

PANOS (PANAYIOTIS) CHAMAKIOTIS

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The Future
Of Obvious Disruption

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PANOS (PANAYIOTIS) CHAMAKIOTIS

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The Future
Of Obvious Disruption

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ΕΝΑ ΓΡΑΜΜΑ ΣΤΟ ΝΕΟΤΕΡΟ ΕΑΥΤΟ ΜΟΥ

NFT



Αγαπημένε, νεότερε εαυτέ μου,
Είναι Σεπτέμβριος του 2003.

Ξέρω ότι είσαι συγκινημένος, φορτισμένος συναισθηματικά, προβληματισμένος, σε σύγχυση απ' όσο μπορώ να καταλάβω, με ανασφάλεια για το αύριο. Με κάποια άγνοια ρίσκου, μόλις πήρες την απόφαση να αφήσεις μετά από πολλά χρόνια την 'σίγουρη' εταιρεία και τους συναδέλφους που ανδρωθήκατε επαγγελματικά για πολλά χρόνια μαζί, να αηλιάξεις ριζικά μια πολύ καλή και ασφαλή καριέρα που είχες, και αυτό για μια νέα περιπέτεια, μια πορεία από το 'μηδέν' σε μια εταιρεία που κανείς δεν την ξέρει στον χώρο, που όλοι αναρωτιούνται και προβληματίζονται στην αγορά τον πραγματικό λόγο που φεύγεις (ακόμα και μετά από 20 χρόνια θα ρωτάνε, πίστεψέ με), που όλοι τη θεωρούν μια τρελή κίνηση, ένα μεγάλο ρίσκο που 'δεν θα βγει' και όλοι θα ψάχνουν τους λόγους και τις αιτίες για την απόφασή σου αυτή.

Είμαι όμως εδώ για να σου πω να μην απογοητεύεσαι, να μην αγχώνεσαι. Ακριβώς το αντίθετο μάλιστα!
Θα πρέπει να είσαι πολύ περήφανος και να χαμογελάς πολύ πλατιά, θα πρέπει μόνο να σκέφτεσαι ότι μάλιστα

άρησες να κάνεις αυτό το βήμα και ότι τώρα το μόνο
θα πρέπει να ετοιμαστείς ψυχολογικά και σωματικά είναι
να καλωσορίσεις το υπέροχο ταξίδι που μόλις αρχίζει,
τις εμπειρίες που θα αποκτήσεις τα επόμενα 20 χρόνια
καθώς και να ευγνωμονείς το γεγονός ότι με την από-
φαση αυτή θα ανακαλύψεις τις πραγματικές σου αρετές.

Πίστεψέ με, το παραμορφωτικό επαγγελματικό περιβάλ-
λον που ζούσες και που βασίζεται κυρίως στη δύναμη
της εταιρείας στην αγορά (που προέρχεται από την
παγκόσμια θέση της και τις διεθνείς συμφωνίες της)
και όχι στην καθοριστική συμβολή, την προσωπικότητα
ή την ποιότητα των ανθρώπων, είναι μία συνθήκη που
δεν σου αρέσει και θα επιλέξεις να μην θέλεις να
λειτουργείς, δεν ταιριάζει στην αξία σου και δεν σου
επιτρέπει να αναπτύξεις και να αναδείξεις στον βαθμό
που σου αξίζει τις πραγματικές σου ικανότητες που ούτε
εσύ ίσως γνωρίζεις ότι διαθέτεις. Από την άλλη, η από-
φαση αυτή θα σε οδηγήσει σε επαγγελματικά μονοπάτια,
σε περιοχές και υψηλότερες κατακτήσεις που ούτε κατά
δίανοια μπορείς να φανταστείς. Θα ξεκινήσεις από μία
'ανύπαρκτη' στο χώρο εταιρεία όπου θα ανδρωθείς επαγ-
γελματικά και θα αναγνωρισθείς ως ένας επιχειρηματίας

στην αγορά και όχι ως ένα απλό επιτυχημένο στέλεχος πολυεθνικής.

Θα γνωρίσεις ένα πολύ δύσκολο επαγγελματικό περιβάλλον αλλά και έναν πολύ έξυπνο άνθρωπο και ανοιχτό μυαλό -τον ιδιοκτήτη- που θα σε πιστέψει και θα κάνει θαύματα. Θα μάθεις να δημιουργείς και να κερδίζεις από το τίποτα, θα δημιουργήσεις ένα μοναδικό blockbuster για την Ελληνική αγορά. Εκεί θα μάθεις να φτιάχνεις μια εταιρεία από το μηδέν, θα μάθεις να παρακολουθείς τους πραγματικούς αγωνιστές, θα δεις τον 'αληθινό' κόσμο τη αγοράς και θα γίνεις ολοκληρωμένος επαγγελματίας που βασίζεται στις δικές του δυνάμεις για να ξεπεράσει και τελικά να νικήσει μόνος του τις προκλήσεις και τις δυσκολίες.

Μετά, αναπάντεχα, θα ταξιδέψεις σε πολυεθνική εταιρεία -και πάλι- και, ετοιμάσου καλά γιατί θα μείνεις πολύ καιρό εκεί, ετοίμασε και διαβατήρια γιατί θα ταξιδέψεις πολύ και παντού. Αυτή η εταιρεία θα σε βοηθήσει πραγματικά να ξεδιπλώσεις το μεγάλο ταλέντο σου σε θέσεις πολύ μεγάλης ευθύνης. Στην αρχή θα συναντήσεις ένα περίεργο εταιρικό κλίμα, ξένο στον

καρκτήρα σου, που δεν βοηθάει την ανάπτυξη των ανθρώπων και στηρίζεται σε πρόσκαιρες, προσηματικές σχέσεις που όλοι χάνουν. Σύντομα θα έρθουν πολύ μεγάλες αλλαγές στην εταιρεία αυτή παγκοσμίως που ούτε μπορούσες να φανταστείς όταν ήγυαίνες, που θα αλλάξουν ριζικά την εικόνα της στην αγορά και θα σε κλονίσουν πραγματικά αλλά που θα είναι η πιο μεγάλη πρόκληση για σένα για να γίνεις καλύτερος ηγέτης.

Θα επικρατήσεις απόλυτα και πεντακάθαρα μέσα σε εξαιρετικά δύσκολες συνθήκες και χτυπήματα κάτω από τη ζώνη και θα αλλάξεις ριζικά και εντυπωσιακά την ιστορία και το μέλλον της εταιρείας αυτής στην Ελλάδα, θα κάνεις τέτοια επιτυχία που κανείς δεν περίμενε ότι θα συμβεί. Αρχικά θα σε στηρίξει από το εξωτερικό ο πολύ καλός Γενικός Δ/της παγκοσμίως της εταιρείας, θα σε βοηθήσουν κυρίως οι άνθρωποι που απέμειναν στην εταιρεία, και κάπου εκεί θα πάρεις την ομάδα μόνος εναντίον όλων στην πλάτη σου και θα γίνεις γνωστός ως ο game changer στην αγορά.

Εκεί θα φτιάξεις από την αρχή μια αποτελεσματική ομάδα, θα έχεις την τύχη να έχεις καλούς και ικανούς

ανθρώπους με ταλέντο γύρω σου, θα τους εμπνεύσεις και θα εμπνευστείς, θα επιτύχεις μαζί τους εκπληκτικά αποτελέσματα μέσα στην μεγάλη οικονομική κρίση της χώρας, θα αποκτήσεις πολύ περισσότερους φανατικούς οπαδούς, ακόμα και οι όποιοι εχθροί σου που θα έχουν απομείνει θα 'λουφάζουν' για πολύ καιρό.

Μετά, θα φύγεις από την Ελλάδα, θα συμβούν σαρωτικές και αναπάντεχες αλλαγές στην εταιρεία, πρόσκαιρα θα απογοητεύεσαι αλλά εσύ θα κατακτήσεις σπουδαίες θέσεις στην παγκόσμια ιεραρχία της εταιρείας και θα αποκτήσεις πολύ μεγάλη φήμη, θα ξεφύγεις πολύ μπροστά. Μέσα από ανατροπές και αλλαγές ιδιοκτησίας θα αναγνωριστεί από όλους η μεγάλη αξία σου παγκοσμίως, θα έχεις τη μεγάλη τύχη να γνωρίσεις σπουδαίους επαγγελματίες όπως ο καταπληκτικός επιχειρηματίας, Πρόεδρος και CEO της εταιρείας παγκοσμίως που θα σε σπρώξουν σε πολύ ψηλότερα επίπεδα, και θα μάθεις να παλεύεις κάθε μέρα να κατορθώνεις το 'αδύνατο' και να βελτιώνεις, να νικάς τον παλαιότερο εαυτό σου και μόνον αυτόν. Θα ηγηθείς σε ποιοτικές ομάδες με σπουδαίους επαγγελματίες και μαχητές από όλο τον κόσμο που θα σε μάθουν να γίνεσαι όλο και καλύτερος, όλο και δυνατότερος και θα

σε βοηθήσουν να κατακτήσεις τα υψηλότερα σκαλιά στην εταιρική ιεραρχία παγκοσμίως και να αποκτήσεις τον μεγαλύτερο βαθμό επιρροής που είχε ποτέ Έλληνας στον δικό σου χώρο την τελευταία 20ετία.

Θα είσαι πολύ τυχερός να τους γνωρίσεις όλους αυτούς από κοντά και ξέρω ότι θα τους ευχαριστείς πάντα γιατί θα παίξουν ένα σημαντικό ρόλο στην δική σου εξέλιξη. Θα τους χρωστάς, θα δημιουργήσεις και αρκετούς άλλους ηγέτες και θα τους βοηθάς συνέχεια και χωρίς ανταλλάγματα γιατί έτσι είσαι εσύ. Θα ταξιδέψεις όλο τον πλανήτη, θα δημιουργήσεις νέες αγορές, θα γνωρίσεις διαφορετικές κουλτούρες θα γράψεις μάλιστα και βιβλία που θα μιλάνε για το αύριο του χώρου σου, θα μπορούσες ποτέ να το φανταστείς αυτό σήμερα?

Όσο για τα προσωπικά τι να πω, είσαι ευλογημένος νεότερε εαυτέ μου... Θα παντρευτείς ένα χρόνο μετά, το 2004, μια σπουδαία γυναίκα, την σύντροφο που θα την θαυμάζεις, θα σε εμπνέει και θα σε μάθει να επιθυμείς να παλεύεις καθημερινά να βρίσκεις και να διεκδικείς την προσωπική σου δύναμη, να ψάχνεις να εντοπίζεις και να αναγνωρίζεις τις δικές σου περιοχές βελτίωσης και

να ξεπερνάς τις λανθασμένες πεποιθήσεις σου.

Το 2011 δε, θα είναι η σημαντικότερη χρονιά της ζωής σου αφού θα φέρετε στον κόσμο την λατρεμένη σου κόρη που θα σε αλλιάξει οριστικά προς το καλύτερο και ...τίποτα πιά δεν θα είναι το ίδιο για σένα μετά από αυτή την ημερομηνία.

Ίσως τώρα που διαβάζεις αυτό το γράμμα να πιστεύεις ότι όλο αυτό είναι ένα όνειρο, ένα παραμύθι αλλά θα δεις ότι όλα θα γίνουν ακριβώς όπως στα περιγράφη, φρόντισε λοιπόν να είσαι αντάξιος αυτής της υπέροχης πορείας.

Απόλαυσέ το πραγματικά όλο αυτό, να είσαι χαρούμενος, να είσαι ταπεινός, να είσαι ευγνώμων! Και κάτι άλλο... Το ταξίδι αυτό θα συνεχιστεί εντυπωσιακά και μετά από αυτή την ημερομηνία που σου γράφω...

Εσύ -όπως πάντα- είσαι μόνος σου στο ταξίδι αυτό και εγώ είμαι αληθινά, παντοτινά δικός σου!

Ιούλιος 2022,

Παναγιώτης

C O N T E N T S

ACCOLADES	12
PREFACE	28

PILLAR 1: THE MODERN AGROFOOD BUSINESS, COUNTRIES & PRACTICES	41
--	-----------

- Leaders and Followers.....42
- Exploiters of the land.....56
- The perfect blend.....78
- The Global Distribution Channels.....90
- What is the biggest "southeast European" land?.....106

PILLAR 2: INEFFICIENCIES IN SUPPLY CHAIN, TRADE, CLIMATE AND -LATELY- OF PANDEMIC THREATS	131
--	------------

- Experiencing the unexpected.....132
- The transition from Agriculture to Agrifood.....152
- The road to South.....168
- In searching for the promised Land.....176

PILLAR 3: PHILOSOPHICAL ORIENTATION OF THE AGRIFOOD SECTOR	187
---	------------

- Uncertainty, Fear, Risk and the Unexpected.....188
- Is this covid19 crisis bothering you?.....206
- Countdown to the next pitfall.....224
- Eating soup with the knife.....230
- The Root and the Drone.....244
- Innovation and entrepreneurship, the response
to the rural crisis.....252
- Walk the Talk.....260
- Companies vs. Countries vs. Crisis vs. Culture.....273
- Creating the Agro Silicon Valley.....284
- We come and go to life alone.....290



—○—
ACCOLADES
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This book provides a useful narrative about the European agricultural landscape, its diversity and provides good impulses how the challenges of the future could be approached.

