

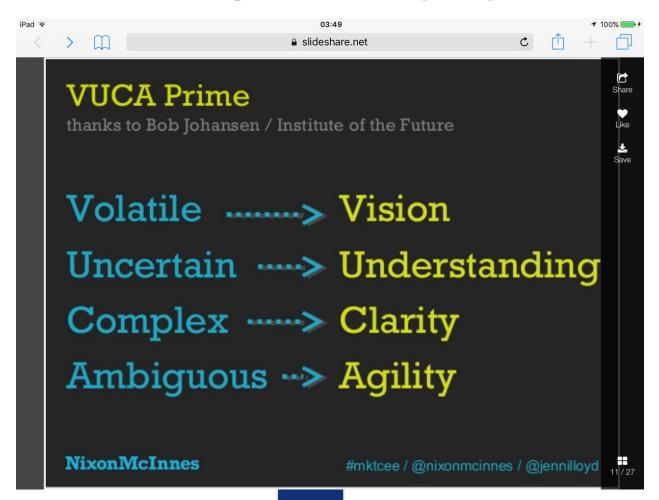
Bioeconomy, Food and Nutrition Security

Thomas Arnold Advisor Sustainable Bioeconomy - DG RTD

XXX EURAGRI conference, Tartu 26 September 2016 "The bio-economy – challenges and implementation – the research organizations' perspective"



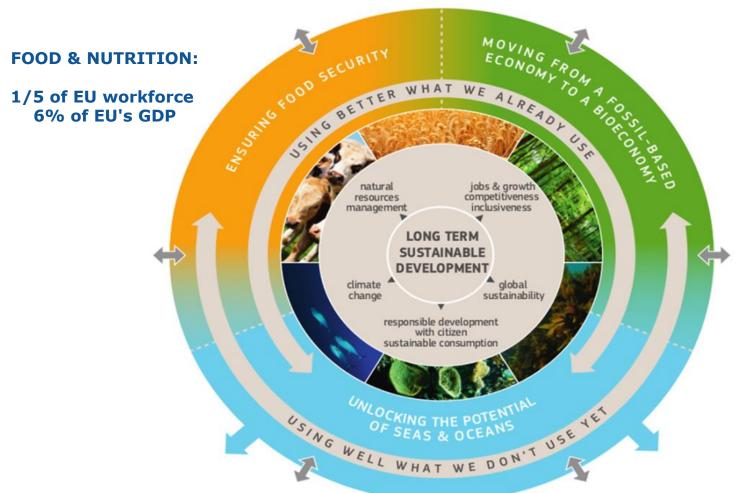
"The bio-economy – challenges and implementation – the research organizations' perspective"







The Bio-Economy



2. EU context



- 1. A new boost for jobs, growth and investment
- 2. A connected digital single market
- 3. A resilient Energy Union with a forward looking climate change policy
- 4. A deeper and fairer internal market with a strengthened industrial base
- 5. A deeper and fairer EMU
- 6. A reasonable and balance free-trade agreement with the U.S.
- An area of justice and fundamental rights based on mutual trust
- 8. Towards a new policy of migration
- 9. A stronger global actor
- 10. A Union of democratic change





SDGs – All directly or indirectly relevant to bioeconomy or FNS

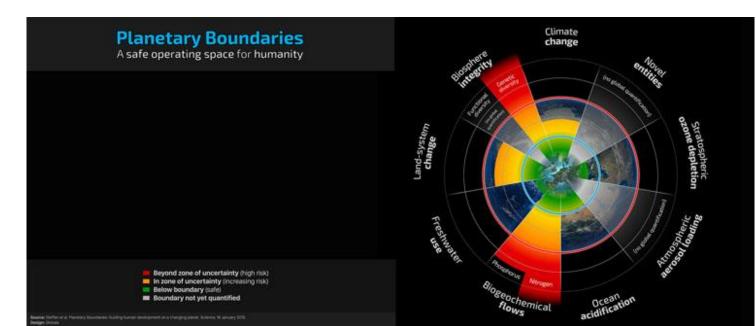




Planetary Boundaries 2.0 - All crossed boundaries relate to bioeconomy and FNS

"As Science publishes the updated research, four of nine planetary boundaries have been crossed

Four of nine planetary boundaries have now been crossed as a result of human activity, says an international team of 18 researchers in the journal Science (16 January 2015). The four are: climate change, loss of biosphere integrity, land-system change, altered biogeochemical cycles (phosphorus and nitrogen)." Stockholm Resilience Centre

