

Together towards a sustainable and vital Agri-Food sector in 2040



Dairyfarm
120cows
2 milkingrobots
70 hagrassland
15 hameadowbird
protectionarea.



Director Food &
Agriculture
Rabobank
Netherlands

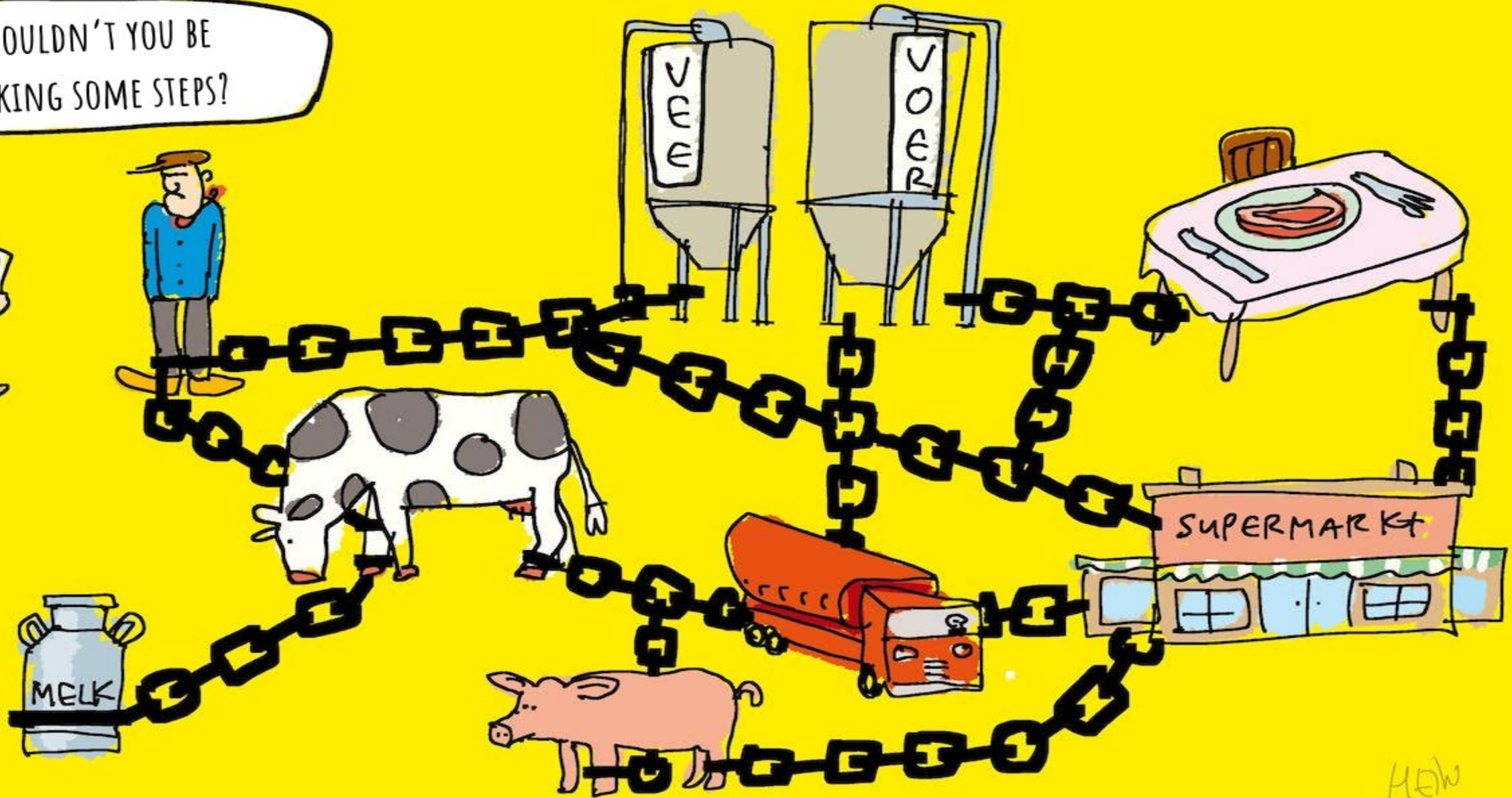


Most pressing sustainability issues

An end to volume growth, livestock numbers to decline

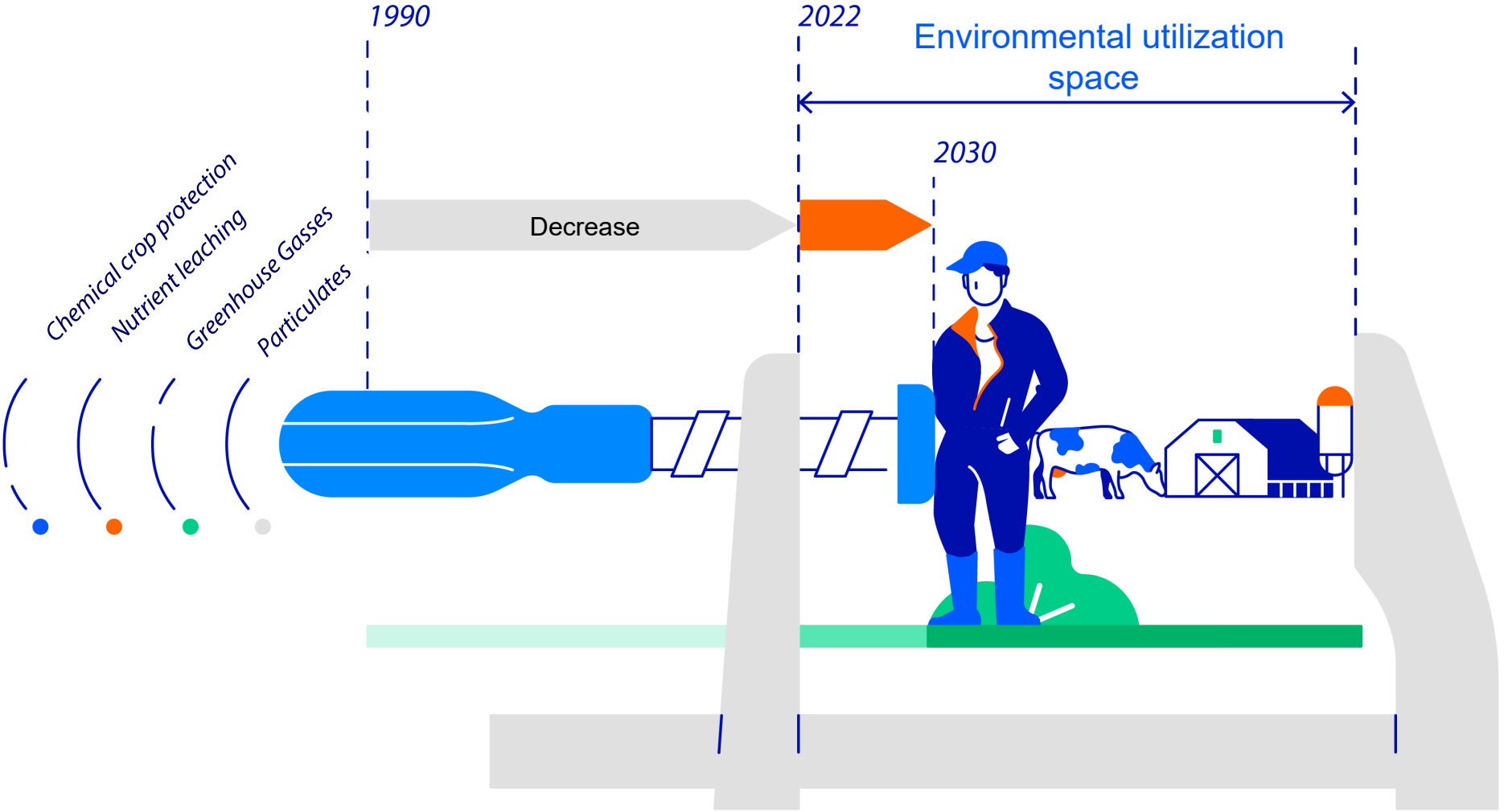
Topic	Today's situation	Future goal
Ammonia emissions	-63% since 1990	Another 50% reduction needed by 2030
Greenhouse gasses	-15% since 1990	Greenhouse horticulture climate neutral in 2040 Livestock farming -5 Mton in 2030 (-25%)
Water	Phosphate fertilizer -85% since 1990 Nitrogen fertilizer -39% since 1990	Reach status of 'good' quality requires: <ul style="list-style-type: none">• Reduction of nitrate use in sandy soils• Reduction of phosphate in surface water
Chemical Crop Protection	15% decline in exceeding limits since 2017	90% reduction in exceeding limits
Fine dust	Stable; poultry causes more than half of emissions	50% reduction in 2030 compared to 2016
Antibiotics	-64% between 2009-2018	Target is 70% reduction

SHOULDN'T YOU BE
TAKING SOME STEPS?