THOMAS H. AHRENS

CEO of the COMPO EXPERT Group



This must read book highlights the importance of Agri-food modern production in bridging the nations' strategies and goals with the individuals' performance and attitudes who's the perspective on ethic leadership and new methodologies in absolute respect with nature will make a difference in the industry.

Panos 'practices what he preaches' and shows that his pragmatic approach can be used by leaders of all levels.

He offers sincere and thoughtful approach models for the strategies he advocates as well as practical advices that are immediately actionable.

Moreover, the articles are always well written, adhere to the brief and show a depth of understanding of the industry and what the player of the sector wants – valuable qualities in agricultural practices and also an objectivity to ensure information conveyed and business stories from different countries are correctly balanced.

I find the book very useful in tracking down various actors of the Agri-Food sector and I would highly recommend it to anyone that is looking for press and content coverage that promotes a sustainable vision and delivers measurable contribution in the terrain of modern Agriculture of today's and, especially, of tomorrow's.

MARTIN BERTINCHAMP

- *Former Chairman and CEO of COMPO
Expert,*
- *Former Chairman of COMPO,*
- *Chairman of the Board Of Nordwest
Handel AG Chairman of the Board of
Janoschka AG Chairman of the Board
of Schock,*
- *Chairman of the Board of
Elektroautomatik*



Panos' new book is a brilliant piece of work. It achieves to draw the attention of the reader just from the front page(!) with such a clever title and acronym (F.O.O.D = The Future of Obvious Disruption), which is simultaneously timely and timeless for the agricultural production. It starts describing the situation of current food management systems providing highly illustrative and lively examples from different countries both educational and intriguing. It continues with the vision of a new food management system capable to protect the environment and ensure food security and safety from the experienced perspective of Panos. The importance of new technologies in the whole system has also been a crucial element. What strucks my attention the most, though, is the ethical approach to food production system that focuses on the individual farmer.

All in all, I would like to congratulate Panos for his inspiring work, which will definitely make it mark on the food management system and inspire all of us. I am really proud of him realising that his efforts bore fruit!

DR. SPYROS FOUNTAS, Professor

- *Agricultural University of Athens*
- *Editor in Chief, Smart Agricultural Technology (Elsevier)*
- *MSc Cranfield University, UK*
- *PhD Copenhagen University, Denmark*



Directing the post graduate programme "MBA in Agribusiness" for several years, I had the opportunity to meet several entrepreneurs of the Agri-food industry. Some of them aroused my admiration and my respect. Panos (Panayiotis) is one of them.

His long experience in agrifood industry as Agricultural scientist with an Advanced Management degree, allows him to keep abreast of the most forward-looking results in his field, think more broadly and critically about how to transfer modern technology, develop new science that could lead to new business opportunities, and identify and recruit new talent.

I always believe that academic and entrepreneurial activities are not incompatible; in fact, I believe they go together and Panos has proved this in practice. CEOs like Panos, can open new doors to academics, helping them secure industry funding, for example, and collaborators. I would dare to characterize Panos as an Academic Entrepreneur

where in the frame of his "Academic" duties, he presents his second book.

This book is the proof that he does care for a new model for sustainable agriculture. A new model that employing technological novelties to make gaining by increasing soil vitality and fertility and reducing inputs, therefore, to get better returns with fewer inputs and much fewer environmental impacts.

STATHIS KLONARIS

- *Professor, Head of Department of Agricultural Economics & Rural Development and*
- *Director of postgraduate programme "MBA in Agribusiness"*



*I have enthusiastically completed reading your second book titled **"F.O.O.D – The Future Of Obvious Disruption"**. It is exceptionally well-written and creates many interesting suggestions on what the current leaders should deal with in the coming years in the field of Agriculture, Food, and Environment.*

The timing of this release is perfect, coinciding with the critical disruptions of the European and global food supply chain resulting from the Russian/Ukrainian conflict and necessitating a call to be creative and adopt unusual ways to make up for the shortage of food elements in multiple areas of the world relying on the resources of these two countries.

I particularly liked the fact that it is an objective look at the existing challenges in the management of modern Agro-Food business, pointing out the diversity in different agricultural habits and policies. You have explicitly addressed the need for implementing a different strategy leading to the

sustainable management of natural resources. I also appreciate the way you proposed to make a change where the cooperation between governments, farmers, scientists, and young generation by combining new technologies, intelligent agriculture, and entrepreneurial spirit is the only way that will ensure sustainable agriculture business advancement, economic growth and job creator in the Agri-Food Sector, and enough FOOD to feed a hungry world without disruption.

I would like to congratulate you on the brilliant idea of creating "Rural Agro Silicon Valley" in Greece which I do support and will do my best to implement in my home country.

*I look forward to reading your next informative work.
Thank you.*

KHALIL MELKI, PhD

General Manager and Shareholder



"F.O.O.D. - The Future Of Obvious Disruption" is a superb paper that becomes even more relevant to food production in the wake of the situation generated by the invasion of Ukraine. Its author, Panos Chamakiotis, once again hits the mark with his disruptive reflections.

In addition, the global project, which is contained in <https://thefoodproject.club/>, goes a little further and allows the exchange of opinions that is so necessary today to find the solution to the many unknowns that currently exist about the future of food production.

The entire food chain, from distribution to the producers of seeds, fertilizers, phytosanitary products, any input for agriculture, including farmers, livestock breeders and the food industry, must work together in a disruptive way to emerge victorious from this "perfect storm" generated first by the pandemic and now by the war in Ukraine.

Initiatives such as the one launched by Panos are a good opportunity to bring everyone together, and also with an international perspective, which is even more interesting. From Spain, I would like to congratulate the author and creator of the project for the initiative, offer him our collaboration to spread this philosophy in our country, and wish him the greatest success.

RICARDO MIGUELÁÑEZ

Agrifood Comunicación



This book is an open window which allows fresh air to come in our minds, it is nowadays more necessary than ever to take some time to analyze how agriculture and food industry are changing because we are living at the edge of an old time which is now giving birth to a new era. After pandemic years this world has changed and changes in agriculture are accelerating even faster. Society is asking for a sustainable agriculture, and it will only be possible if all its stakeholders can make profit, especially the weakest ones... the farmers. Farming is no longer an "old job" but a very technological science, full of new discoveries and applied science.

We want, we need, to produce more with less and improving efficiency is not an easy challenge. Behind this challenge there is a major one... in 2050 we need to be able to produce 70% more food if we do not want people suffer hunger and therefore we will need to feed plants with the right needed amount of nutrients, we will have to help them to stay balanced when the different biotic and abiotic stresses will hit

them (as we want them to do what they need to do at the right time or phenological stage) and for sure we will need to protect them against insects and diseases. We need to do all with the minimum cost, no impact for nature and keeping the highest quality standards in the production... who said agriculture was an easy issue?

Thanks to this book and my friend Panos, we open an opportunity for discussion about some key issues of today's agriculture which are brilliantly described along three different pillars.

SERGIO AGUILAR ROIG

*Vice President of Subsidiaries for EMEA
Stoller Group*



Many thanks for the interesting book which you have published recently. This document will help to further strengthen our image as a company and enlarge our business footprint.

*I wish you a lot of success and the necessary luck for it.
Best regards*

RUEDIGER SCHEITZA

*Former Chairman of Supervisory
Board of COMPO Expert*



This book presents very useful practical examples of the European agricultural landscape and shows that leaders must have the vision to deal with innovation and entrepreneurship in the coming years, to deal with modern Argo Food business. It identifies the challenges in the management in a game between global and local in terms of different agricultural habits, policies and culture, as well as presents new ideas, strategic vision and management tips, for setting sustainable development goals. The book's layout is really elegant, well worth the reading.

JOHN VONTAS

- *Director of Institute Molecular Biology and Biotechnology, Foundation for Research and Technology (IMBB-FORTH), Crete, Greece*
- *Professor Agricultural University of Athens*



○ ————— ○
PREFACE
○ ————— ○





In the past decade, two main developments have brought Agro-Food management issues to the fore. First has been the increased awareness of communities and nations on food safety and environmentally friendly technologies, not only for key operational purposes but also for gaining strategic advantage in a rapidly changing ecosystem and confronting the new challenges of food's supply chain. Second, abetted by information and communication technologies which are completely reshaping human intelligence and the whole agro business model's transformation for many countries and organizations. Whereas in the past societies could rely on confining themselves to a particular geographical area to conduct

their business, today business is increasingly becoming location independent, and all sector's players are finding themselves to be strategically disadvantaged if they are confined to a particular place without preparing to respect the global conditions while, at the same time, need to act locally and abiding domestic principles.

The consequence of advances in food chain industry and the changing boundaries of the knowledge have brought the importance of big data and information to the priority, because it is the absolute knowledge that helps Agro-actors realize their objectives when are responsible to feed others. Today because the nature of the agriculture and scope of products processing has evolved, the emphasis to the food harmony should be on establishing responsibility, integrity of people, trustworthiness, and ethicality. But the people who know the most about making farming more sustainable are farmers themselves therefore this is only possible if the farmers have the necessary means and access to credit their production and smoothly meet the markets requirements, by navigating within an ecosystem of extroversion, culture, knowledge spreading and of supportive policies - not only simply try to survive economically in an increasingly competitive world.

Ethic production of F.O.O.D is an interdisciplinary endeavour exactly when the global scope is to increasing agricultural productivity by incorporating modern and environmentally friendly technologies which will significantly contribute to the wellbeing of all.

Changing structures, application behaviours and the greater reliance of farmers on difficulties indeed poses a number of challenges for maintaining good food practices. But, instead of only focusing on advanced rule structures and technological innovations, establishing an adequate understanding of different behavioural practices and needs per region, it is fundamentally important to develop and implement adequate, modern initiatives and supportive policies for the sector.

Ripping up the 'traditional rule book' of agriculture is the main mantra for Agro-Food industry to meet the synthetic biology, the digital fabrication, robotics, internet of things,

nanotechnology, 3D printing etc. all these new technologies which are racing forward across the board and have the potential to massively increase human intelligence and reshape the industry and society.

Denial or sidestepping is the most dangerous phase for agro-actors because all these new models and technologies threaten to undermine their core business and destroy them if they have the false perception of still being in full control and continue the 'business as usual' attitude. Stephen Elop, ex-CEO of Nokia choked up in tears when he said: "We didn't do anything wrong. But somehow, we lost"

I firmly believe to the 'Agriculture -as -Service' concept and in the blockchain operation of a vibrant network of respectful cooperation where everyone is fully reliable and responsible for their own part of contribution for the best outcome. The key question that developed countries should answer if they want gaining from the huge impact of modern agriculture to their societies is to urgently build strategies for driving the transition from a product-centric to a service-centric business model endorsing strategies based on respect to the culture because is what creates the foundation for all future innovation.

I also believe to the model «10x4» when I want to describe what will come next to the people, they conveniently think are too big in the industry, too resilient to survive, too established and well rooted in today's status quo:

- Pay attention to the next 10 years
- Pay attention to the people have been born around 10 years ago and
- Pay attention to the business models that have less than 10 employees nowadays

If not, your business will soon be left 10 times behind others in less than 10 years from now.

The book is organized into three main wording clusters which, surprisingly, are interacting between their different (at first glance) meanings and the categories are rather mixing between them not necessarily in the same order but in piecemeal placement instead. Geographical areas, cultural and economic challenges, leadership learnings, different practices, ideas and examples of how making business in an ecosystem of constant changes and new-normal in the post-pandemic era are effectively blended - allow me to say- in an original way that I hope will intrigue the readers.

A brief description of each of the pillars follows:

Pillar 1

Identifies the existing challenges in the management of modern Argo Food business through different stories from different countries and practices. Diversity and unity in place in a game between global and local in terms of different agricultural habits and policies with culture as a common denominator. This category sets the scene for discussions raised due to various crop practices and attempts to identify the global orientation of sector and the related problems of the food security management.

**Facilitate external interaction
and leverage the network.**

Pillar 2

Establishes the need for a different strategy and presents a sample structure of ideas that may be used to develop such a policy. The contents of this category contend that by investing in the development of a strategic vision, a country and, similarly, business organization ensures the highest level of preparation and defence against all sorts of inefficiencies in supply chain, trade, climate and -lately- of pandemic threats. I claim that here seems to be reluctance on part of the administrations and leaders to fully commit to a workable and winning recovery plan. In most cases although there may be a few elements of the plan in place, little emphasis has been placed on drawing them together into a coherent policy. One aim of the category is to consider moral issues pertaining to FOOD distribution and articulate methods of thinking through various concerns.