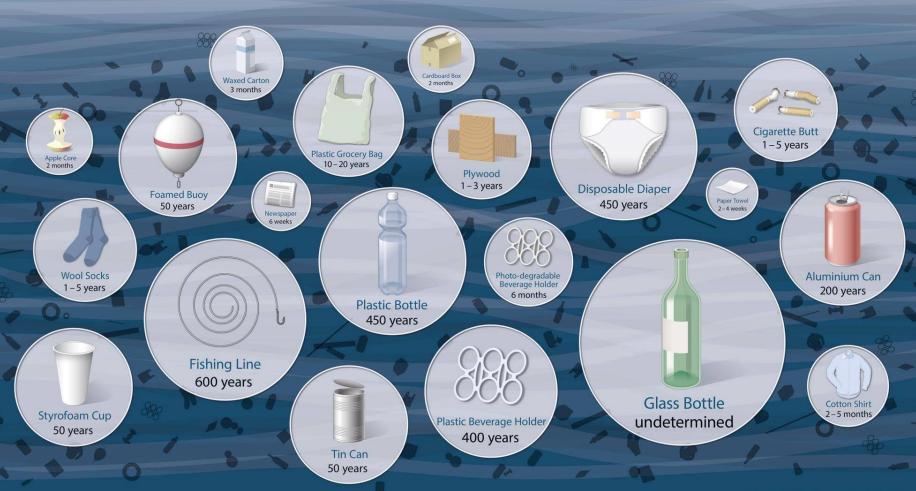




HOW LONG UNTIL IT'S GONE?



Estimated decomposition rates of common marine debris items



Estimated individual item timelines depend on product composition and evironmental conditions

Source: NOAA (National Oceanic and Atmospheric Administration), US / Woods Hole Sea Grant, US Graphics: Oliver Lüde / Museum für Gestaltung Zürich, ZHdK

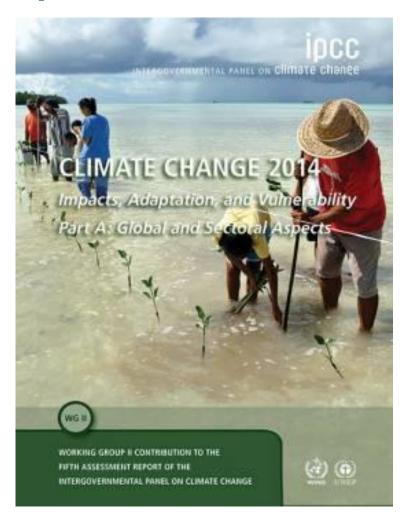


Food is first to be hit by climate change, possibly badly

"Increasing magnitudes of warming increase the likelihood of severe, pervasive, and irreversible impacts.[...] Global climate change risks are high to very high with global mean temperature increase of 4°C or more above preindustrial levels in all reasons for concern (Assessment Box SPM.1), and include severe and widespread impacts on unique and threatened systems, substantial species extinction, large risks to global and regional food security, and the combination of high temperature and humidity compromising normal human activities, including growing food or working outdoors in some areas for parts of the year (high confidence). "

IPCC. Climate Change 2014: Summary for

IPCC, Climate Change 2014: Summary for policymakers.



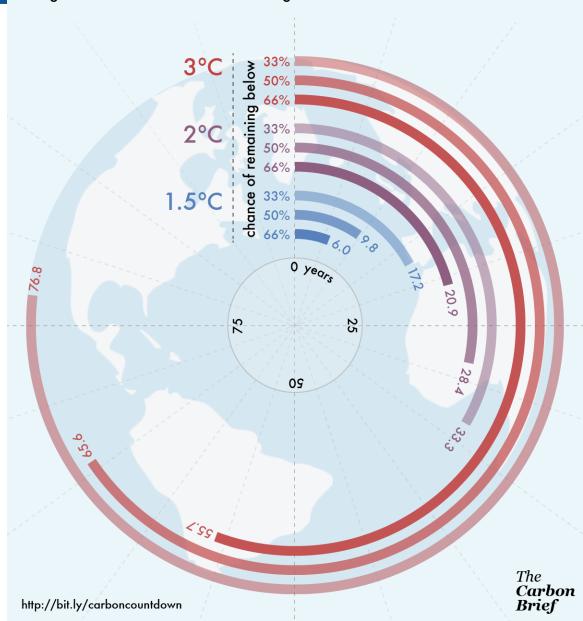
Six years left to remain confidently (66%) below 1,5°C with current emission levels

- 21 years to remain below 2°C
- > 3°C warmer in 2070

http://www.carbon brief.org/the-ipccspriorities-for-thenext-six-years-1-5c-oceans-citiesand-food-security

Carbon Countdown

How many years of current emissions would use up the IPCC's carbon budgets for different levels of warming?





