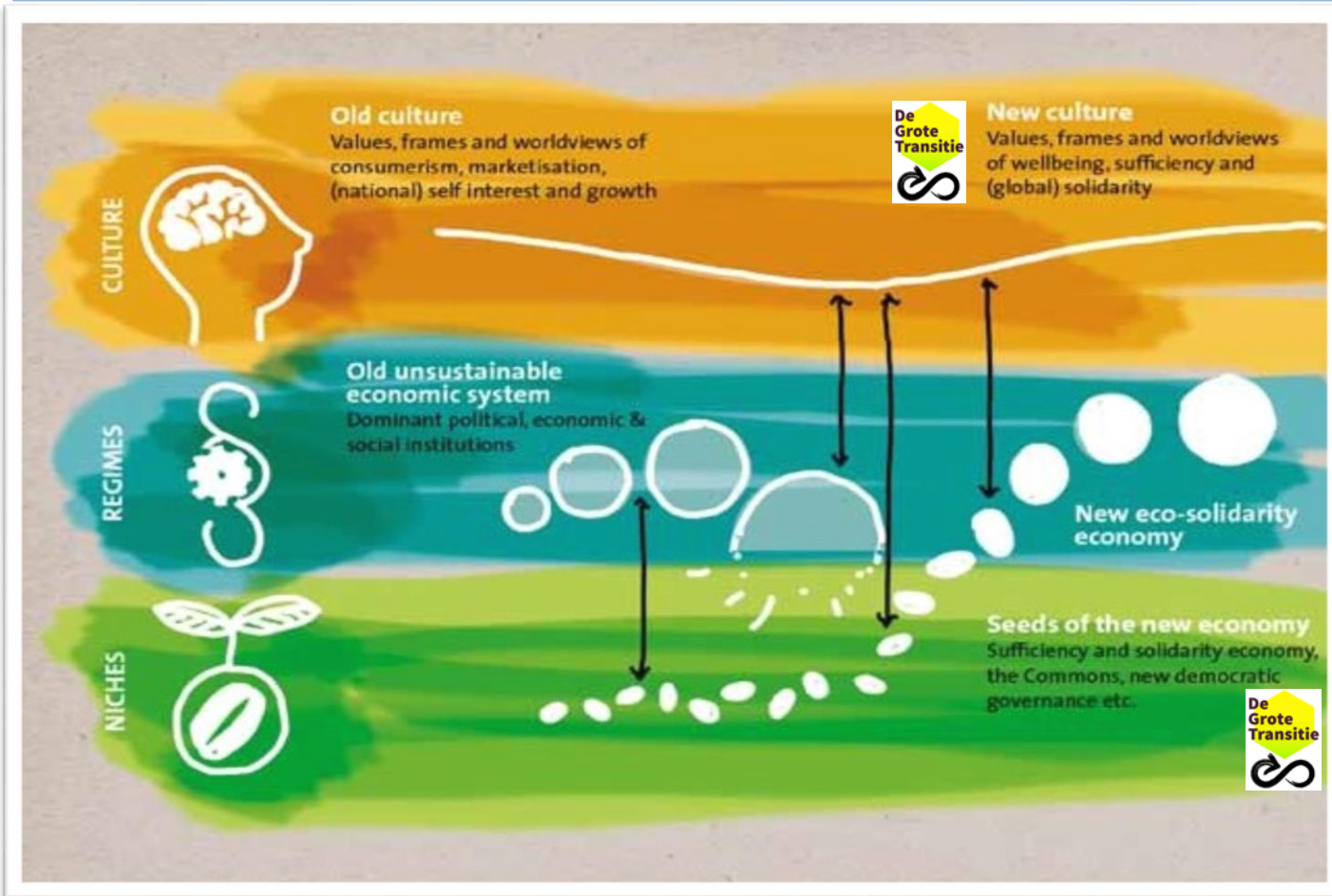
Het kapitalisme
versus de aarde



Huidige crisis is een **SysteemCrisis**

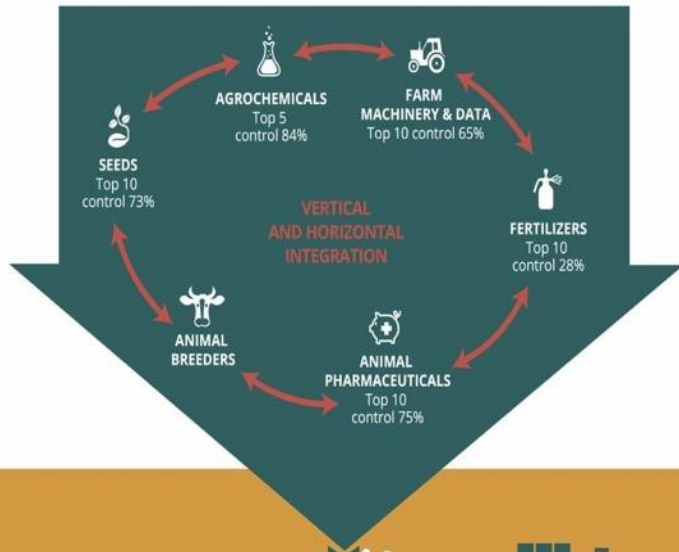


Transitie nodig naar een nieuw systeem



Statement 5:
Landbouw en Voedsel
worden meer en meer
gedomineerd door een paar
spelers





30%
LARGE SCALE
FARMS



70%
SMALLHOLDERS

1.5bn

PRODUCERS (570m. farms)