Bypass dilatoriness and authated rules, remove friction and focus on the total value of the ecosystem.

Pillar 3

Tries to examine some challenges in ethical management of people, business and resources using my own experience and way of thinking. It suggests principles and gives tips necessary for managing yourself and business in the new environment. Allow me to say this category takes part of philosophical orientation for the sector and urges to the changes of the behaviour of the leading players to set sustainability at the core of their actions, therefore, to be leading a network of humans not of a 'machine' which contains human parts.

Aim = I Am

As a conclusion, this essay tries to promote some thoughts how the inefficiencies of today's Agro-Food pattern can be broken. The book proposes a number of approaches, through business examples from different countries market-based incentives and strategies that - although they cannot be adopted whole cloth but have to be adapted to different circumstances - would might encourage some market-chain players to achieve new levels of performance and shares ideas for how should orient themselves and act for the creation of sustainable agricultural practices.

We should do farming in harmony with nature rather than against.

We must use resources wisely and efficiently, to experiment with new crops, practices, and technological novelties to make gaining by increasing soil vitality and fertility and reducing inputs, therefore, to get better returns with fewer inputs and much fewer environmental impacts.

In this book, I have tried to provide a critical overview of the latest trends and future perspectives in FOOD industry by sharing ideas, providing examples and copying added value practices based on my travelling adventures. I also tried to demonstrate the 'obsolete practices of yesterday' which need to be urgently 'eXpired' if we want to become a successful part of a growing network rather than simply break evening in the sector.

The Future Of Obvious Disruption in Agro-food industry considering a rapidly changing ecosystem will be knocking our door soon and we should immediately stop doing what we are doing so far based on an overrated past experience which neither finds any place nor is item of relevance in today's and -especially- tomorrow's environment.

Bypass dilatoriness and outdated rules, remove friction and focus on the total value of the ecosystem.

I really hope this book to stimulate some discussions -even a single one- which will assist to amplify, redirect, and focus the debate on sustainable agriculture among the experts of the segment but also for others genuinely interested in these issues.

The takeaway from the book then is not what to think in any challenge but rather how to think.

Panos (Panayiotis) Chamakiotis

Barcelona, July 2022

PILLAR 1

THE MODERN
AGROFOOD
BUSINESS,
COUNTRIES
& PRACTICES



Leaders & Followers





This is my business "LE.A.F". All about the top-20 lessons I've learned in my career so far and hopefully will become a useful road map for those who would like to think about it.

1. LEADERSHIP IS A PSYCHOLOGY 'INSTITUTE'

Leadership demands information about what is really going in the organization. Managers who never leave the office and who rely on formal communication channels may receive only the information that places by subor-

dinates in a favorable light. The gap between the true leader and the administrator who is leading mostly by micromanagement, without leaving space to people with talent to flourish and deliver unexpected high results, is big and difficult to be bridged without huge personal effort and self-knowledge.

Often you take important decisions based on instinct, passion and experience without having hard facts on your hands but based on the information at that precise time. No way to pass by if you like to be considered as a true leader. It's your own decision, think and decide for your own path forward and how you want to lead your teams.

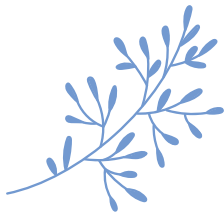
2. GOOD LEADERSHIP IS CONTAGIOUS

Be a fun of a sense and response leadership rather than command and control. Only then you can reveal untapped talents and achieve exceptional performances. Growth demands a scalped and steady hand in order to prevail. Without the right driver in any position you cannot make eye contact with anyone.

No way to make people with talent to follow you if you just track them and don't giving them space to perform. Contrarian with common understanding and perception there is plenty of room at the top for anyone is willing to try but no one is sitting there, all moving and are willing to work out of boundaries and aim beyond and above they think they could make.

3. MAKE THE REALLY TOUGH DECISIONS

You have to take or give the poison pill. People have to fish otherwise you have to cut the bait. Being a trouble-shooter adds to your magnetism. Always find a positive slant in every question you ask and display a positive outlook. Then, you will find that people, although bad news, will gravitate towards you and in other cases they go out of their way to help you succeed.



4. DREAM JOB? NEXT EXIT!

Sun is not brighter on the other side. Embrace good practices in your current job and use it at your next assignment. 'Steal' with proud and glory if you can copy and implement good success stories and tools from others.

5. I NEED NEW HATERS. THE OLD ONES BECAME MY FANS

Managing involves coping by embracing dynamism and change. This cannot be welcomed by all so keep experimenting without based on decisions driven by your need to be liked by others.

If you are a good manager and you give the signal by example you will see during the years that the false inhibitors will be gone, the gloves are off.

6. A TEAM IS A GROUP OF PEOPLE WHO TRUST EACH OTHER

Find or create dissenting views. Team work is not a group of individuals happened to gather at the same office. Synergistic cooperation between members that count on each other differs from defensive behaviors and could multiply the results.

7. IT'S ALWAYS SEEMS IMPOSSIBLE UNTIL IT'S DONE

Great ideas need landing gear as well as wings. Be a cheer-leader for ambitious deal making because progress beats the crap out of fear. Every-Single-Time! Avoid anchoring bias and tunnel visions.

8. CONSUMERS ARE STATISTICS — CUSTOMERS ARE PEOPLE

Do not suffer nonperformance. Customers are first priority but should not come always first without reason. Employees should come first and they should always have the customer in the core of their business not just a five minutes break to their daily operations. In business nothing is happen until a sale is made.

9. THE REALITY IS IN MARKETS NOT IN CONFERENCE CALLS

Stay connected with customers while growing in size. Becoming fatter is different from becoming bigger. In the meetings we can really see a 'star trek' future but the bad side would be 'mad max' if you don't listen the messages what the markets convey.

10. ATTITUDE MAKES THE DIFFERENCE

Don't get inhibited or slow down by negative people and defensive behaviors. When resistance is 'Teflon coated' remove yourself from toxic persons and focus on the important things. Explore and exceed your limits, go against odds when you have a solid plan and mindful idea.

11. ASK QUESTIONS, BE PASSIONATELY CURIOUS, BE PERSISTENCE

Curiosity is one of the humanity's most healthy instincts. Believe in values not in stereotypes and dogmas.

The problematic individuals can be easily spotted as they always talk about the past. Focus in present and future not in status quo. Be curious, question everything, listen, ask questions and encourage debate.

12. MAKE COOPERATION AND CUSTOMERS NOT SALES

Customers in the modern era are making business don't just buy products and services but actually they 'hire' you for a job. Transfer knowledge and information to your customers for making them to always be one step ahead of competition.

13. CULTURE EATS STRATEGY FOR BREAKFAST (LUNCH, DINNER...)

This famous phrase of Peter Drucker really counts for any successful organization and especially for **transitional management** during unstable periods. Bad culture in an organization can easily destroy the most creative strategy.

Culture Eats Strategy For Lunch - Famous Peter Drucker Quotes - TechStory

Peter Drucker, also known as the father of modern management theory, was an Austrian-born American management...techstory.in

14. NO MATTER HOW GOOD YOU ARE BUT HOW GOOD YOU WANT TO BE

Innovation, many times, may lay on your desk, find your strategic sweet spot of competitiveness and dare to dream big. Don't neglect any opportunity to improve yourself, every single day.

15. PURPOSE AND COMMITMENT MATTERS

Stay tuned. If you have problems with your strategy then map it, forging opportunities from uncertainties without padding your projections.

16. BUILD A STRONG MANAGEMENT TEAM

A recipe for rabbit stew begins: First catch a rabbit. Similarly the first step in operating a successful force is to select the right people. Do not be afraid to push the button to the ground floor again when the elevator –with you in-

side- has reached the top. Avoid the 'too many buddies' atmosphere as well.

Establish an entrepreneurship environment and leave your team to take important decisions.

You demand to be updated regularly about the progress of each phase, remove inhibitors and generate resources to empower your teams. They will 'return the favor to you' with exceptional results with moderate exposure because entrepreneurial approach is risk adverse not risk taking process unlike many people believe. Be clever to hire smarter persons than you; they will help you to improve the weaknesses you have. Give them direction, remove the bottlenecks from them, demand regular follow up and let them do their job.

17. REWARD THE EXCEPTIONAL PERFORMANCES AND GIVE SPACE TO PEOPLE WITH PASSION AND TALENT

There are two things people want more than sex and money: **recognition and praise**. Reward with generosity the exceptional performance.

The power of praise & recognition

*When it comes to motivating team members,
offering praise and recognition for a job well done
can be extremely...*

www.trainingjournal.com

The full potential and capability of really talented people never be accomplished with the strict authoritarian & micro management style which implies insecurity and false sense of control. People usually don't leave bad companies but bad managers instead.

18. PUT SUSTAINABILITY AT THE HEART OF YOUR JOB

It pays off! Don't be distracted by small, temporary wins which are based on low value bars or external circumstances. Focus how to detect, capture and maintain the true added value by improving your performance and the performance of others.

19. BUSINESS DIFFERS BUSYNESS

Filling hours in the office is not the same as working. Be productive and prioritize your main obligations each day, spare the others for a second time's duty.

20. AIM = I AM

You have the true power to accomplish great things, go for much bigger than you think you can do and you will discover that you can exceed your limits, you thought that you initially had, by setting new, higher edges to grasp.

«ME» LTD
HAS HAPPINESS
AT THE BOTTOM
OF ITS P+L

Exploiters of the land



*Boy, those French!
They have a different word
for everything.*

American actor Steve Martin said...



For me, to explore deeper some French sectors and understand relevant behaviours is a fascinating 'glossary' and the navigation of French agriculture is another essay that can be easily conceived as another chapter in the ethno-adventurous book I wrote few years ago about the challenges of modern agri-food sector in several countries.

In the traditional lives of the French people, the land all around them is alive with spirit, energy and style generated by the forces of wind and water between people and the local traditions, as the habitants generate an agricul-

tural livelihood beneath the watchful eye of the energy of land. While I remain grateful for that aspect of knowledge that makes the writing easy, I still have not found the antidote for what makes it so difficult, except to be aware of the dangers of shallow observation and to try very diligently to avoid easy conclusions for the reason why French people believe that are different from other European citizens; you can spot similar attitudes from all players of agricultural segments in other countries as well.

Even though I know how pervasive this believe was, reaching nigh into almost every nook in this big country, somehow it still surprises me at times to learn of the respect to the combination of any good tradition which still survives in the depths of French culture, even if close to get erased now in the new progress.

But... agricultural lands are not different from other places, the food is equally fantastic with this in many other countries (although they believe that their food is second to none) and the unfamiliar customs are charming like in other regions. Though there remains something exhilarating about discovering these delightful differences first hand, there is nothing new in the discovery compared to

the habits of other countries in terms of agriculture and production of food.

France literally doesn't just have culture; the word "culture" actually comes from France and when you stay in the country, whether for couple of days or years, familiarizing yourself with its cultures and traditions will deepen your experience for life.

People tend to have a higher standard of living in France compared to their European neighbours, according to France's national statistics agency, INSEE. Since the 2008 financial crisis, France's poverty rate has been on the rise but the country is well known for having a generous welfare system and you find the proof everywhere.

The French take immense great pride in their nation and government and are typically offended by any negative comments about their country.

"From around the 16th century, in Europe, culture became a term for the cultivation of the mind, the intellect, knowledge, learning, creative faculties and acceptable ways of behaving," said De Rossi. The French embrace style and

sophistication and take pride in the fact that even their public spaces strike a regal tone. Why? Because they believe in *égalité*, which means equality, and is part of the country's motto:

Liberté, Egalité, Fraternité.

Many say they place a higher importance on equality than liberty and fraternity, the other two words in the motto...

'Style' also exists in the Agricultural sector which is a meaningful provider in the French economy with more than 10% contribution of total exports and the Agri-food sector accounted both for 3% of GDP and employment rates.

The vast majority (78%) of changes in land occupation posts observed between 2006 and 2012 concerned agricultural land, which most often gave way to artificialised land. Of these changes, 47% affected arable land, while permanent crops represented only 3%.

The loss of agricultural land can be attributed to a variety of factors: population growth, attractiveness to tourists, increased urbanisation and the abandonment of agricultural land.

THE COMMON AGRICULTURAL POLICY (CAP) IMPLEMENTED ON AN EU-WIDE SCALE SINCE 1962 IS FOUNDED UPON TWO PILLARS. THE FIRST CONCERNS SUPPORT FOR PRODUCTION AND THE ORGANISATION OF THE MARKET, WHILE THE SECOND PERTAINS TO RURAL DEVELOPMENT. WITH REGARD TO THE FINAL PILLAR OF THE FSI—SUSTAINABLE AGRICULTURE/CONNECTED AGRICULTURE – FROM FARM TO RETAIL, IS PROMOTED, AS THE WAY TO WEAN FRENCH AGRICULTURE OFF ITS ADDICTION TO CHEMICALS, WATER AND FOSSIL FUELS.