COP21: The role of bioeconomy

- Deep de-carbonisation not possible without the bio-economy:
 - ➤ Replacement of fossil resources for energy, fuels, chemicals, materials (plastics) by sustainably produced biomass and waste within planetary boundaries without compromising food security
 - ➤ Biomass production (agriculture) is major source of GHG emissions (mainly ruminants; fertilizer production) but also possible sink of CO2 (forestry, soils, CCU)
 - Major innovations needed to address deep de-carbonisation in bioeconomy
- Energy Union Research, Innovation and Competitiveness Strategy (EURICS)



Bioeconomy and Circular Economy

The Bioeconomy Strategy is of high relevance to the CE package:

- ➤ The package includes sectorial chapters on "biomass and biobased products" and on "food waste";
- ➤ The package includes as an action "the assessment of the contribution of the 2012 Bioeconomy Strategy to the circular economy and to update the Strategy if necessary";
- Proposal to make the separate collection of bio-waste mandatory under conditions, and to ban the landfilling of separately collected waste.
- → Other relevant bioeconomy aspects for the circular economy are sustainable production, biodegradability, use of bio-waste, new circular value chains, etc.



EU Bioeconomy Action Plan

Investment in R&I



Policy interaction & stakeholder engagement



Enhancement of markets and competitiveness in bioeconomy



- Horizon 2020
 - 3.8 bn €
- Increase multidisciplinary & cross-sectoral R&I
- Smart Specialisation
- EFSI

- Bioeconomy Panel
- Bioeconomy observatory
- EU Policy coherence
- Development of regional and national bioeconomy strategies
- International cooperation

- Sustainable intensification of primary production
- Expansion of new markets
- Increase EU competitiveness
- BBI JU
 - 3.5 bn €

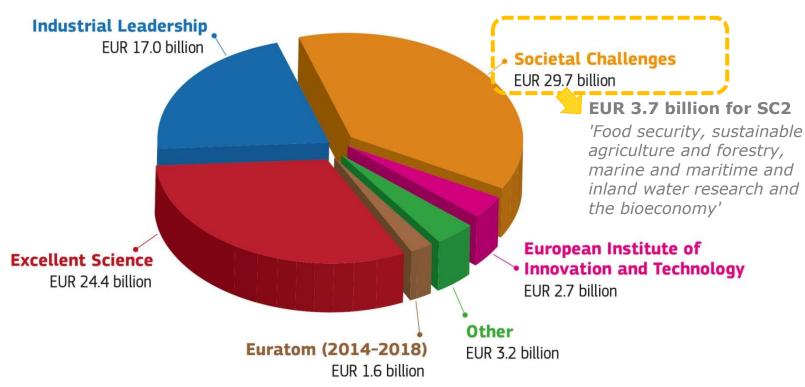




Funding Research & Innovation

HORIZON 2020 BUDGET (in current prices)