**AGRICULTURAL
COMMODITY TRADERS**
Top 10 control 90%



**FOOD AND
BEVERAGE
PROCESSORS**
Top 10 control 90%

ANIMAL SLAUGHTER
4 firms control between
53 & 75% depending
on animal type



RETAILERS

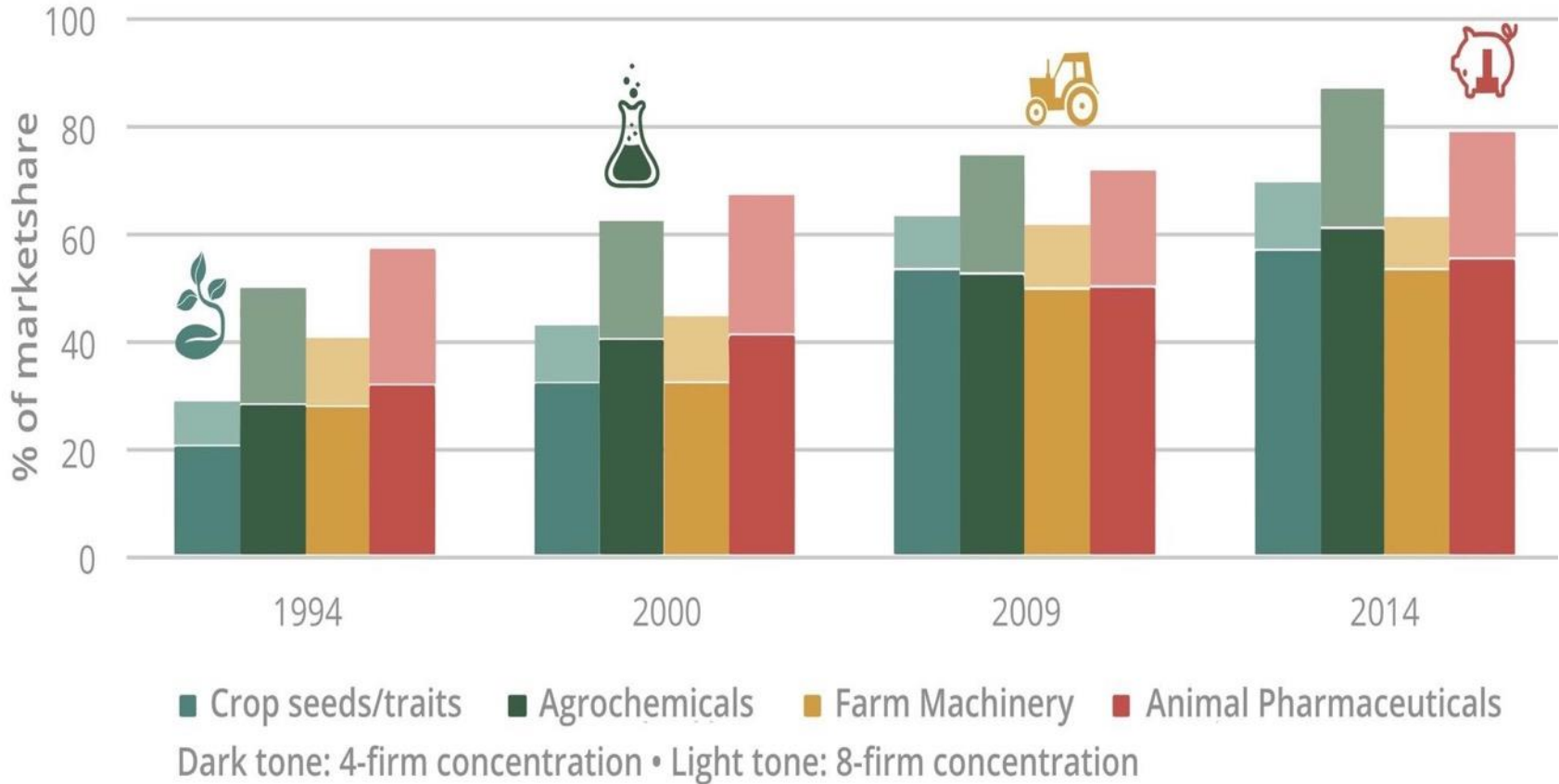
ALTERNATIVE FOOD SYSTEM INITIATIVES

7.5bn