Agricultural sector is probably one of the most inefficient parts of their economic value chain today and there is an elephant in the room which is climate change and matters a lot for the believes of country's responsible. They are well aware of the fact that agriculture, is responsible for one-third of global warming emissions and global warming is expected to modify the water cycles of the earth, wreaking havoc for farmers and driving up food prices. Therefore, needs to be addressed as a matter of priority for French Agro policy. Analyses to qualify for organic agriculture certification, committed farmers comply with rigorous specifications as defined by European and national regulations are in place in France. The fundamental principles of organic agriculture are based on not using chemically synthesised products and genetically modified organisms, but on recycling organic materials, crop rotation, biological control and respect for animal welfare. These attitudes cultivate different methods of adding value allow the development of a variety of products, and often an agriculture that is more respectful of the environment.

They also help sustain economic activity in disadvantaged rural areas by promoting expertise and areas of production. In 2010 in metropolitan France, 65,724 farms

(according to statistics) had at least one product that was recognised under a quality sign (including CCP, excluding AB and excluding viticultural production), i.e. 13.4% of the total number of farms. The CCPs and LRs primarily applied to beef products, while the designations of origin essentially applied to dairy and plant products, as well as wines. The Aquitaine region contained the highest number of farms with at least one quality sign, with 8 271 farms for a rate of 20%. In Franche-Comté, one in three farms produces at least one product under a quality sign.

**Where each French farmer fed
15 people in 1979, each farm now
produces enough food to feed 60.**

***“We feed people but farming
doesn’t feed us,”***

**said Philippe Grégoire,
a dairy farmer from Maine-et-Loire**

Due to the adverse impacts on biodiversity like enlargement of field sizes, standardisation of farming practices and of production methods etc. the diversity of farms has been reduced. The sector is a subject to taxation measures and particularly have been taken wide environmental measures and agreements for the sector e.g. declining trend of pesticides, nutrients surpluses etc. but water contamination still appears to be widespread while soil erosion and air pollution are still on the table making this an increasing concern for the society. On the other hand county has successful results in reducing energy use and greenhouse gas emissions while the renewable energy production is increasing

Analysis of the value of agricultural production, recorded in the Agricultural Economic Accounts, includes those of plant production, animal production and agricultural services. It reflects both product volume and the cost of agricultural production. This value has been increasing continuously since 1973 at an average rate of around 5% per year, with a period of relative stagnation between 1996 and 2010. This change is characterised by more services and lower animal production to respond to two priority challenges: • the "Biodiversity" challenge within Natura

2000 sites, representing 51% of contracted areas; and • the “Water” challenge in priority basins under the Water Framework Directive (WFD).

France is pressing ahead with its agro-ecology project, which represents an attempt to ensure a more sustainable approach to farming. A key principle underpinning the agro-ecology concept is that improvements in agricultural performance should not come at the expense of environmental and social conditions. The French Ministry of Agriculture, which is leading the project, expects the majority of French farmers to have signed up to the concept by 2025. As the ministry emphasises, there is no single prescription that will apply in all cases; instead, farms adopting agro-ecology will need to tailor it to their specific context. Nonetheless, agro-ecology encompasses a number of common elements—such as promoting soil fertility through crop rotations and developing synergies between livestock farming and crops (thereby cutting reliance on synthetic chemical fertilisers).

France also scores relatively highly in terms of nutritional challenges, where it is in fourth place in the FSI globally. Nevertheless, it has slipped down the rankings compared

with last years; in 2016 it was the world's best performer with respect to nutrition. A comparison with Japan—which now heads the global ranking for nutrition—reveals some significant differences in terms of individual indicators and determinants. These marked differences in the incidence of overweight people between the two countries can be partly explained by differences in diet.

In the recent past it approved legislation making it compulsory for supermarkets and of certain size grocery stores to pass on unsold food to food banks or charities. Restaurants above a certain size are also obliged to recycle left-over food and must issue “doggy bags” to customers if they request them—a radical move in a country where gastronomic traditions are so deeply embedded. The example set by France has subsequently been copied by other countries, meanwhile, in March 2017 the European Parliament approved a motion calling on the European Commission to set binding targets for the reduction of food waste by EU member states by the end of 2020.

According analyses over the course of the past fifteen years, the opinion of the French people towards the farm-

ing sector has proven to be largely positive. On average, 63% of respondents considered farmers to be respectful of the health of French people, and 76% believed that consumers could trust them. Regarding the impact of farming activities on our natural surroundings, opinions were more divided. This deterioration in the view taken of farmers goes hand in hand with the trend observed in the annual barometer carried out by the French Institute of Nuclear Protection and Safety (IRSN) over the 2010-2014 period. 65% of respondents in this survey considered pesticides to be a source of increased risk for the population. Among the environmental hazards listed in this barometer, the use of these products was a top-ranking concern, at the same level as air pollution.

World Health Organisation cites France as a stand-out country in terms of its efforts to combat childhood obesity. As noted, by raising the awareness of young people about the importance of good nutrition, there will be a much greater chance that they will adopt healthy eating habits when they become adults. A key initiative in this respect is Ensemble Prévenons l'Obésité Des Enfants (EPODE, Together Let's Prevent Childhood Obesity). First launched in France in ten pilot communities in 2004, EP-

ODE is now being copied by more than 500 communities worldwide. Recognising the complex nature of the obesity problem, EPODE adopts a multi-faceted, multi-stakeholder approach in which local communities and families are directed and encouraged to promote the adoption of healthy lifestyles in children (notably, improved eating habits and increased physical activity).

So France is a good example for others regarding sustainable farming practices. Of course, there are several explanations for France's agricultural malaise, not all of them exclusive to France. For example, some would say that successive French governments have pursued an hypocritical, approach. They have paid lip-service to "family farms" and "food quality". They have shovelled most of the replacement EU subsidies towards the big cereal farms and the large agri-food industries which make France one of the world's largest mass exporters of food.

The biggest French farm union, the Fédération Nationale des Syndicats d'Exploitant Agricoles (FNSEA), has traditionally been dominated by the big cereals interests of northern France. It has resisted – as have most French

governments – any radical shift in EU acreage-based subsidies away from large farms to small.

Many French farmers have never swallowed the demise of the EU “intervention” system which gave them guaranteed prices for beef and milk, whatever the quality and whatever the level of demand.

They remain fixated on the need for higher farm-gate prices. They have done less than farmers in other countries to bring down their costs in my opinion. Pascal Viné of Coop de France says that four fifths of French farmers have little idea of what their input costs are. They even can vary significantly between two farms of the same size.

Many French farmers, he says, still regard themselves as “exploiters of the land”, who have a mystical right to exist. They have not grasped that they need to become “enterprises” with the same concerns for quality and customers as other businesses.

Most big cereals farms are still doing fine. Farms which have controlled their costs and concentrated on quality produce are doing well. Dairy farmers have been given some relief by a new, fairer deal from the supermarkets.

But a great swathe of French farmers, especially older farmers, are suffering and they look to government and Brussels for support. The European Commission announced last year that, post-Brexit, it needed to cut the CAP budget by 5 per cent from 2021. France has vowed to reverse this policy. President Macron promised that he would fight for a "new CAP". Many farmers took this as meaning that he would push for a return to the old, guaranteed price system. If so, they are doomed to disappointment.

The old butter mountain CAP will never return, nor should it. In its post-2021 proposals, Brussels wants to shift remaining farm subsidies away from the big battalions towards direct aid for smaller, specialised farms which produce quality food and respect the environment. Such changes might be good news for French farming, if the government and the biggest farming union would only abandon their allegiance to the mass production of pesticide-assisted cereals.

French farm aims now to grow new crop of farmers. They bandy about terms like "co-working" but instead of coding and developing algorithms in open space offices they work out in the open trying to tease tomatoes from the soil. Being a farmer, it's a different world that touches on a lot of different areas: biology, management, accounting etc.. while you may standing amongst rows of tomatoes, peppers, eggplants and other vegetables. Farm is also a business incubator, offering aspiring farmers training and coaching as well as some administrative and legal assistance. The aspiring farmers all sign a special type of pact that guides associations in France which help entrepreneurs that define what help they receive and as all have been recognised by the authorities as switching professions, they continue to receive unemployment benefits or payments for low-income workers.

So, everywhere the French agriculture is full of sound victories in terms of products quality also for the high reputation and their sales positions around the world that implies exportation of culture as well.

For instance, many happy moments in our life provide the perfect excuse to make a toast with champagne (I do not like champagne but I am a great fan of the good French wine); this is one of many admirable examples in the way they generate, capture and add value in their products. While the prestigious Champagne houses with their luxury labels remain steadily successful on sales throughout the world, they are not alone in their efforts to promote Champagne values. Instead, a whole raft of smaller producers are producing Champagne that tastes just as good, with skilled expertise at the very heart of their ethos by making consumers sit up and take notes. Same values characterize absolutely the wine farmers as well who are continuing to provide the world's greatest wines produced on estates with perfect conditions and centuries of winegrowing tradition and they have been constantly trying to reinvent themselves defending the raised challenges and producing new wines for a changing world.

But this is only one, two from many examples of the way the country stands. The French embrace style and sophistication to all of their daily tasks and take pride to associate the culture of fashion, cuisine, art, architecture etc. to everything they are doing.

In conclusion, French people in agriculture have realized that we eventually run out of all our natural resources. Today's French agriculture, among others, is also going to be a digital community that lives in the digital world. The new innovation technologies that will be developed by our contemporaries in the nearest future will completely change the life on our planet and provide the next chapter of French agri-food sector as well.



I am lucky to cooperate with a winning team in France. The imagination of this team is continuously flowing, the way they handle the projects shows resilience, experience, knowledge and critical thinking while they are uplifting one each other's morale, for pushing the boundaries and lifting themselves during difficult times. I am always left astounded at the level of dedication and hard work they put in every situation and they recognize what is valued and essential. Their values elevate their sense of loyalty, they are positive, motivated and engaged.

Shaping a modern vision in France Agrosector makes its implementation an integral part of the day-to-day experience. We openly address weaknesses, we have strong commitment from the local team to deliver impactful innovations to our associates, and there is no doubt that sustainability applies which is the most important driving force of any "decent" organization wants to be ethic and successful when doing business locally.

*“Qui court deux lievres a la fois,
n'en prend qu'uu”*

means

*“Who runs after two hares at the
same time, catches none”*

So, making business in France, you ought to concentrate on one task at the time with optimal attention, if you want that task to be well implemented and achieved.

Only with such an attitude you have chances to grow sustainably at much higher rates than the market, by anticipating trends and adapting to the big changes which are shaping today's French agriculture, turf and sport sector and, in general, the Agro Food Chain.

I was overwhelmed with admiration at what I discovered in France and made me to write this essay. Above all, I have learned many important lessons in my trips to the country which helped me to realize and appreciate the different way they claim are doing things in agriculture. For example is very interesting the distinction between supply-side model and equilibrium model which they follow also the "engineer" approach the farmers are taking, which proposes an estimate of implementation costs for the different mitigation levers studied (opportunity costs, operational costs, investments, etc.) and, allows the consideration of actions that even have "negative costs" but which would result in a gain at farm level at the end etc.

I embrace France's distinguished individuality which is an important cultural characteristic that is encapsulated by the French passion for uniqueness and freedom of opinion, both in society and in business.

Remembering what Ernest Hemingway said that 'If you are lucky enough to have lived in Paris as a young man, then wherever you go for the rest of your life, it stays with you, for Paris is a moveable feast" similarly when you learn about the way that French agro-food sector is operating you get attracted and you want to promote and replicate the most of their practices to other countries.

So, ***“qui vivra verra!”***

The perfect blend



*Italy is not just the
country of fashion
and amazing cuisine.*



It is not just the country of heavy industry and tourism, but also one of the most important agricultural areas in the world, featuring an export culture and producing a variety of crops, innovative agricultural products and rural technology.

**20 regions - 20 different “countries”
blend in a nation. This is Italy!**



Different landscapes, cultures and traditions, and also, something that leads to the production of healthy agricultural products and builds strong foundations which gives incentive to farmers and investors, who, thus, feel invited and challenged to invest in rural enterprises and in contemporary technologies.

Italians have a great opportunity to achieve further development by enlarging the "agri-food" **Made in Italy**. Although the number of farms has decreased dramatically over the last decade (-32%) and smaller farms of less than 10 hectares have almost disappeared in favour of larger ones, modern agriculture provides farmers with the same specific business opportunities.

In Italy, according to the last national agricultural census, there are 1,620,000 farms. Due to the country's landscape, Italian agriculture is highly diversified, with intensive, large production taking place in the northern regions and extremely small production in mountainous areas and in the South.