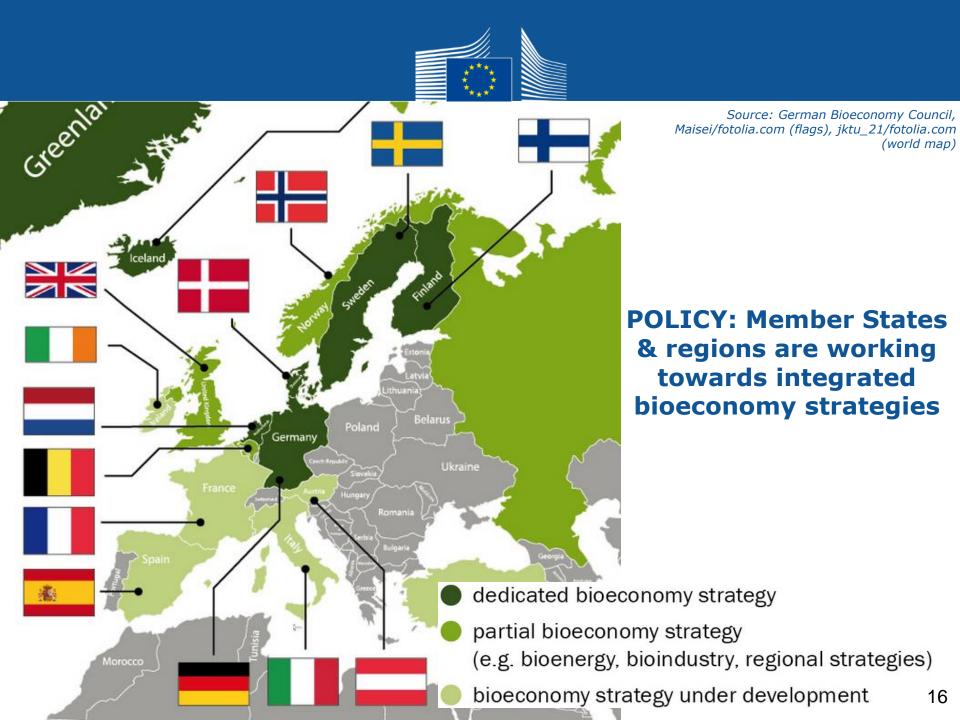
For period 2014-2020



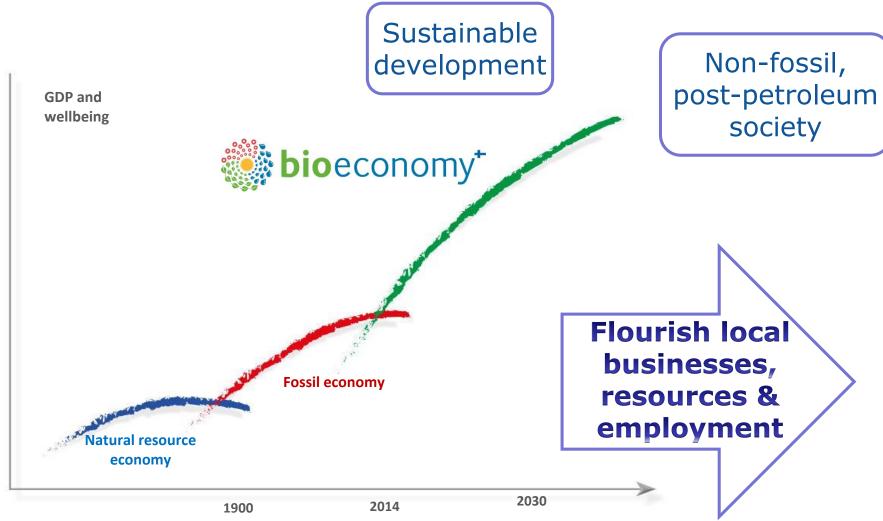


INVESTMENT: €3,7bn BioBased Industries Public- Private partnership 2014-2020

- €975 million of EU funds (Horizon 2020), leveraging €2.7 billion of private investments
- Value Chains: Forest, Woody, Agri, Municipal, Energy, Marine
- Demonstrators, breakthrough research, Flagships







Source: Finnish Bioeconomy Strategy, 2014



Engagement stakeholders: 4th Bioeconomy Stakeholders Conference

- To foster buy-in from all stakeholders
- As outcome a concept Bioeconomy
 Stakeholders' Manifesto that lists key:
 - Challenges and opportunities, Guiding Principles, Actions
- Actions focusing primarily on contributions stakeholders themselves can make
- Deliberated upon by the renewed Bioeconomy Stakeholders' Panel



 2017 Building Europe's Bioeconomy – a strategy for sustainable innovation, reindustrialisation





Research and Innovation
Future-proofing our Nutrition and Food Systems



Nutrition & Food Systems face "perfect storm"



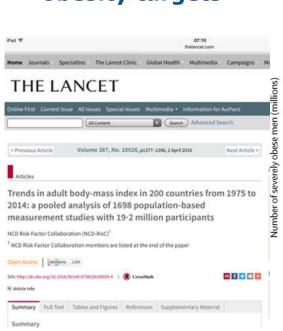


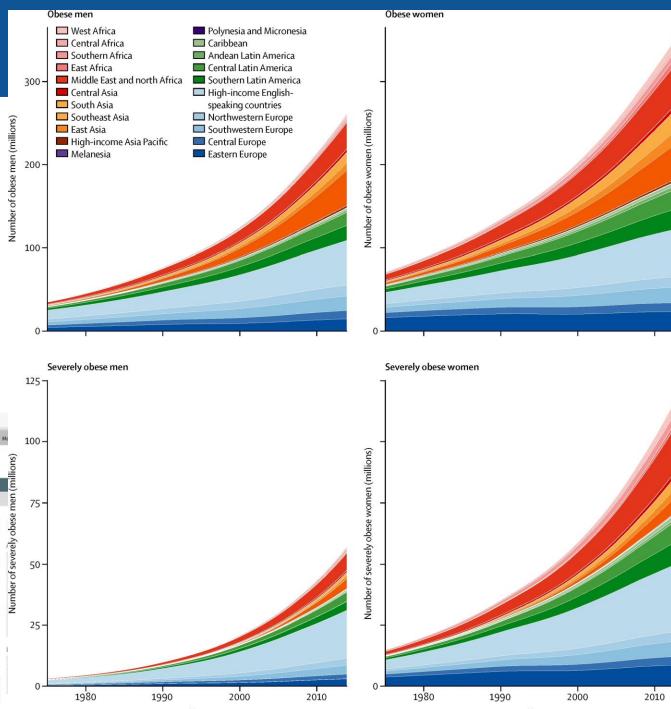




Today globally more obese than undernourished (Lancet 2016)

With current trends zero chance to meet obesity targets









Political Opportunity

Juncker Priorities



SDGs Post-2015



COP21



World Food Day 2016

Climate is changing.