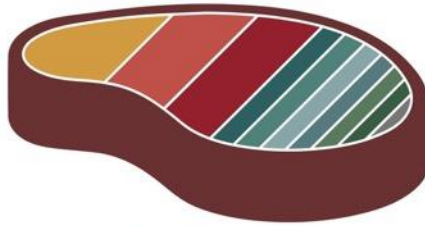
EATERS

4- AND 8- FIRM CONCENTRATION IN AGRICULTURAL INPUT INDUSTRIES

(Data source: ETC, 2015)



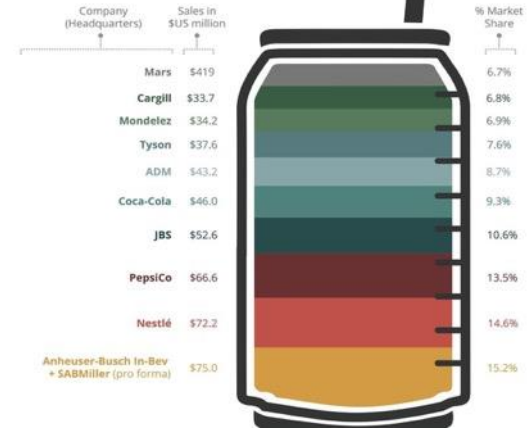
Meat



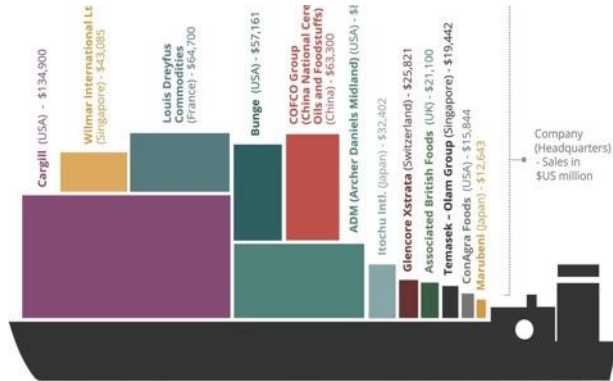
Retail



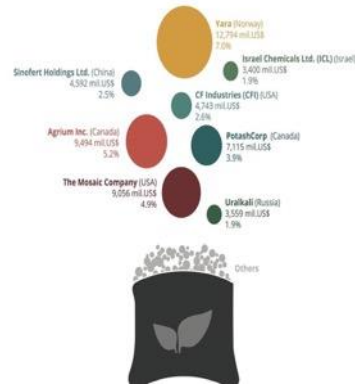
Food co.