Due to its longitudinal and mostly mountainous landscape and also due to its climate, which varies considerably from the North to the South, ranging from cold snowy winters and hot and humid summers in the North, to mild winters and a very hot, dry climate in the South, a wide variety of crops is a result of the great diversity of the Italian landscape.

Of the total agricultural land,

- 🌿 grains occupy 29%,
- 🌿 industrial crops 3%,
- 🌿 horticulture 2%,
- 🌿 vineyards 5%,
- 🌿 olive trees 9%,
- 🌿 citrus trees 1%
- 🌿 and tree crops 3%.

The northern part of Italy produces mainly corn, rice, sugar beets, soybeans, meat, fruit and dairy products, while in the southern part there are greenhouses, wheat, vineyards and citrus.

Nowadays, only a few young people engage in rural activities. Only 10% of the farm owners is younger than 40 years old, while 73% is over 50 years old. This indicates a weakness in national agriculture, since younger owners are usually those with propensity to invest and make innovations — which are the key points for the competitiveness of the sector.

So, how can young farmers in Italy increase their activities?

The modern farmer has a quite different approach compared with the past. Let us forget the idea of the lonely farmers with the straw hat and the rakes.

Farmers today use the Internet and stay in contact with the world!

It is no longer only the friendly, easy-going 'dogs' who obey without knowledge, but independent 'cats' questioning and researching thoroughly before deciding. Words

such as “precision farming», «GPS» “digital agriculture», “remote farming” etc. are used more and more frequently in recent years. This is proved by research on agriculture conducted in cooperation with international research institutions.

Let us take a look at some figures:

- 95.6% of all farm analyses are conducted via the internet and online databases.
- 61% of farmers use the Internet every day for issues concerning their work (e.g. weather forecast: 35.2%, 18.5%: technical information, 11.2%, market prices, etc.).
- Farmers are very interested in modern technologies (50.8%: custom applications on the use of plant protection products and nutrition products, 43%: drones: 39.3%: crops' monitoring sensors etc.)

Recently, unmanned vessels (drones) have been introduced in agriculture. They can fly very close to the crops (to a height of 20–70 meters) and, thanks to a sophisticated array of sensors (e.g. camcorders, with multispectral sensors, GPS, magnetometers etc..), they can be configured to monitor crops and make much cheaper high resolution scans than satellite images.

The so-called "Precision Agriculture", in the context of which different kinds of tools are used to optimise the yield of crops, is widespread and popular among farmers and is expected to 'take off' in the coming years.

Moreover, Precision Agriculture is for Italians an advanced form of managing agriculture, which makes use of modern technologies such as satellite mapping of the crops, sensors and GPS systems for agricultural machinery, allowing farmers to optimize cost management and minimize the overall cost (by collecting accurate information on crop yield, on soil characteristics such as topography, organic content, moisture levels, chlorophyll levels, nitrogen levels, pH, K, Mg, etc.).

Regarding fertilization, for example, this practice enables farmers to calculate and diversify the percentage of special fertilizers in accordance with the actual needs of the plants as obtained by the GPS and the sampling zone. The immediate effect is reducing the environmental impact (e.g. nitrogen leaching restriction).

ODDITIES & DIVERSIFICATION

Branding

There are of course several oddities and characteristics that distinguish Italy's extroversion in agriculture, give it its dynamic and its stability.

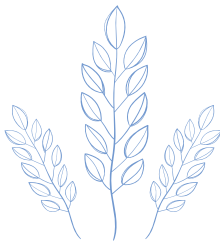
For example, the country is world leader in Coffee branding, while not even an acre of the country is cultivated with coffee trees!!!

Another example is Olive Oil. Italy is among the biggest oil exporters worldwide, while its oil production does not even meet domestic demand. At the same time, the country is an oil importer. It is worth mentioning that, for example, 37.5% of the total Greek production is exported to Italy, where it is processed and standardized and subsequently is exported again as an Italian product.

Extroversion

The industries of food and agricultural products were always, of course, two of Italy's major exporting sectors, with particularly strong presence in European food markets and with a strong presence in the American and Asian markets. They are represented by a large number of export oriented companies.

From olive oil to flour milling products, honey, processed meat and ready meals, Italian companies have taken full advantage of primary production's competitive advantages, in order to reach the global market and remain competitive in it. They have, thus, made food and agricultural products, two of the most dynamic and fast developing manufacturing sectors of Italy.



Packaging

Another sector in which Italian companies have achieved to bring innovation and distinguish themselves is that of packaging. During the last decade, many food companies have gained a large percentage of foreign markets, by combining traditional raw materials with innovative marketing and, very importantly, with innovative packaging.

Distribution Networks of Agricultural Supplies

The diversity encountered in different parts of the country is also reflected in its distribution networks. From the scattered southern sales of points with the 'one step' distribution farmer approach, with limited economic potential and rapid work development, with a passion for introducing new products and technologies, always emphasizing on interpersonal relationships, to the «CONSORZIO AGRARIO» of the North, with its numerous retail sales of points, its complex decision making process and its equally complex business structures, its long-term financial problems and

its reluctance in promoting new products and welcoming change. From the large businesses of the North, with their great bargaining power and influence to the farmers, to the smaller, multi-split, sales points of the South, who work in close cooperation and build relations of mutual assistance with their farmer clients, the contrast in work style and culture is more than evident.

It feels really like encountering "different countries" and cultures when you familiarize yourself with different areas of the agricultural food distribution chain and cooperate with their people.

After the second world war, the emphasis was placed in Italy on the creation of an European agricultural industry has caused damage to Holy's rich agricultural heritage.

EU was supported with a lot of funds the modernisation of production methods and the industrialisation of the sector, but more and more farmers in Italy have been turning in recent years to organic, "traditional" agriculture. The combination of modern and traditional methods of agriculture, give economic opportunities to farmers, they contribute to biodiversity and meet the new demands of consumers.

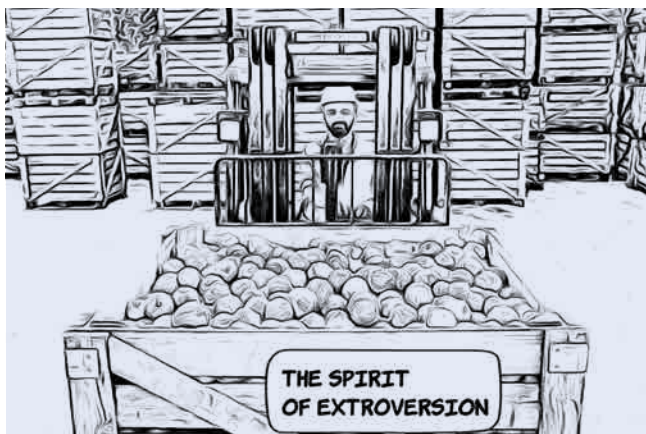
WHO KNOWS?

TO EMBRACE AND PROMOTE DIFFERENT
WORK STYLES IN THE SAME BUSINESS
SECTOR COULD BE A KEY COMPONENT OF
SUSTAINABLE SUCCESS AND EXPLORATION
OF OPPORTUNITIES...

The Global Distribution Channels



Spain — like all the other countries of the European South — is staggering under the burden of the economic crisis.



A preeminent solution for the country, the motivation for this article, is export activity. The export performance of the economy has been impressive, in particular over the last ten years, with continuous growth in all the sectors of the Spanish economy with a strong export orientation and correspondingly with the command of ever greater market shares, principally in the countries of northern Europe, North Africa and Latin America.

In the middle of the economic crisis and in the aftermath of the infamous "property bubble" of a few years ago, good news from the front of the Spanish economy is to be found — and not only — in these companies which are exports oriented. In the last few years, Spanish businesses can boast of one of the highest rates of export growth in the Eurozone, and as a country Spain (the fourth largest economy in Europe) has frequently demonstrated a dynamism greater than that of other European countries.

Exporting companies not only withstand the competition but are recording considerable increases in exports on a European level. Spain is showing itself to be a force to be reckoned with. Even small and medium enterprises are slowly but surely gaining those abilities which will allow them to increase their exports, faithfully following the model that has given them an advantage in the economic crisis and in the stagnating — at best — domestic market, given that domestic demand in Spain has dropped considerably.

A further significant fact about the country is that there are many companies whose entire production is for export and whose central aim is to strengthen innovation.

Most company executive directors stress that if they don't discover something new in the next few years, they will have major problems. That message permeates the entire company structure and characterises the behaviour and performance of their organisations; it creates in other words a corporate culture.

Exports in many sectors, including vehicles, agricultural products, clothing, etc., are steadily growing in volume, inducing, naturally, an increase in production and consumption.

This impressive economic extroversion is not of course enough to end the internal crisis, with its serious funding problems, especially for small and medium enterprises, at a time when most new job creation is happening in

markets abroad, not helping to reduce the millions of Spanish unemployed. Although it is worth noting that lately there has been a drop in unemployment, principally deriving from the service sector. There has been a notable drop in the manufacturing sector as well as the agricultural economy, a sector hit by agricultural restructuring, intense demographic pressures and an aversion for agricultural work.

The agricultural sector had to learn to survive in difficult conditions (which exist and will continue to exist) and in the end move ahead with improvements, in both the economic and social cohesion of the Spanish farming communities.

Large parts of the rural population initially felt threatened by the new innovative and technological farming methods. The immigrant influx from the Balkans, Africa and Asia, however, provided the hands necessary for the labour-intensive sectors of the economy, including the restructured agricultural regions and the fast developing specialist seasonal farming. In many agricultural areas of Spain today, they have already started to form a "new agricultural class", which is attracting considerable interest in relation to their conditions and manner of living and also in relation to their demands for legalisation and better wages.

The overall extroversion of the economy has distinguished Spain from other countries of the Mediterranean basin, such as Greece, and if nothing else its exporting prowess provides the Spanish people with some "comfort" and reason for pride every time a new, large project is secured from abroad.

This trend seems to be stable and the experts are of the opinion that these successes are not only due to the pragmatism of the financial policy followed by Spanish governments, but mainly to the dynamism of the large

companies, especially those that have focussed on Latin America and North Africa.

Exports of agricultural supplies and final products is a sector in which Spanish companies have managed to innovate and differentiate themselves, from the point of view of both the final product and the packaging. Over recent years, there are many examples of companies in the food sector that have carved out significant market shares abroad, combining the use of traditional raw materials in production with imaginative marketing activities, excellent information networks, the development of long-term relations of trust and innovative packaging.

This arsenal together with the heightened disposition for self-sufficiency and greater food security (one of the principal societal challenges of the "Europe 2020" strategy has meant that the Spanish are in a position to create even greater added value and higher profit margins, based on providing products promising better health, physical wellbeing and pleasure, factors central in determining the consumer preferences of the developed economies.

MOREOVER, FOR A NUMBER OF YEARS NOW, SPAIN HAS VERY CORRECTLY RECOGNIZED THE DYNAMISM ARISING FROM THE DEVELOPMENT OF INNOVATION, RESEARCH AND DEVELOPMENT CLUSTERS IN SPECIALIZED SECTORS OF THE FOOD INDUSTRY, COMBINING EUROPEAN FUNDING AND THE WORK OF RESEARCH AND ACADEMIC INSTITUTES WITH THE INTEREST OF LARGE COMPANIES IN THE IMPLEMENTATION OF NEW TECHNOLOGIES.

With this infrastructure, a wealth of opportunities arise – and will continue to arise – for the creation of added value in many categories of agricultural products, particularly given that global interest in safe and healthy foods continues to expand.

EXPORTS OF AGRICULTURAL PRODUCTS

A key part in this trend then is played by Spanish agricultural product exports, where the virtues of organisation, extroversion, networking and vertical integration are the principal characteristics distinguishing Spain from other countries and pushing it high in the global ranking in this sector.

In contrast, as is well known, the larger part of Greek production in olive oil is still exported in bulk, mainly to Italy and Spain.

One might also note that Spain joined the European Community in 1986, whereas Greece has been a member since 1981.

Since joining, the Spanish have consistently followed a systematic, non-negotiable policy aiming to establish their olive oil as the dominant product worldwide and they have succeeded over the years in building up a very strong position. Instead of trying to maximise subsidies, as happened in Greece, they all worked on the basis of the logic of the competitive product and of course were vindicated and continue to reap the benefits, given that they are the first to receive information about opportunities and conclude agreements that will bring about further development.

I work in an innovative company working in the field of inputs, of products and services in the agri-food chain. An internationally recognized leader in the field of specialty fertilizers for an agriculture that will give surplus value to its products and with users who respect the environment.

So what we do to ensure that everything we offer it is in step with the country's exporting rhythm, aligned with the spirit of extroversion, and the philosophy which leads to constant growth?

⌘→ We developed a technical approach to the final user (farmer) with specific actions, the implementation of concepts for monitoring large areas, and increased resources at the same time as our competition was decreasing budgets and consolidation was the mandate of the day.