Food and agriculture are too.

IPCC







Opportunities for R&I Breakthroughs

Aquaponics Re-use-of-food-waste
Climate-resilient-crops Smart-Personalised-nutrition
Food-fortification Biosensors-in-agriculture
Organics Smart-Precision-FarmingNew-food
Multifunctional-business-modelsScaling-up-aquaculture
Artificial-Photosynthesis_{Insects} Food-water-health-energy-nexus
Drone-food-delivery Alternative-sources-of-protein
Off-shore-agricultureFood-industry-innovation
Urban-agriculture
Plant-based-meat-similars
Sustainable-food-cities3-D-food-printing
usiness-modelsSoil-carbon-capture
Microbiome Agroforestry
Circular-farms

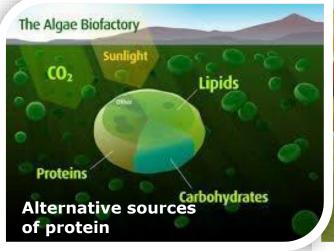


The Innovation Opportunity















FOOD 2030 CIRCULARITA

The Investment Opportunity

- EU Industrial R&D Investment gap persists despite challenges and opportunities (JRC, FoodDrinkEurope, EC)
 - Overall corporate R&D intensity gap widens (2005-2013)
 - Low investment in EU R&D food industry vs. US and Japan
 - Low uptake of EFSI by EU agri-food sector
- Studies show it would have been profitable to have invested more in Agricultural R&D (OECD, Purdue University)
- At the same time:
 - Cost (to society and business) of not acting is high
 - Global venture capital investments into agri & food increased from 0.9 to 4.6 bln USD (2013-2015, AgTech Funding Report 2015)





FOOD 2030

- 1. To promote a systems approach to research and innovation,
- 2. To better **structure**, **connect and scale-up EU R&I**, in a global context
- 3. To **step-up EU investment** ambition (public and private)
- 4. To mobilise international stakeholders to **tackle global societal challenges**

NEED FOR NEW LEVEL OF AMBITION, IMPACT AND FOCUS



FOOD 2030 Priorities



Nutrition: Reducing hunger & malnutrition, addressing food safety and diet-related diseases, and helping citizens adopt sustainable diets and healthy lives



Climate: Building a climate and global change-resilient food system



Circularity: Implementing sustainability and circular economy principles across the whole food system



Innovation: Boosting market creating innovation and investment, while empowering communities





FOOD 2030 Drivers



Open Innovation -> Investment, Regional, Private sector collaboration (e.g. Smart Specialization Agri-Food Platform)



Open Science -> Open access and data sharing; engagement, education & skills (e.g. Microbiome)



Research Breakthroughs -> ICT, Food systems science & transdisciplinarity (e.g. smart personalised nutrition, consumer behaviour, multi-actor approach)



Open to the world -> Global collaborations; MS R&I alignement and support (e.g. International Bioeconomy Forum, ASEAN aquaculture)



Participate in FOOD2030-debate

By joining the FOOD2030 conference

12-13 October 2016, Brussels (webstreaming available)

- Participation of Commissioners Moedas & Hogan confirmed
- P. Bulcke (CEO Nestlé) confirmed
- Innovators, entrepreneurs, panels on nutrition for healthy and sustainable diets, climate-resilience and circularity, investments & innovation.

http://ec.europa.eu/research/conferences/2016/food2030



#FOOD2030EU

By engaging with us to share your ideas



Perspective of research organisations Some checkpoints for implementation

- > **System approach** (e.g. food system, connecting land and sea, etc.) to capture complexity, interconnectedness and holistic perspective
- > Inter- and transdisciplinary cooperation to break up silos
- **Embedding social sciences & humanities** to ascertain societal relevance and consider socio-economic and cultural dimensions
- Connecting or converging with ICT to unleash potential of digital revolution
- Linking and integrating research with innovation (all types of innovation including technological, social, business model, governance, institutional, etc.) to create solutions for products, processes, services, policies, etc.
- Multi-actor approach and beyond to embrace perspectives of multiple stakeholders
- Stronger engagement with and of citizens to enhance co-creation and societal acceptance
- Public-private cooperation, possibly with involvement of new actors and young crowds, to unleash disruptive and market creating innovation
- Moving results to market, policies or society to develop job and growth opportunities and enhance impact on tackling global societal challenges