How
to
Kohr

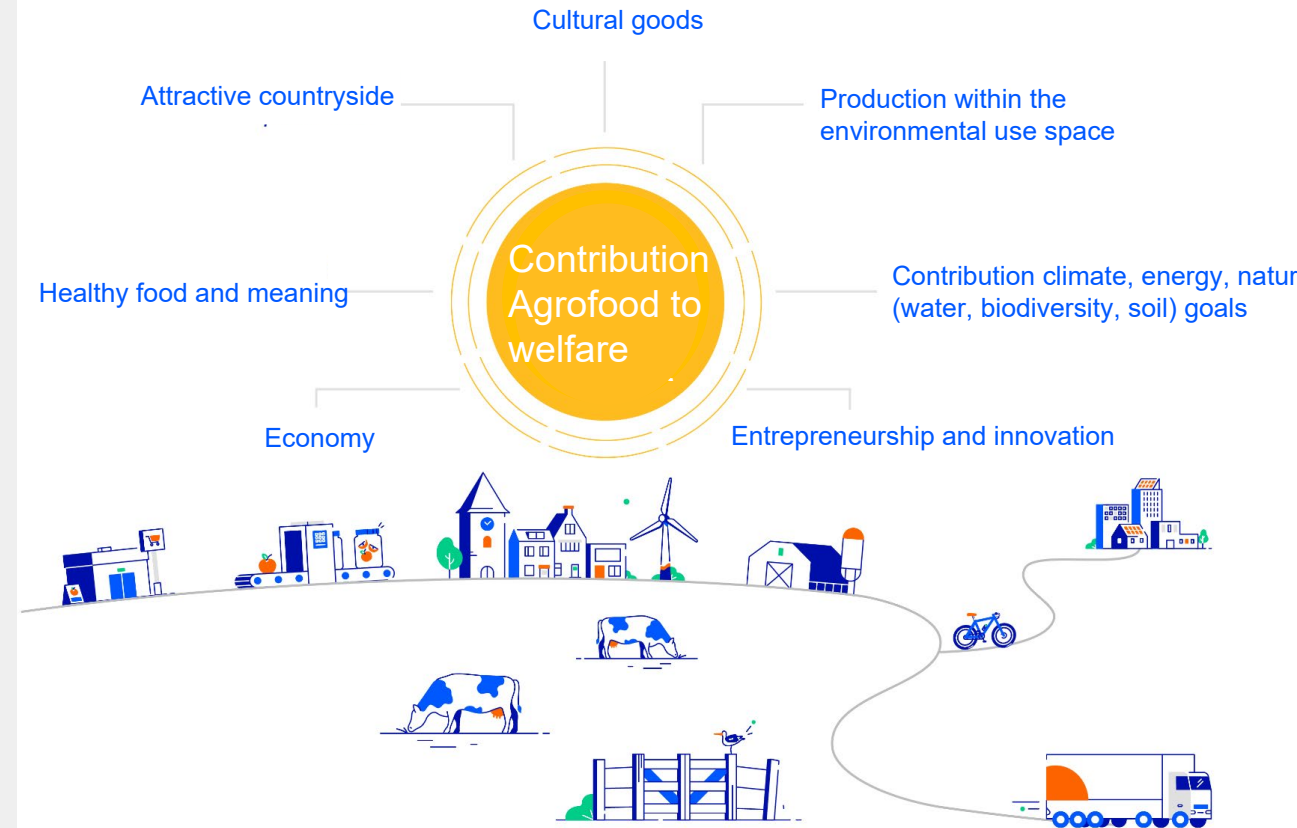
Space for agriculture and horticulture in the Netherlands



Existence of Agrofood in the Netherlands

Welfare as a starting point

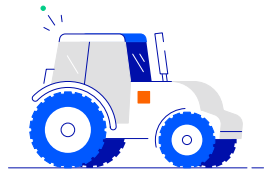
What does a certain activity contribute to quality of life? And what is the impact on later generations?