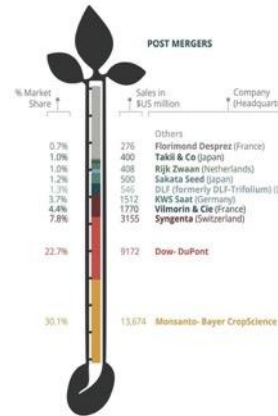
Commodity Traders



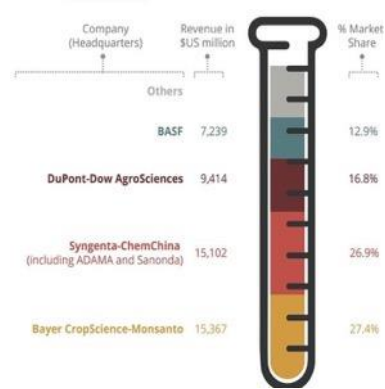
Fertiliser



Seeds



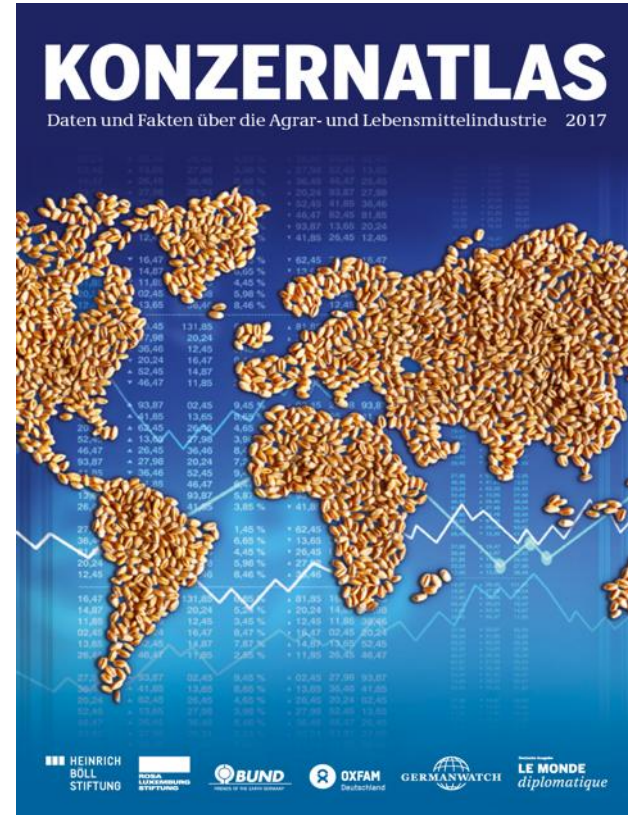
Pesticides





EURO 14.500.000.000,=





Wat is nou eigenlijk het probleem ?

”Macht werkt via *uitputting*”