Concluding thoughts

Drivers for success

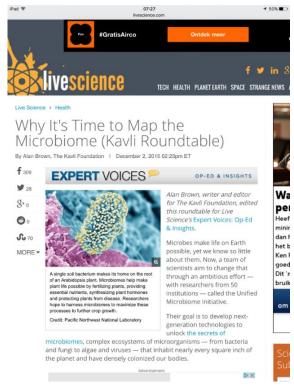


Research Breakthroughs

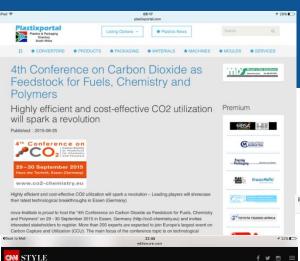
Example Microbiome







Understanding the microbiome of our biosphere



Spreading like wildfire: Why wooden skyscrapers are springing up across the world



By Jenni Marsh, CNN



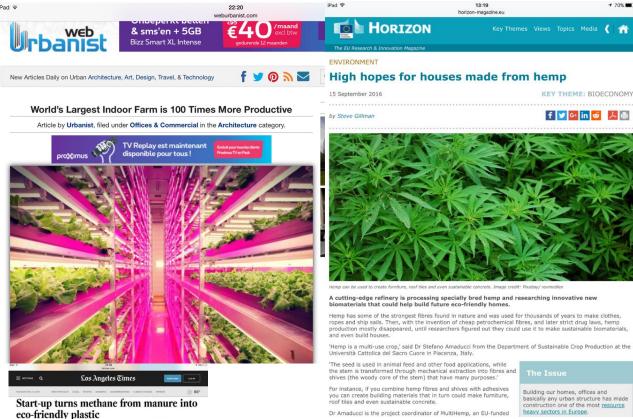


Aquaculture: Growup Urban Farms (London) http://growup.org.uk/growup-urban-farms



Disruptive innovation

creating new markets





Market creating regulation, standards, procurement



France just became the first country to ban all plastic plates, cups, and utensils

Go France!

BEC CREW 19 SEP 2016





France just passed a law that says all plastic plates, cups, and utensils will be banned by 2020, and replacements will need to be made from biologically sourced materials that can be composted.





BioBased Economy > Research > Open-Bio > What is the project about?

Open-Bio: Opening bio-based markets via standards, labelling and procurement

Open-Bio is the follow-up project to the FP7 research project called KBBPPS (Knowledge Based Bio-based Products' Pre-Standardization) and kicked off in November 2013. It comprises a broader consortium consisting of the KBBPPS group and a number of new partners, bringing in expanded expertise. Open-Bio builds on the results of KBBPPS, refining them and developing further knowledge on implementation of the standardization result in relation to market development.

Open-Bio investigates how markets can be opened for bio-based products through standardization, labelling and procurement. Therefore, one focus is on the sustainability of the bio-based resources and potential testing methods for this criterion. The end-of-life research will be expanded to different biodegradation scenarios, composting and recyclability. Functionality testing will focus on the gaps identified by KBBPPS and on the special properties of bio-based products.

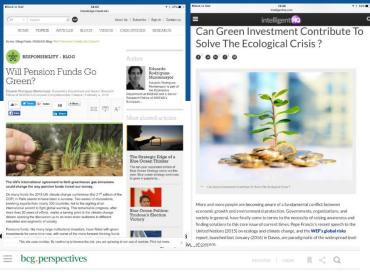
The results of Open-Bio will be fed directly into the current standardization processes of



News

Partner events:

Public procurement workshop organised by the EC Expert Group on Bio-based Products





Investors Care More About Sustainability Than Many Executives Believe

ODIES SUSTAINABILITY STRATEGY

E3 ADD TO INTERESTS & SAVE CONTENT @ PRINT O'T'O



Sustainability is increasingly important for investors, as evidence mounts that companies' environmental, social, and governance performance has an impact on

BCG's seventh sustainability report in collaboration with MIT Sloan Managemen Review found that 75% of senior executives in investment firms see a company's sustainability performance as materially important to their investment decisions-and nearly half would not invest in a company with a poor sustainability track record. However, only 60% of managers in publicly traded companies believe that good sustainability practices influence investment decisions.