⌘→ Despite the negative growth of the domestic market in agricultural supplies, we sought and achieved larger market shares through pull strategies, new products and the development of CRM (Customer Relationship Management) methods based on mutual understanding, offering know-how and commitment to the attempt (not just to the result).

☞→ We changed old business practices in the countries under our responsibility (because Spain acts as the hub for the Iberian Peninsula as well as North and West Africa) with new models of operation demanding a greater focus on sustainable development in an extremely competitive environment

☞→ We took swift decisions which entailed – and entail – risks to growth in other countries, working on the basis that "better a wrong decision at the right time than the right decision at the wrong time" (implying that in the end decisions may otherwise not be taken at all) and was vindicated by the response of its collaborators.

☞→ We approached foreign markets, not wielding prices and aggressive commercial policies, but basing its position on the knowledge of our staff and the special needs of the countries, promoting the difference in the value of its services in relation to the product prices and also providing the correct information on successful examples and techniques from more developed countries, principally Spain.

➤ We participated systematically in sectoral exhibitions, focusing at the same time on transferring know how to fields and "minds".

➤ We aimed to influence the food chain and not just sell through traditional sales networks but approaching Omni-channels as well.

This became our standard practice and a systematic approach which will continue to setting higher standards and can be seen as the password for the next ten years.



ABOVE ALL:

I HAVE HAD THE GOOD FORTUNE
TO COUNT ON A CREATIVE TEAM OF PEOPLE,
WITH OPEN MINDS AND THE ENTHUSIASM,
AMBITIONS AND POTENTIAL TO CREATE,
THROUGH INITIATIVES RATHER THAN
SIMPLY FOLLOWING, NOT COMPLAINING
BUT SEEING SOLUTIONS WHERE OTHERS
SEE PROBLEMS, AIMING TO PRODUCE
SURPLUS VALUE FOR THOSE
THEY WORK WITH.

The only thing which “copied with pride” was the trend that has developed in the country and which constitutes a fundamental characteristic:

**Create business not just in the country
but outside it, otherwise you will be
left “outside” the business!**

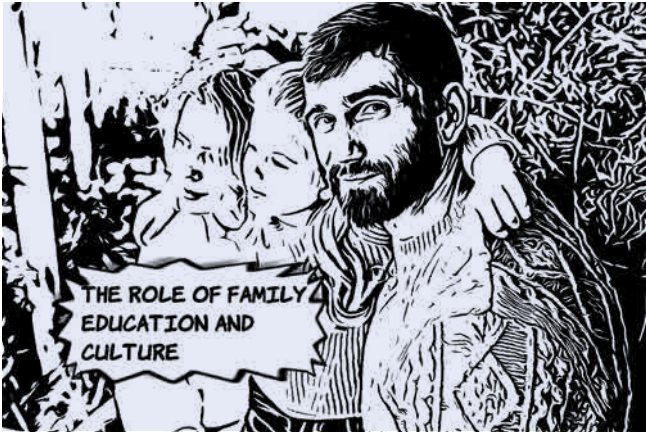
This strategy was a big success, creating in a time of economic crisis the largest corporate organization within the Group. I believe that this strategy will constitute the business model with which to face all the difficult obstacles which we encounter in our sector and which require agility and solutions beyond and outside previous experience and business stereotypes.



What is the biggest “south-east European” land?



Turkey is geostrategically the bridge between East and West.



Established in 1923, as a secular and modernizing republic with an almost entirely Muslim population, its ethnic, historical, cultural, religious and linguistic links with the people of Central Asia, Caucasus and Balkans give it a special geopolitical significance. Characterized by a diverse culture, a result of influence were the Turks from pre-existing populations migrating from Asia to the West. The Ottoman culture over the centuries, taking elements from the ancient Greek, Roman, Byzantine and Islamic influence, gave us the "mosaic" of the current Turkish culture.

My grandmother and my grandfather came from Turkey to Greece. So, I'm positively biased in terms of Turkish people and places, honored & privileged I have the opportunity to write about the characteristics of Turkish agriculture and of respective distribution channels in my point of view.

The country is making great efforts to keep pace with the modern Western States without corrupt religious and historical tradition. Its geographical position between Europe and Asia favors the interaction of ideas, culture and art, with excellent examples in music, literature and architecture.

Istanbul is the largest city of Turkey, while at the same time is a major economic, cultural and industrial centre. The famous bazaars, or large markets of Turkey, with an intense scent of spices, are places where you have to be, at least I want to repeatedly be. There are places where the various elements of the cultures but witness and the nomadic life of the Turkic tribes before forming the current -single culture. The famous Turkish baths or hammams are places of meeting but also architectural beauty. The Turkish coffee and the tea and the way they

served, though comes from East Africa, established in Turkey and is an important part of everyday life and culture of the Turks.

So many things for someone to say about...

The country is rapidly modernized all these years and from the 2012 apply new settings for investment incentives as its core strategy. Apart from the incentives that were applied in the past, introduced the following two innovations which are aimed, both, the substitution of imports by domestic production, so as to reduce the trade deficit of the country:

-1-

Given incentives to boost domestic production of intermediate and final goods in areas where there is high dependence on imports,

-2-

Given incentives to boost investment in high value-added manufacturing products and hi-tech products.

In accordance with the new framework of investment incentives, introduced the concept of 'strategic' investments, whereas such defined investments that reduce dependence on imports, boosting production of goods with a high added value and high technology.

**The incentives are given,
depending on the type, height,
area and in the area of investment,
include reduction in corporate
tax rates and income tax,
reduction in employers social
security contributions, concessions
of land, excluding VAT,
except for customs charges,
VAT refund.**

AGRICULTURE

Agriculture is still the occupation of the majority of Turkish people, despite the share of industry and services are raising constantly. Turkey is one of the few self-sufficient countries in the world in terms of food. Turkey's fertile soil, adequate climate, and abundant rainfall permit growing almost any kinds of crops. The farming is conducted in all of the regions in Turkey, but it's less practiced in the mountainous eastern regions where the main activity is based on animal husbandry which has a share of one-fourth of the gross value of the total agricultural production.

The rapid industrialization of Turkey after 1930's and government policies caused agriculture's share to decline in overall income. The share of the agricultural sector in the GNP was almost 50% in 1950, 25% in 1980, 15.3% in 1990, 11% in 2005, 7.4% in 2014. This caused the fall of economic standards of the farmers and contributed to emigration from rural to urban areas. But in 1990's, the State encouraged the farmers to adopt modern techniques with the mechanization and has provided infrastructural conveniences for irrigation and cultivation contributing

to the development of the agricultural sector. The most important of these projects is the **Southeast Anatolia Project (GAP)**. Although the sector has grown over time, the growth has been only about 1 percent faster than the country's population, and much slower than that of the industrial and services sectors. Farmers have been slow to adopt modern techniques, and much of the potential land and water resources are inefficiently managed.

The agricultural sector is currently undergoing a restructuring process in order to achieve harmonization with the EU regulations. Turkish farmers enrolled in the Farmer Registry System receive Direct Income Supports from the government, a premium system is practiced, and they receive chemical fertilizer support and diesel fuel support, as well as training for the latest agricultural techniques. The Agricultural Bank of Turkey (Ziraat Bankasi) provides most loans to farmers and cooperatives and much of the World Bank's lending for agricultural projects in Turkey is channeled through this bank

TURKEY IS THE WORLD'S 7TH LARGEST AGRICULTURAL PRODUCER OVERALL WITH MANY CROPS PRODUCED IN TURKEY LIKE WHEAT, BARLEY, OATS, RYE, MAIZE, MILLET, AND RICE WHICH ARE PRODUCED IN MOST PARTS OF THE COUNTRY, WITH A HEAVIER CONCENTRATION IN THE CENTRAL REGIONS, BUT ALSO IS THE WORLD LEADER IN THE PRODUCTION OF MANY CROPS SUCH AS DRIED FIGS, HAZELNUTS, SULTANAS/ RAISINS, AND DRIED APRICOTS.

Turkey has become the largest producer and exporter of agricultural products in the Near East and North African regions. In fact, according to The Economist's world rankings, Turkey is one of the top 10 producers of fruit, wheat, and cotton in the world. More impressively, it ranks among the top 5 producers of vegetables, tea, and raw wool. As a result of this massive production base, Turkey enjoys a comparative advantage in many agricultural products, and a positive trade balance in agriculture that contributes significant relief to an overall trade deficit. The country's main export markets are the EU and the United States, to which Turkey exports dried fruit and nuts, cotton, and tobacco. Another major export market is the Middle East, which buys fresh fruit, vegetables, and meats from Turkey. By 1999, the value of agricultural exports had risen to US\$2.4 billion and accounted for 9 percent of Turkey's export earnings (down from 60 percent in 1980). However, these figures could be misleading so far as almost 50 percent of the manufactured exports also originate in the agricultural sector (primarily textiles and clothing). Therefore, the agricultural sector's direct and indirect total contribution would still account for 50 percent of total exports.

The major industrial crops produced in Turkey are cotton, tobacco, and sugar beets. Cotton is crucial to the wider economy since it provides the fiber for textiles, the leading category of Turkish exports. Cotton is primarily grown on the coastal plains of the Mediterranean and Aegean seas, in the south and southwest. Only 10 percent of cotton is exported in raw form, while the rest feeds the domestic textile industry. The Southeastern Anatolian Project is Turkey's largest development project. It seeks improvements in energy production, tourism, mining, gasoline, education, health, communications, industry and transport, and in active farming by means of extensive irrigation systems.

When the project will 100% completed, it is estimated that Turkey's cotton production will expand to twice the level of production in the year 2000.

Turkey is prominent, too, in the world trade of edible nuts and dried fruits. In this category of agricultural products, hazelnuts, pistachios, sultanas, dried apricots, and dried figs are important exports. Records indicate that hazelnuts have been grown along the Black Sea coast since 300 B.C. and Turkey is a major producer, competing with Spain, Italy, and the United States in the international markets.

Another characteristic of Turkish agriculture is the small farm size. There are just over 4 million farm households in Turkey. 67% of these farms each owns between 0.1–5 hectares of land, (22% of total agricultural land), while only 33% of households own more than 5 hectares — comprising 78% of available agricultural land. Farm output therefore remains low in comparison to the country's enormous potential and farmers' average income is also low. Small farm size and lack of economies of scale, coupled with increases in input prices, dependency on rainfed agriculture, and lack of efficient market mechanisms are leading to a rapid rural exodus.

AGRICULTURAL REFORMS & TRENDS

Turkey's basic agricultural resources are vast and offer considerable potential for expansion. However, to maximize this potential and increase efficiency, the agricultural sector needs government involvement in structural reforms and development projects. One of the several aims of the Southeastern Anatolian Project is to strengthen and expand the agricultural resource base for one of the most underdeveloped parts of the country. Indeed, GAP is possibly one of the most crucial projects for Turkey, since the large economic disparity between urban and rural areas has created social tension, and contributed to damaging levels of migration from the countryside to the cities, primarily in the southeast. This situation poses a serious threat to future agricultural development and to the general economic health of Turkey. When evaluated GAP in respect of energy generation being its primary target, its considerable contributions are apparent. Total value of the energy generated by GAP exceeded 17 billion dollars; 9 hydro-electric power plants were completed as of the end of 2008; 5% of the energy need is started to be used from these sources.

ALTHOUGH IMPORTANT PROGRESSES WERE MADE ALSO IN INVESTMENTS SUCH AS TRANSPORTATION, ORGANIZED INDUSTRIAL ZONE CONSTRUCTION ETC., THE TWO OTHER TARGETS OF THE PROJECT; COMPLETION OF THE IRRIGATION NETWORK AND CONSCIOUS AGRICULTURE/ INDUSTRIALIZATION COULD NOT BE ACHIEVED EFFECTIVELY.

Inflation and the high interest rates have been a major constraint in the development of agricultural sector. The unstable exchange rate increases the degree of price uncertainty faced by farmers, both in the export and domestic markets. Reassuringly, the Government has embarked upon a deep and wide-ranging reform process, which will include and benefit the agriculture sector on a priority basis.

The Government has had a wide range of programmes aimed at supporting agricultural production through the establishment of large-scale irrigation schemes, the provision of cheap credit, the subsidization of inputs, the provision of extension services and the financing of research. The Turkish Government has traditionally intervened in the agricultural sector in order to support producer prices, to subsidize inputs and credit and to reduce the consumer prices of staple food. Although producer price support has been very costly to the government, it has failed to stabilize farm incomes. As a result, procurement support has been substantially reduced in recent years, while the production, importation and marketing of fertilizer, agricultural chemicals and farm machinery, except seed supplies, have all been fully privatized.

Important agricultural policy reforms include the establishment of agricultural producers' unions, adoption of agricultural insurance system, privatization of State Economic Enterprises, development of agricultural commodity exchanges and to strengthen research and development activities. In the long run, the goal is to face the inevitable reduction of a rural population dependant, mainly on farming, from the present 40% to 10% and to promote agro-industry, as well as the adoption of international standards for agricultural commodities in the process of integration with EU in the near and medium term.