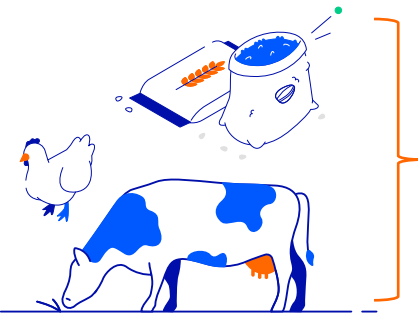
From Farm to Fork

Rabobank serves customer throughout the agri-food chain

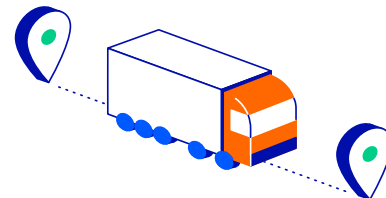
Farminputs



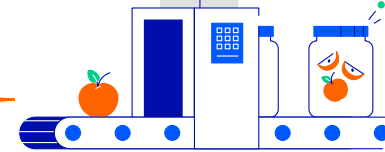
Primary sector



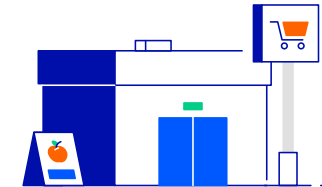
Trade & export



Processing



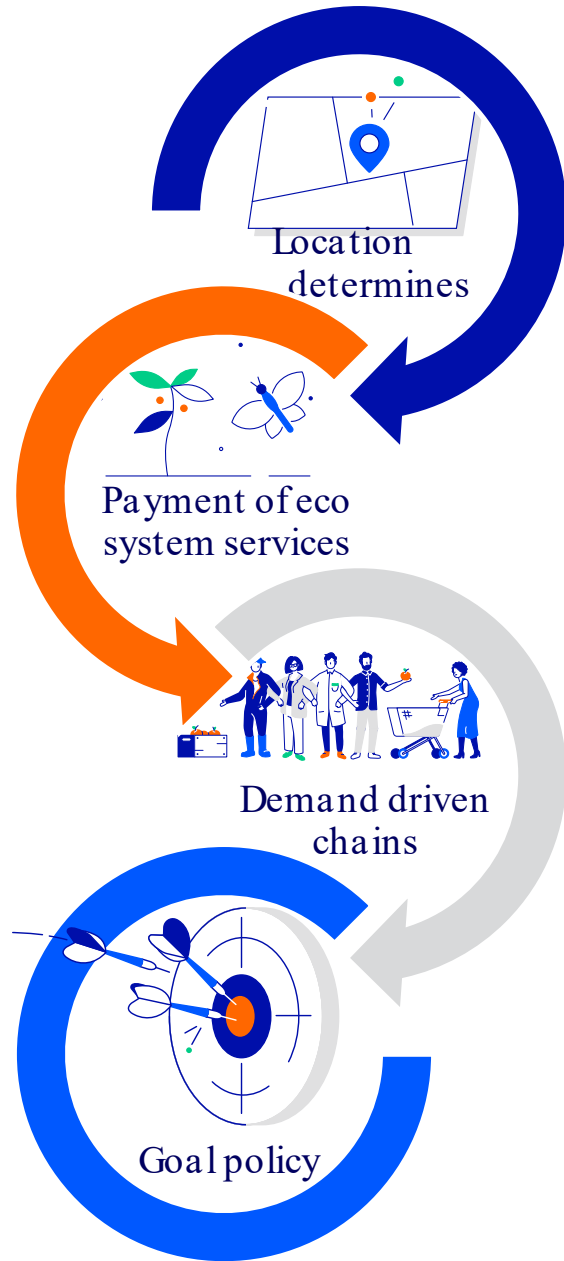
Retail



Consumer



True Value



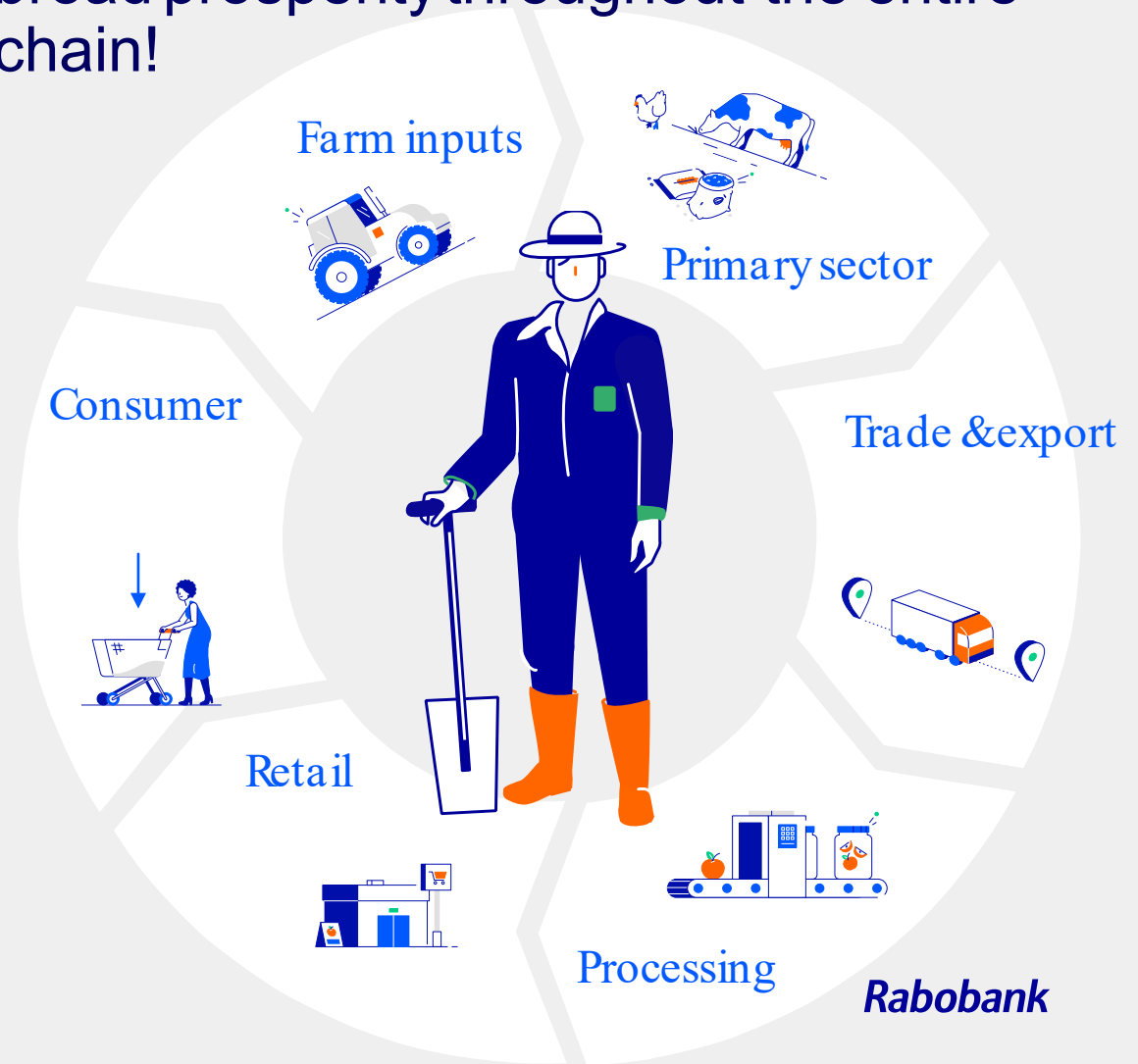
Current chain

Of profit maximization in every link of the chain ...



True value chain

...towards profit optimization based on broad prosperity throughout the entire chain!



Translationvision to farm

Agricultural entrepreneurs will have to make a strategic choice, we recognise 5 strategic paths

Move

- Moving the business to another location to continue and develop the business



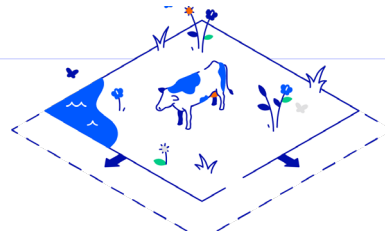
Extensify

- Reduce stock density per ha (through land purchase or livestock reduction)
- Extending the plan



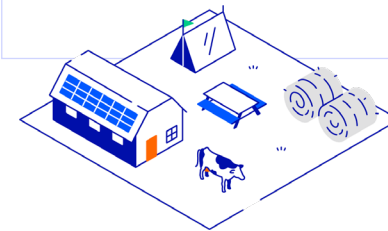
Switch

- Forexample, to organic farming
- Or multifunctional agriculture (recreation, housing, care, hospitality, energy generation, etc.)



Innovate

- Using technology to reduce emissions
- Using improved farm management to reduce emissions (e.g. further development of animal feed)



Stop

- Business termination
- Possibly continuing the business abroad (from quitting to relocating)



9-Box grid

Location, economic, ecologic

RESILIENCE MATRIX	Financial + BIRTO & CDSCR	Financial +/- BIRTO & CDSCR	Financial- BIRTO & CDSCR
Futureproof+ ATD score	Facilitate broadly		
Futureproof+ /- ATD score			
Futureproof- ATD score			No facilitation

Thank you for
your attention



de coöperatieve Rabobank