The report. Investing for a Sustainable Future: Investors Care More About Sustainability Than Many Executives Believe, is based on a survey of more than 3,000 executives and managers from more than 100 countries

A key factor in investors' increasing engagement with sustainability is the greater availability of data. In the past, limited access to information forced sustainabil focused investors to take a more exclusionary approach, identifying and shunning and more sophisticated analytics, can have a more inclusive and nuanced perspective. Furthermore, the ability to access and analyze more data has revealed that sustainability and performance are not mutually exclusive: 75% of investors now think that increased operational efficiency often accompanies sustainability progress.

The disconnect between investors' and managers' perceptions means that too few companies are prepared to attract sustainability-savvy investors. The research showed that although 90% of executives see sustainability as important, only 60% of companies have a sustainability strategy in place, and just 25% have developed a clear sustainability business case that can serve as a compelling story for investors.

The report suggests several steps business leaders can take:

- · Build awareness of sustainability challenges and programs—both within companies and among stakeholders, including investors.
- · Identify and analyze the material sustainability issues that can affect performance and align the organization to ensure an integrated response
- · Invest in and focus on tangible and measurable sustainability outcomes instead of positions on ratings lists.
- · Formulate a sustainability strategy and incorporate it into the overall corporate strategy, including a clear business case.
- Engage investors and a broad range of stakeholders to discuss the company's sustainability strategy and progress

To Contact the Authors

Arison Professor of Values Leadership, George Mason University

Executive Editor, MIT Sloan Management Review's Big Ideas initiatives





Future-proof investments



In collaboration with

BCG

by: Gregory Unruh, David Kiron, Nina Kruschwitz, Martin Reeyes, Holger Rubel, and Alexander Meyer zum Felde

Investors see a strong link between corporate sustainability performance and financial performance — so they're using sustainability-related data as a rationale for investment decisions like never before.

Investing For a Sustainable **Future**

Investors see a strong link between corporate sustainability performance and financial performance - so they're using sustainability-related data as a rationale for investment decisions like never before.

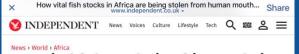
By Gregory Unruh, David Kiron, Nina Kruschwitz, Martin Reeves, Holger Rubel, and Alexander Meyer zum Felde

EXECUTIVE SUMMARY

Many executives embrace the conventional wisdom that mainstream investors care little about an organization's performance on environmental, social, and governance (ESG) metrics. Few companies make it a priority to communicate their sustainability performance to investors, or even develop a robust story about their sustainability performance. Why should they? Investors won't shift their investments, the thinking goes, based on a company's ESG performance. However, a growing number of investors are paying attention to ESG performance, as evidence mounts that



REPRINT NUMBER 57483



How vital fish stocks in Africa are being stolen from human mouths to feed pigs and chickens on Western factory farms

Exclusive: With soaring meat consumption around the world, vital omega 3-rich fish stocks destined for human mouths in western Africa are being snatched by foreign food companies to feed factory-farmed animals - and ultimately the populations of wealthier countries

n Wickens | Monday 19 September 2016 | 🖵 167 comments















Responsible **business models**



into the European Union

WFRA

States' obligations and victims' rights



entrepreneur.com

Etrip

"In certain sectors of the economy, the exploitation of workers who move within or into the EU has become business as usual. Workers coming from other Member States or from third countries perform labour in conditions that offend against human dignity. This happens in agriculture, forestry, fishery, construction, catering, the textile industry, domestic work and other sectors."



Inclusive societies

iPad ♥ 12:05

a theparliamentmagazine.eu

EPARLIAMENT***





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Food aid in Europe at scale 'not seen since the second world war'

Written by Edward McMillan-Scott MEP on 2 April 2014 in News

European citizens' growing reliance on food banks is 'unacceptable', and the EU must ensure our populations are able to enjoy a healthy and affordable diet, argues Edward McMillan-Scott.



There is justified concern over the growing reliance on food banks in the UK and across the European Union. We should consider it as a symptom of a broken food system which requires a complete overhaul. We need a sustainable food policy across the EU, where often prosperous farmers will get €350hn over the next seven years, while the most deprived get a meagre €3.5bn.

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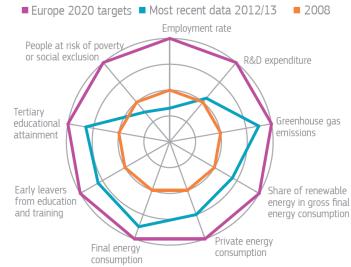
*A fortnightly mag delivered to you a packed with the la opinion and analy - purchase a subs

MEP Awards: Video hiç



Source: Eurostat,

http://ec.europa.eu/eurostat /documents/2995521/66641 32/1-02032015-CP-EN.pdf/e339ff6c-ee5c-4385-9cbc-bce32fbdb8d7





Inclusive Growth

There is an urgent call for governments to address inequalities.