Sara Ahmed

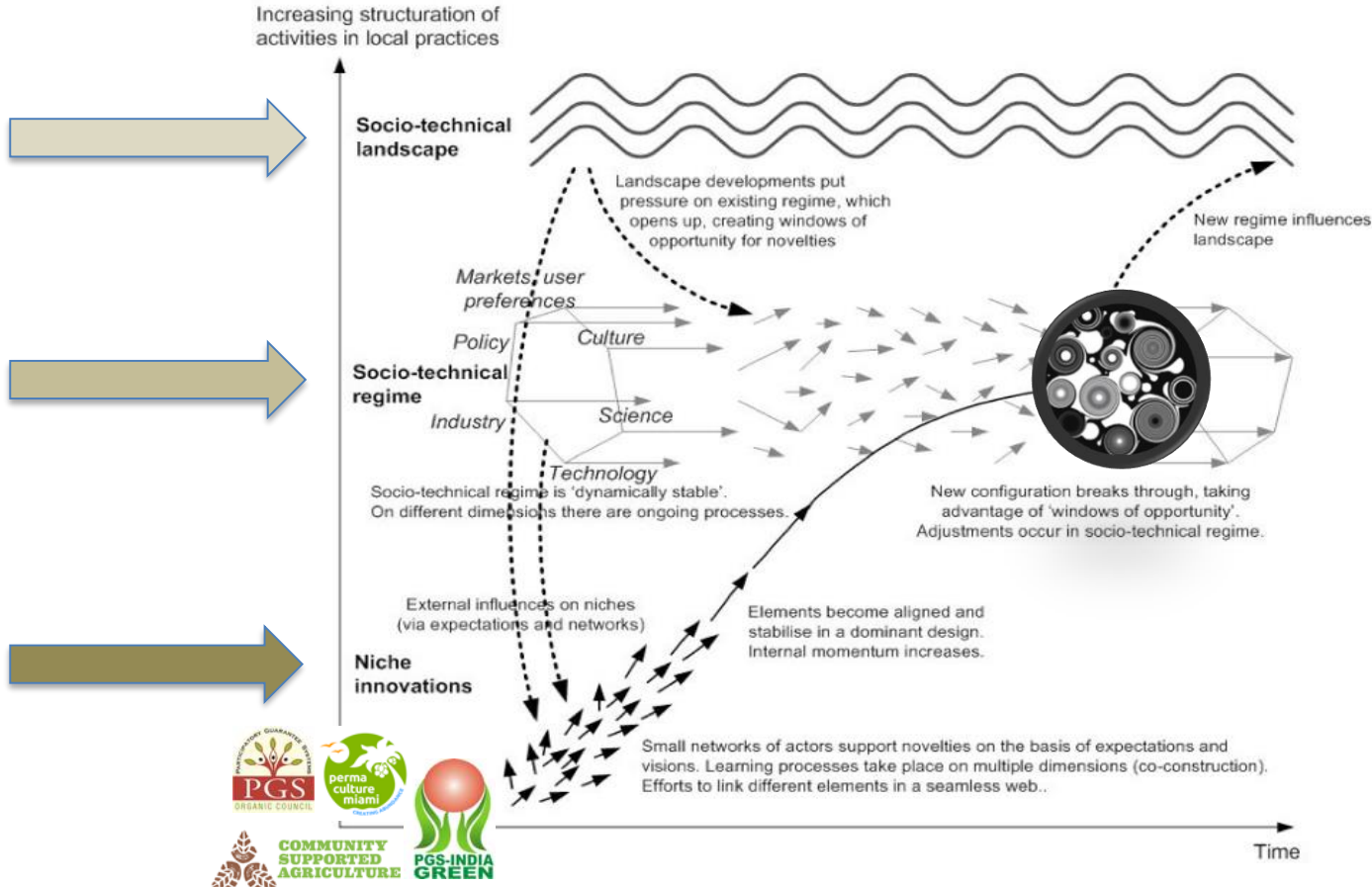


Statement 6:

Sociale bewegingen raken
ingesloten door het systeem
dat ze uit hebben gedaagd

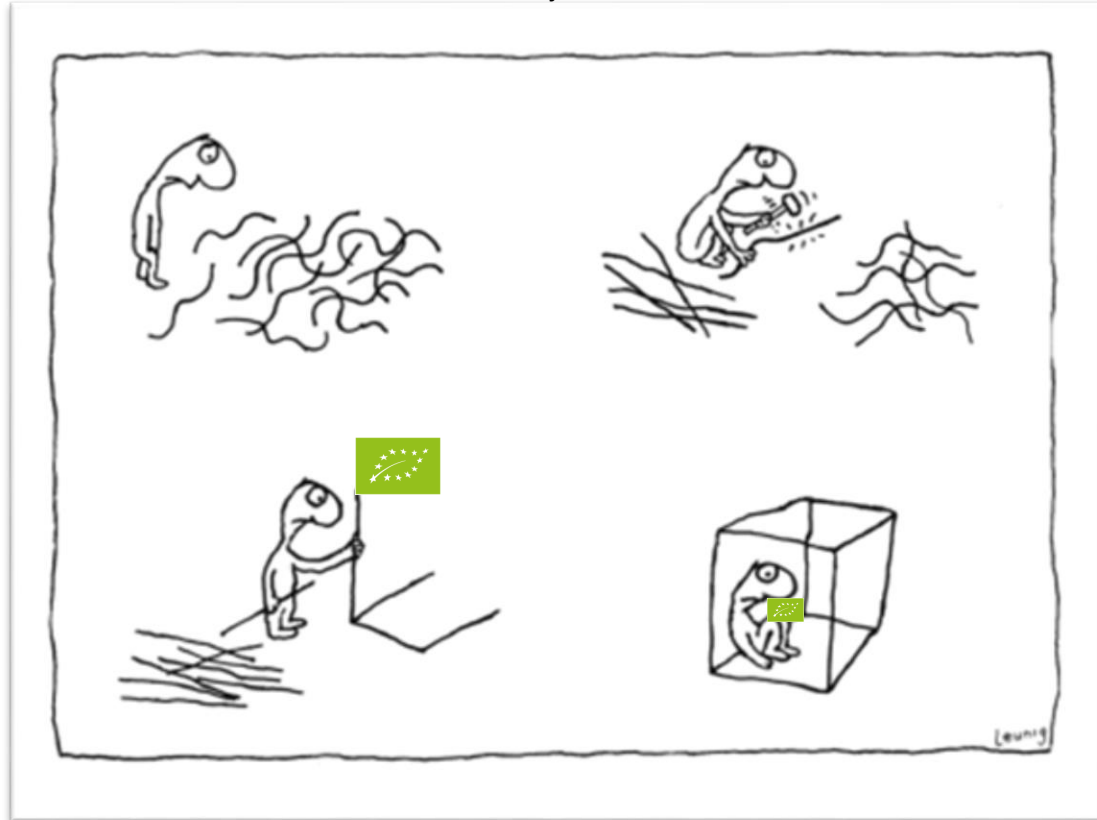


De theorie van sociale bewegingen



De ingesloten pionier

... Voormalig pioniers die regime worden *zonder zich hiervan bewust zijn* worden welbewust *ingesloten* door datzelfde regime dat ze aanvankelijk wilden veranderen.....