The agricultural supports policy seems a field where the reform is apparently required. In time, an unchanged structure and an unchanged cost are noticed; return from Direct Income Supports policy — initiated in 2001 however officiall ceased in 2009 — to the former structure is considered as "a step backwards" by the specialists, for instance by the OECD. That the protectionism is so high to interrupt the relations with the outer world is one of the fundamental reasons increasing the price support.

The question
“Can Turkey do it better?”
should be asked; and it should
be stated that there might be an
unrealized important potential in
this sector.

Even Turkey is a rich country in respect of agricultural lands, the fragmentation of the lands into small pieces of land ownership makes difficult to benefit from the economy of scale in particularly annual arable crops and livestock.

In order to cope with this obstacle hindering the productivity in agriculture, many legal arrangements have been made since the establishment of the Republic of Turkey. As far as can be seen, one of the most effective factors, resulting in fragmentation into small pieces of land, is the Heritage Act. Accordingly, upon enforcement of the draft law being evaluated at the Prime Ministry during the preparation of our report and aiming at preventing

the land division for heritage, it becomes possible that the average size of farms increase. Another development in this respect is the commencement of preparations for a new structuring under the title of "*Agricultural Land Acquisition Office*" affiliated to the Ministry of Agriculture and Rural Affairs. This study aims at gathering the agricultural lands by acquisition, sale and lease of the agricultural lands by the way of tender. However, it is of great importance that these attempts be handled by an integral approach observing the other structural problems (*such as acceleration of the cadaster studies, strengthening the access by the farmer to the credit etc.*).

It is possible to summarize the benefits, types and other advantages of final completion of GAP but as a generic result, the full integration of Turkey would be painful; however, it would cause changes in agriculture, which might be considered as radical. It is possible to compete domestically for the products which we fall far behind EU average productivity. From this perspective, social damage of harmonization with the CAP is ambiguous and the opportunities to arise are missed.

I hereby notice that the trend of financial investment in agriculture visibly increased in the long time; however, it failed to considerably affect the volume of the agricultural production. Secondly, it is apparent that many agricultural financing methods, rapidly multiplied in 2000's, have not been applied in country yet or the institutions applying these methods have not made any investment.

I am of the opinion that initiation and dissemination of Agricultural Investment Funds in Turkey is one of the ideal instruments to attract both domestic and international investment in the agriculture, know-how and information accumulation.



Specialties products booming in line with Innovation and strategic thinking in Turkey

In markets that are "thirsty" for everything new, innovation-based economy is no longer added value only, but constitutes the required path for every modern company.

Leadership and creativity are on priorities of each business search and the core of modern management. New ideas are the basis for all strategic planning and very essence of good manager. The company that will stand out should follow something new, to anticipate market needs and manages to surprise pleasantly demanding.

I am privileged to cooperate in Turkey with professionals who are eager to show originality, reactivity and creativity which is the driving force to overcome their own inaction some times. The inertia and resistance to any change might be a characteristic of many business societies but this behavior "left the building" when you recall the positive attitude and winning approach of the persons I'm working with.

Turkey is a complicated country, that transforms constantly and the society changing rapidly, also with great contrasts between different areas especially among regions on the West Coast with sites located deep inland, on the East side. Studying well the Turks you realize immediately that is a population that is simple and true, structured on solid orientation, with faith in the past and optimism for the future, with ideals and values.

The way of thinking of the Turkish people is close to religion, history and Islam go hand in hand with nationalism (*it is very difficult to made concrete a demarcation between Islamism and nationalism*) since both maintained and espouse similar cultural codes, as ideologies which are listed in a continuation of the Western lifestyle while preserving national and moral values, resulting significantly in shaping people's value system.

Also important is the role of the family and education.

Of the family, because it is the basic structure of the Turkish nation and the primary guarantee for social security and of safeguarding moral values and of education, because this contributes decisively to the development of youth and into 'a better future'.

These two are the basis of our partners' values in country as well.

In Turkey — in contrast to other regions of the Mediterranean basin—we are lucky to follow a distribution model with key accounts — importers and we support our customers with knowledge transfer, with promotion of our products, with a pull strategy in general in order to grow with them in solid and mutually beneficial basis.

Our local partners are businessmen who are loyal to the company, open-minded, interested in continuous evolution, promote innovative solutions that educate farmers (also themselves) as well as trying to claim a better future for their children by working hard to ensure the greatest possible guarantees to this effect.

They are very good negotiators and don't hesitate to take reasonable risks that will bring profitability. They are also entrepreneurs who match with our own, corporate profile and clearly know their business goals, and our own "red lines" in making business.

So, what we did to promote our distribution model? We kept it really simple:

⌘→ Right concept –primarily- and product selection for promotion and careful planning movements.

⌘→ Not piecemeal actions and 'protection' of our distributors from unfavorable decisions.

⌘→ Before the conclusion of any agreement, cooperation with Turkish law and meet the requirements of our customers/partners.

⌘→ Preparing technical arguments for the promotion of the products to demonstrate superiority.

⌘→ Friendly behavior but in moderation with effort for honest business relation and conquest mutual trust.

➤ Secure transactions and issuance of appropriate certificates required for introducing product to avoid problems along with possibly maximum flexibility -compared to other multinationals- for our customers to better be benefited giving us –as collateral- on the negotiation table much higher shares from their business.

➤ Careful study of the behavior of the Turkish businessman, solid and long lasting personal relations with our loyal customers and local thinking of doing business.

➤ Attention to the level of Turkish culture especially that which does not have many experiences abroad.

➤ Continuous-monitoring institutional framework & benchmark.

➤ Dare to ask, dare to put ambitious edges.



I DON'T KNOW HOW MY BUSINESS IN TURKEY WILL BE IN THE FUTURE, I CANNOT BE BASED ON MY 'CRYSTAL BALL' TO ANTICIPATE FUTURE EARNINGS BUT I DEFINITELY KNOW THAT I'M WORKING WITH A HIGH SKILLED TEAM WHICH CAN MAKE THINGS HAPPEN AND I'M CONVINCED FOR OUR PRO-ACTIVENESS TO DESIGN THE RIGHT CONCEPTS AND TO IMPLEMENT THOSE EFFECTIVELY FOR ACHIEVING FUTURE GROWTH AND GRASPING KEY MARKET POSITIONS.

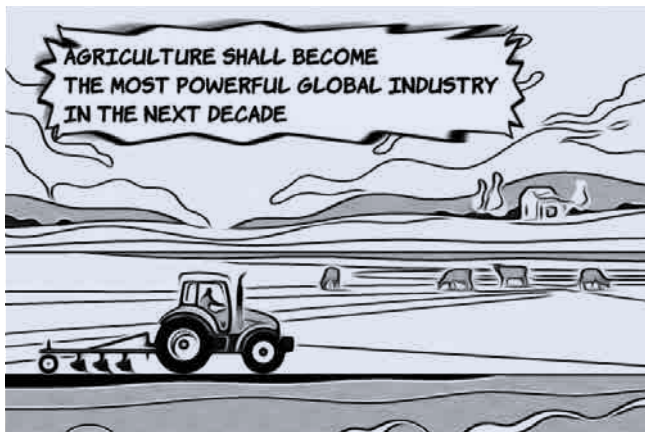
PILLAR 2

INEFFICIENCIES IN SUPPLY CHAIN, TRADE, CLIMATE AND -LATELY- OF PANDEMIC THREATS



Experiencing the Unexpected





“Who knows?”

One day, we might be able to develop a fertilizer with the ability to spread throughout a field and release its nutrients, simply by placing it at one random spot. Cost reduction would be substantial and the benefits immeasurable”.

Q. The revolutionary method launched by Nobel laureate Norman Borlaug on the use of chemical fertilizers led to the significant increase in yields, covering the nutritional needs of the entire planet for about a century. What should we expect today?

I do not want to make any predictions. Life always knows better. Who would have thought that nowadays we would have crops under an absolutely controlled environment, vertically rotating greenhouses, remote sensing agriculture, precision agriculture, GPSs, gadgets for farmers, vertical farming, etc. One day, we might be able to develop a fertilizer with the ability to spread throughout a field and release its nutrients, simply by placing it at one random spot. Cost reduction would be substantial and the benefits immeasurable. Anything is possible.

The powerful global food chain industry will inspire new ideas and nurture new methods. The technological developments are fast, and we must simply follow their flow. I believe in the **“more with less”** rule, and I think that knowledge will be led to this direction. Plant nutrition is not just about the 17 known and necessary for plant growth nutrients. It's about a group of sciences,

such as Soil Science, Plant Physiology, Chemistry etc. -all under what we call **Plant Nutrition Science**.

We now have to deal with issues, such as the increase of the world population, malnutrition, water resources shortage, and degradation of soil fertility.

The solution to all these issues is to simultaneously proceed to variety improvement, radical changes in the farming practices, rational use of water and nutrients, and contractual agriculture through banks or agreements between farmers and investors. These will be the ultimate goals for the next 20 years.

Q. Will the differentiation in technology increase yields or is it enough to integrate new available acreage in the production system?

According to the United Nations, the world population of 6.7 billion today is expected to reach 9.2 billion in 2050. The main priority of the Organization, as depicted in the Millennium Project of 2002, is to increase agricultural production, in order to cover the nutritional needs

of the continuously growing world population. **I am a fan of "and" and not of "or" way of thinking.** I believe that both solutions together will make an impact. Future agriculture will depend on the yields of the existing land and the differentiation of technology, as the backbone of interest and surplus value.

Q. What will be the role of Africa in the new status quo in the field of agriculture?

As I wrote in one of my articles a few months ago, two thirds of the farming land which is targeted by investors today are located in Africa, and there is a serious investment trend in the last decade. There are multinational giants investing in agribusiness in Africa, clearly indicating that the future of agriculture is there. Massive pieces of land are acquired and there are serious investments in vast monocultures, in order to ensure large-scale agribusiness, exerting pressure to small, independent farms. There is also investment on training programs for rural communities on the increase of yields, on securing more efficient labor resources, the utilization of more effective cultivation methods, and the creation of agricultural networks.

The developing African countries have low debt levels, cheap labor resources, but with lower efficiency, attract substantial foreign investments and experience significant development, which all give them great potential, balancing their weaknesses (poverty, corruption, social inequality).

However, Africa is far from being a so-called “paradise for agricultural investments”. In order for the continent to jump on the agricultural growth bandwagon within the next 20 years, investors must forget about this notion of Africa being a paradise, and be prepared to deal with a completely different culture and customs. They must undertake riskier responsibilities and have a completely different implementation timeline, and, above all, expec-

tations for their return on investment compared to the agricultural development models in Asia or Latin America, for instance. They should plan for **at least 10 years ahead for depreciation**, taking into account the increased risks they took.

Q. The entry of large funds in agriculture-related investments signifies something more than what the future nutritional needs dictate?

It is no secret that investment funds have the necessary resources and foresee the surplus values. These groups do not operate autonomously, thus leading to the increase in demand for land. Even governments seek to acquire agricultural areas in other countries, to ensure food and energy supply. Last, but not least, we must not forget about the big companies wishing to expand their business or become vertical, by integrating primary production. Investments in agriculture are attractive to private individuals because:

1. They have good income prospects, since, in the long run, the agricultural products supply-demand imbalance is expected to increase prices.
2. The value of agricultural areas may increase, as a result of its scarcity and high demand for food.
3. Of the possibility for investment portfolio diversification and protection against inflation. Agricultural yield remains unaffected by inflation in developed economies and usually higher.

The funds are interested in securing access to food or other agricultural products, water, and inflows, to ensure returns for this alternative type of investment. However, they also have a responsibility. To respect the economic and social rights of the local populations and to preserve environmental sustainability. Otherwise, they are condemned to failure.

Agriculture, together with energy, are top priorities for global investments. Consequently, nutritional needs and the quest for profit are the two sides of the same coin.

Q. Fertilizers are commodities or maybe “à la carte” products make them a specialty?

More and more people tend to believe that proper plant nutrition will work as a protective shield for the plants in the future.

This shows its current power, which may be further increased in the near future. Is it a coincidence that pesticide companies worldwide are investing in the broader field of nutrition and not vice versa? Of course, the scope and significant contribution of fertilizers count as much as in the other inflows. There are commodities (products without differentiation) and specialty products (with ob-

vious differentiation). In the second case, however, products go hand in hand with the agricultural applications for specialty products, specialties' scientists and farmers that go the extra mile, and specialties' uses and users-connoisseurs.

My mission is to help the leaders to achieve such a conversion and operate as "converters" of commodities into specialties, in order, to back up the farmers to harvest for better and higher yields.

Q. The motto is "less and more expensive fertilizers", adjusted to the needs of the plant, with lower environmental impact. What does that mean for the competition and what should a producer know?