In many countries, people have not seen their incomes rise for years. The gap between rich and poor has widened, with those at the top capturing the 'lion's share' of growth. Rising inequality in earnings and in wealth is a major concern, but money is just one aspect of people's well-being. In just about every area, whether it be education, life expectancy, or employment prospects, success is determined by socio-economic status, wealth and assets, sex, age or the places where people live.



Share

~





European Commission

Engaged citizens in science, innovation, society







http://pm22100.net/pages/enercoop/I/Incredible edibles.html







Giving citizens a greater role in science can deliver the vision

of "science for the people, by the people" for Europe. Some of





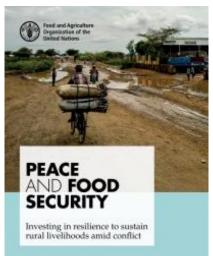
Security "by design"

Address root causes of unrest, conflict, migration

"Nexus thinking is eloquent and compelling on the subjects of efficiency and innovation, but silent on the topics of equity and security. The billion plus people who remained destitute at the end of the twentieth century have now migrated into peri-urban squalor, lost land, assumed debts, remained illiterate, acquired drugresistant pathogens, grown in numbers, and amassed cheap Cold War weapons and mobile phones.[...].

It would be wise to add equity and security to the nexus."





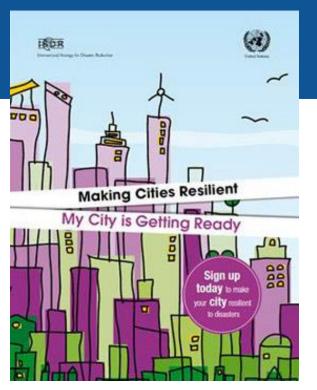


Beyond The "Water-Food-Energy-Climate Nexus"

In order to improve our environmental security, should we think of water, food, energy and climate in nexus-like ways? Richard Matthew is skeptical. While "nexus thinking" promises to reduce waste and inefficiency, it could also heighten inequality, instability and the potential for violent conflict.

In the past five years, a powerful narrative of global environmental rescue has been crafted by leaders from business and government.

http://www.water-energyfood.org/en/news/view 1696/beyond-the-waterfood-energy-climate-nexus.html



https://www.hud.ac.uk/research/researchcen tres/gdrc/internationalcollaborationsandnetwo rks/unisdrmakingcitiesresilientcampaign/



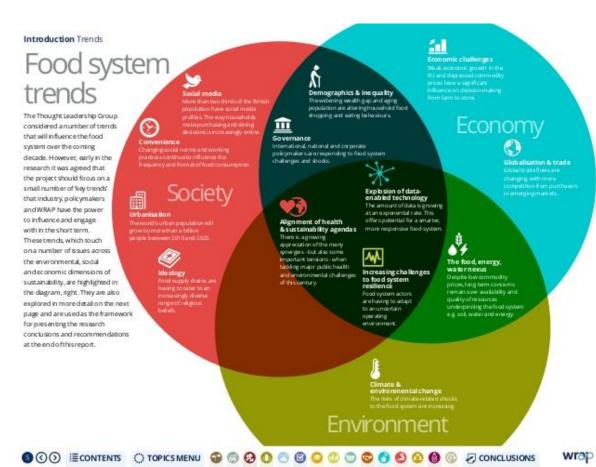


www.stockholmresilience su se

Stockholm Resilience Centre University



Resilience



Source: WRAP,

http://fr.slideshare.net/sustainablebrands/food-futures-

from-busin



IFIB 2016: Sustainability is the single largest business opportunity of this generation

24 September 2016 & Il Bioeconomic

肯肯肯肯肯 @ 4 Votes



nomy is alive and is set to grow. This is the strong message coming from Vicenza, Italy, whe

FOOD FOR THOUGHT

European

Commission

Is Sustainability a sine qua non?

Social

Bearable Equitable

Sustainable

Viable Economic

"In practice, sustainability refers to efforts to align economic development with environmental protection and human wellbeing. Sustainability is commonly characterized in terms of the interdependence among three broad dimensions— environment, economy, and society—while considering both present and future generations. The diagram to the right represents these dimensions as nested, with a resilient and robust economy existing within a healthy society dependent on an intact and functional environment."

Economy, Society, Environment: A Nested Relationship



https://cfpub.epa.gov/roe/sustainability.cfm



FOOD FOR THOUGHT

- How to achieve sustainable and inclusive biosphere management for prosperity, wellbeing, jobs and growth?
 - How to make the human-influenced age of the Anthropocene a success?







Thank You



Building Europe's Bioeconomy



FOOD 2030: Research & Innovation for Tomorrow's Nutrition & Food Systems