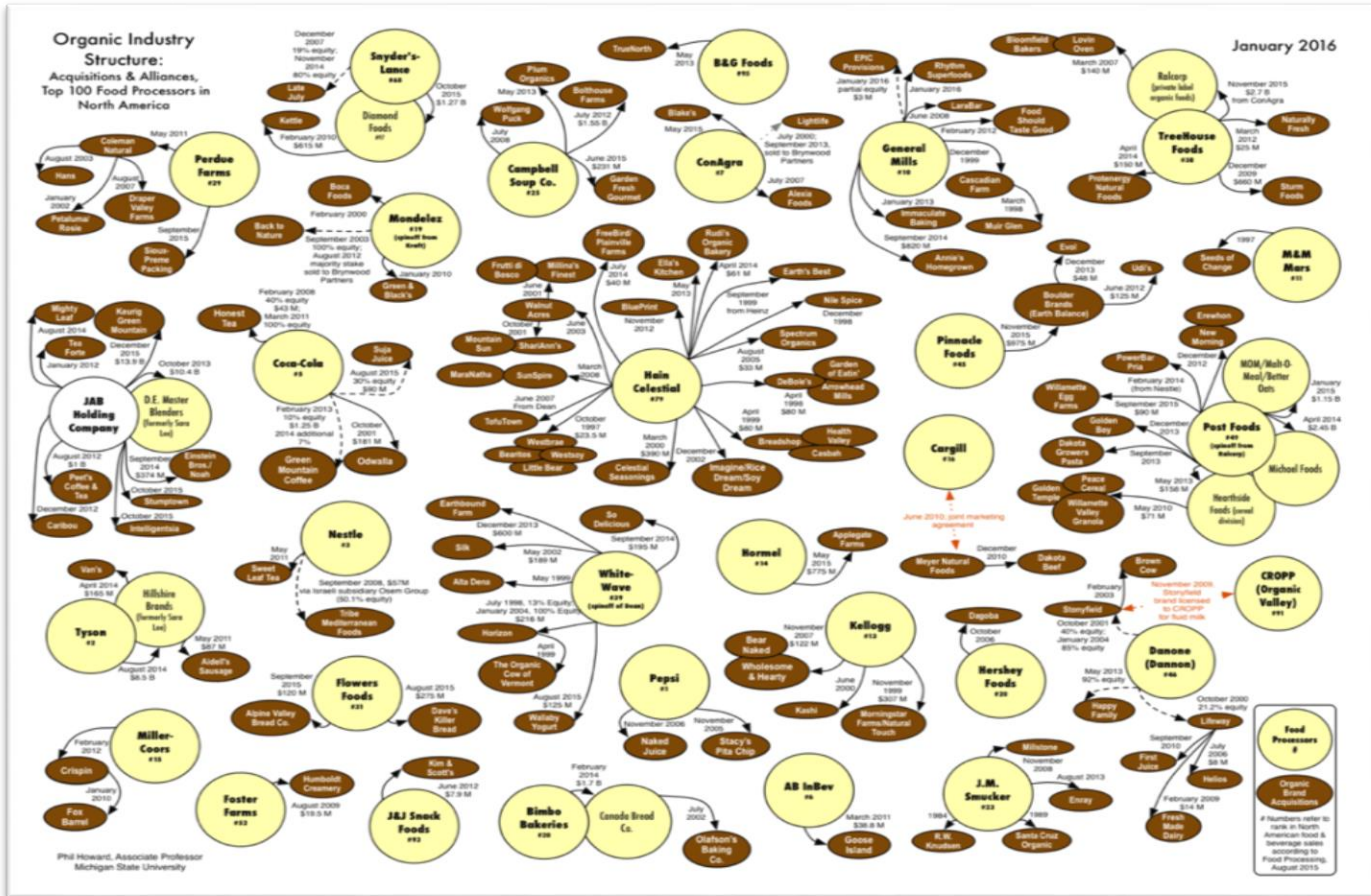


Statement 7:

“The Silent Take over”:

Consolidatie heeft een groot
effect op de biologische markt

Van wie is biologisch?



De vier **IFOAM** beginselen van biologisch



**The Principle
of Health.**



**The Principle
of Ecology.**



**The Principle
of Fairness.**



**The Principle
of Care.**

Beginsel van GEZONDHEID

Biologische Landbouw moet de gezondheid van bodem, plant, dier, mens en de planeet als een ondeelbaar geheel in stand houden en versterken.

Beginsel van ECOLOGIE

Biologische Landbouw moet gebaseerd zijn op levende ecologische systemen en kringlopen, met hen meewerken, ze versterken en instand houden.

Beginsel van BILLIJKHEID

Biologische Landbouw moet gebaseerd zijn op relaties die billijkheid waarborgen m.b.t. de gemeenschappelijke omgeving en ontwikkelingsmogelijkheden.

Beginsel van ZORG

Biologische Landbouw moet met voorzorg en verantwoordelijkheid worden beoefend, om de gezondheid en het welzijn van de huidige en toekomstige generaties en hun leefomgeving te beschermen.

Reductie van onze principes



The Principle
of **Health**.



The Principle
of **Ecology**.



The Principle
of **Fairness**.



The Principle
of **Care**.





The Principle
of Health.



The Principle
of Ecology.



The Principle
of Fairness.



The Principle
of Care.

Een beweging van
Principes en Waarden



Wordt verkocht door
een markt voor
Waarde Creatie



The Principle of Health.



The Principle of Ecology.



The Principle of Fairness.



The Principle of Care.



Proces gebaseerde

Beweging

4 holistische principes

'invloed creeren'



Eind product

Microscoop

1 gereduceerd principe

'doen van documenten'

Vraagje aan de zaal:

Is biologische groei zonder waarden
'waarden-loze' omzet?

Statement 8:

Biologisch wordt uitgegumd door
bestaande duurzaamheids
concepten

- ✓ **Frame**
- ✓ **Maak alternatieve woorden en discoursen**
- ✓ **Herschrijf het narratief**
- ✓ **Gum het “B-woord” uit**

1. Frame

“Bio kan de wereld niet voeden”

“Bio is over-all gezien minder duurzaam”

“Bio is voor the happy few”

“Bio is voor multinationals hatende - anti-neoliberale marxistische loosers, die geen echte baan kunnen krijgen”

2. Introduceer nieuwe termen

Natuur-Inclusieve Landbouw

Balans Landbouw

Grond gebonden Landbouw

Bos Landbouw

Klimaat-slimme Landbouw

Low carbon resilient- Farming

Circulaire Landbouw

Agro-ecologische Landbouw

Kringloop Landbouw

Duurzame Landbouw

Natural Resource Saving Agriculture

Low input Farming

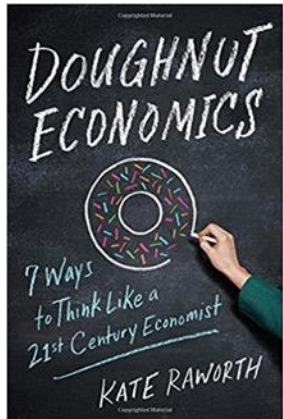
“On the way to Planet Proof”- Farming

3. Herschrijf het narratief

Stop gewoon met het gebruiken van de term

Communiceer en promoot sterk de nieuwe termen

Creer met overtuiging een "organic-is-sooo-last season" gevoel



4. Gum uit



Statement 9:

Biologisch moet aan het werk.

We zijn nodig maar moeten onze leidende rol als vernieuwer opnieuw invullen. En niet meer alleen.

Biologisch *als teelt techniek*

- Stripped from social aspirations
- Retooling the global agriculture
- Achieving environmental and ecological targets

Biologisch *als eindproduct*

- Retail
- Endproducts
- Brands
- Marketing
- Promotions

Biologisch *voor de betere wereld*

- Social goals
- Mass small-scale production
- Cooperative structures
- Serving a wide range of public goods





Statement 10:

Hou het simpel...

Bij duurzaamheid

Bij voedsel

Bij verandering

-- Footprint



Reduce
negative impacts...
do less bad

++ Handprint



Enlarge
positive impacts...
do more good

+++ Fingerprint



Personalize
Do that in your own
way...

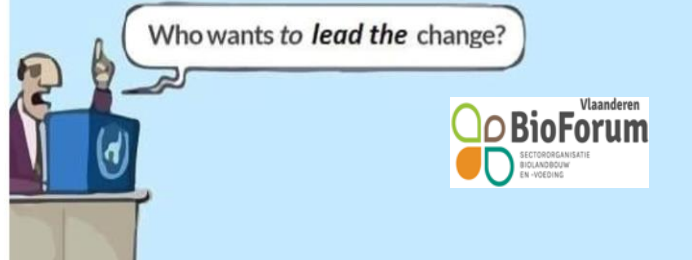
Food

1. Buy it with thought
2. Cook it with care
3. Use less wheat & meat
4. Buy local foods
5. Serve just enough
6. Use what is left

Don't waste it



U.S. Food Administration - 1917



- ✓ Eis je rol weer op als leidende ‘veranderaar’
 - ✓ Werk samen met andere veranderaars
- ✓ Neem de systeem verandering als uitgangspunt
 - ✓ Durf strijd te leveren
 - ✓ Bedenk nieuwe keten concepten
- ✓ Waak voor het groeiende markt comfort
 - ✓ Vorm *echte* ketens, vorm communities
- ✓ Reflecteer, bespiegel, blijf kritisch kijken
 - ✓ Wordt nooit mainstream

BioForum.....

Bedankt voor uw
uitnodiging....

Het was een eer..

Zeker en vast....



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