The global trend is to adjust to the needs of the plants, maximize production and improve quality, with respect to the environment and the farmer, providing solutions that might be expensive per packaging unit, but much more affordable per acre or per product unit. The days when the farmer-entrepreneur was focusing on the "package/product unit price" index are long gone. The

focus is now shifted to the “price per acre” index, and on the “price per quality product yield”. The research of sophisticated companies (including ours, of course) is oriented exactly towards this direction, with respect to their future product offers and the differentiation they aim for.

The rule “more with less” is gaining momentum, with regards to perception and seriousness of decisions. All major players in the field of distribution of agricultural supplies know that, and they accordingly adjust, because deep down they feel that if they don't, they will soon have no reason to exist. It's no paradox for someone to live on a break-even point (merely surviving) and for a competitor to stand out by providing better services, develop his knowledge and products, invest and win in the long run. The same rule applies for a producer, and he needs to choose between those two statuses.



Q. There is a decline in direct subventions for farmers and a respective increase of channeling resources to the second pillar, i.e. funding of structural programs. What does this mean for the European and global agriculture?

In simple words, it means that the successful agricultural models will be adapted to the new landscape and old-fashioned models will shrink.

Nowadays, the fast fish usually eats the slow fish. The rule of the bigger fish eating the smaller does not apply.

We know that the interest of the EU in the future will focus on growth and employment, emphasizing on Sustainability. I believe there will be better and more effective environmental rules. The US, for example, has abandoned direct subventions in favor of a model that ensures agricultural production, while global agricultural competitiveness is affected by exchange rates. Thus, knowledge and information shall prevail over resourcefulness and timely action will prevail over inactivity or procrastination, impediment, and obsession for old-fashioned business models. One thing is for sure.

Agriculture and inflows shall become the most powerful global industries in the next decade, and agriculture will finally be recognized as a serious business sector.

Q. The intensity of the competition and the decrease in profit margins for arable products turns the spotlight over new agricultural products (e.g. super foods). Is this something that concerns you, as a group, in terms of sales?

This is correct. The smart thing to do is to foresee the future, and not be stuck in the present. Even though Compo, during the last years, is focusing on creating new, innovative technologies and synergies in developing regions, these major changes in the agricultural map are certainly of great concern to us. I believe that the reduction in the profit margins for extensive crop products is balanced by the effort to find new technologies and substantially increase productiveness.

Q. At the same time, the small profit margins from farming lead to a concentration of powers, a development that puts out of the game countries with unresolved structural deficiencies and small farm sizes, such as Greece.

Not necessarily. Let's not forget that the primary sector in our country contributes about 5.1% of the GDP. So, future investments and forthcoming changes are of particular significance. If we remain viewers, we will be facing serious problems, as a country. And this is why we need to come up with a solution. We shouldn't be focusing on what we are giving, but on what we are gaining; and I don't just mean profits.

Do you believe that we can ever have the broad lands of Africa, Northern Europe, Romania, or Asia, in order to take advantage of the economies of scale? The medium-scale farmers of Germany in many cases are equal to the agricultural supplies stores in Greece, in terms of annual consumption figures. Do you believe that we can compete with the Marketing and Distribution networks of Spain, Italy, and the US, or the professional relations they have built with large grocery stores through all

those years, providing steady volumes of products? Do you think we could ever cut down our production costs to the levels currently existing in South America, Asia, Turkey, Eastern Europe, etc.?

Okay, we can give it a try, if we believe in it. But we also need to transform our policies. In other words, we should stop transferring responsibilities from one link of the same process to another, because a chain is as strong as its weakest link. As hard as we may try, the competition will always be ahead.

**When it comes to
the value chain, I believe in the
“too big-too small” theory.**

So, instead of trying to compete in the category of medium-sized shares in the food chain -which are pressured immensely by inelastic expenditures, investments that did not have the expected results, slow reactions to changes, and strong price competition, since there

is always the risk of market share decrease-, we should dominate on the small shares of the global distribution, taking advantage of a powerful, yet unexploited weapon: the quality of our products.

This is our strong competitive advantage.

We need to rebrand our production, in order to become the ultimate European destination for quality agriculture.

What could this mean for the Greek agriculture? In other countries, the involvement of agricultural supplies stores in the vertical integration of services, by participation in the food cycle, is rare and usually conducted by other entrepreneurs and companies. In Greece, there are many extrovert scientists involved in agricultural inflows and active in this vertical integration, e.g. the sale of products even directly to the final consumer or through packaging or through the creation of their own brands. Do you know what a great advantage it is, for the

competent stakeholders to be involved? We should be focusing on our advantages and the things we actually have, rather than overestimate our strengths.

Our actions should be focusing on here and now, on everywhere and always, but a successful initiative, apart from its medium/long-term vision, should include planning for –at the most- one year ahead. This is my vision.

Q. As a professional with a broad knowledge of what's going on in the world, what would you say about the sector of agriculture in Greece?

Living abroad for long time, being able to cooperate with people from other cultures, and observe all these various different trends and characteristics of the sector, have given me a new perspective with regards to the solutions I can think of and provide, and enabled me to recognize the causes of the structural deficiencies in Greece.

Moreover, my knowledge combined by the experience I have gained by being the regional CEO of Europe, Adri-

atic and Middle East in a global leading Group, the Managing Director of two big entities, BoD member in many different companies, the former head of our biggest production site for specialty products which are exported worldwide, a member of the global management team of the Group also used to be a member of the global advisory board of the company, allow me to discover quickly the success stories of other countries, deep dive and replicate efficiently modern business models.

I believe that Greece has a good momentum in the agricultural sector, but unfortunately we are talking about private and isolated initiatives, with no clear frame helping, improving and directing these efforts. There is no vision and collective culture, and this impedes the creation of a long-term vision and perspective, isolating and exhausting the few open-minded and innovative professionals. This is where the solution lies. In the resistance, goal-orientation beyond and over adversities, and being able to collectively deal with a situation, instead of dividing and conquering. The nature of the problems of agriculture in Greece will not change; we need to change and remain committed.

Q. Gradually, the traditional forces of the agricultural supplies sector are transferred to investment funds, with either a long or a short-term investment horizon. How does this affect the entire sector?

I think the funds who invest in Agriculture are mainly focusing on speeding up the development, while they knew (or ought to know) from the beginning that agriculture is not a sector for quick and easy profits. Meanwhile, they speed up higher than usual, invest on development plans, and are not afraid to experiment. Besides, agriculture is a field of a fierce investment thrust and the nature of either funds or strategic investors has no impact on the prices of agricultural products. These will be affected by the status of the global population growth. Rational development will occur when –at the same time– there is a fund with strategic planning on agriculture.



Q. Do you truly believe in fertilizers or you are just a manager navigating this particular sector?

I started out 30 years ago, in the seed sector in the first company I worked for. Many years later I was involved in the plant protection sector. During the last decade, I am in the field of plant nutrition. Above all, I am a businessman who brings results all these years.

I want to be able to bridge the values in the food chain, continue to convey experiences and knowledge, implement ideas, work on the optimization of inputs, and continue to be able to change outcomes.

I feel and act as an entrepreneur 'intrepreneur'. Getting out of my comfort zone gives me motive. I enjoy creating contrasts, create and implement outside the box and beyond anything expected. I like to focus on solutions, and not on problems.

I generally believe in values, focusing in:

creation of good concepts and rewarding the good attempts not only judging from the results. Usually I go against odds when I want to make business and the difficulties motivates me.

The transition from Agriculture to Agrifood





1. AGRICULTURE or AGRIFOOD?

If we travel by train do, we say that this company belongs to the Train or Transportation sector? If we eat a hamburger from a canteen outside do, we say that this small enterprise belongs to canteen sector or to the food sector? This, more than ever, is obvious for each one of us now. If now we evidence that supply of healthy food is important when a catastrophe as Covid-19 hits the marketplaces, then it is a proof that food and agriculture are exactly at the same line when we talk about this industry and its global impact.

2. DIFFERENCES BETWEEN FERTILIZERS SECTOR AND FOOD CHAIN SECTOR?

Farmers, network of scientists, manufactures etc. continuously direct their energy and efforts to develop the best growing and living conditions for crops to feed the population. Fertilizers as one of the main inputs for this industry plays a significant role to match quality and quantity of crops for contributing to the smooth and healthy characteristics of the food chain.

Today's consumers are no longer satisfied with a blind feeding system and the crops modern nutrition methods (as today's 'fertilizers' stand) are the necessary component to achieve such a knowledge and advanced result. Likewise, because today's fertilizers are pointing to the 'more with less' principle, smart crop nutrition which influence properly the physiology and phenological stages to improve the qualitative characteristics of the crops is the KEY to avoid excessive use of pesticides, to improve exponentially the productivity of farms and serve significantly the 'FARM to FORK' concept of European Food Chain process.

Fertilizers is the “food of our food”.

3. HOW WILL COVID-19 INFLUENCE THE AGRIFOOD SECTOR?

This and next period will be extremely difficult for the global economy. Although COVID hit less and even increased a lot the importance of farmers and agriculture in consumers' perception, the passage from this crisis won't be wriggles free for any sector. We've been set back about 25 years in about 25 weeks! But this pandemic also provides a turning point in global Agri-food and set against the nightmare scenario, COVID-19 has also the potential to usher in a renaissance that will ultimately drive economy recovery, make us healthier and heal our planet.

Perhaps the most important step governments can take now due to the pandemic to advance agri-food sector is to make a comprehensive change in their perspective and approach to their policy which often have been

failed to recognize the social, environmental, and economic advantages of modern agriculture. The accelerated flow of healthy foods, services and skills is one of the principal reasons for the most rapid reduction of global poverty and now this must prevail and be secured & strengthened in the recovery phase by ensuring the sustainability of the farmers.

My tag line is
“progress is possible
but not inevitable”
-and I stand by it.

How bad the pandemic gets and how long it lasts is largely within the world's control. Ultimately, businesses in the sector must really believe that the future is not a zero-sum contest in which winners win only when losers lose. Healthy Agri-Food is a cooperative endeavour in which we all make progress together.

4. HOW SCIENTISTS WILL INFLUENCE THE FUTURE OF AGRIFOOD?

Now the majority of the scientists puts sustainability in the core of the business and we concern a lot for the sustainable management of natural resources and of the necessary actions we need to proactively take for climate changes by achieving balanced & qualitative development of crops yields.

This exactly is our role and being the global converters of commodities fertilizers and of past practices into specialties crop -environmentally friendly- solutions, we hope that we influence the Agri-Food chain positively by providing such added- value solutions for the food of highest quality and safety. Importance for us is the tribute to the role of research, knowledge, innovation, and digitization of agriculture in order to enhance efficiency in production.

5. WHAT INNOVATIONS WILL BE ADAPTED FROM THE MARKET THE NEXT 5 YEARS?

Yes, the smart thing to do is to predict the future, not to stuck in the presence. Now we all know that a lot of structural deficiencies have undermined the competitive advantages of the Agri-Food sector, no need to deep dive here. And we all know that in the future the nations will focus in this sector on growth and employment based on sustainability.

Agrifood and Agritech are both technological challenges of the Agri-Food sector.

So, Intelligent agriculture, organic farming, adoption of new technologies mainly through young entrepreneurship, embracement of more with less rule, agro-ecology and stricter conditions for food safety....these are the future innovations which -a lot of these- are already laying on our table.

A see Agriculture as a holistic SERVICE platform of absolute solutions which will be provided by experts rather than as an industry where only products are being marketed just for profit but w/o added value for the ecosystem. The role of future Agriculture is much more than this.

What matters in life is not the mere fact that we have lived. It is the difference we have made in the lives of others that will also determine the importance of the life we live. Agriculture / AgriFood meant to make this difference.

So agricultural models will be adapted to the new landscape and old-fashioned models will shrink. The future of agriculture is in absolute harmony with nature, rural world and public health and innovations must point on this direction.

Uncontrolled growth must be curtailed and the proper relationship btw environment, and society, ecology and economy must triumph.

6. WHAT ARE YOUR THOUGHTS ON WOMEN AGRIPRENEURSHIP (ENTREPRENEURSHIP IN THE AGRICULTURE SECTOR) TODAY?

I am aware of the obstacles that women have to overcome in this environment.

When it comes to leading Agrifood businesses only 28% of the women in the sector are managers or have top-level responsibilities in agricultural and livestock farms in the European Union. Imagine now with the crisis caused by COVID-19.

**I do believe that
Agripreneurship needs women.**

What kind of women? Women with passion, ideas and answers to the challenges that the Agrifood sector has to face for the society of the 21st century.

The corporate ecosystem must help to reinforce female leadership by supporting women with ideas or start-ups in initial phases in the sector.

7. YOUNG GENERATION OF AGRONOMISTS

I mentioned before that the young entrepreneurship is one of the most important keys for the future development of Agri-Food sector. But...even the best dairy can't milk a vulture. So, no matter good they are, how much they want to be better matters! Unless age it is just a number!

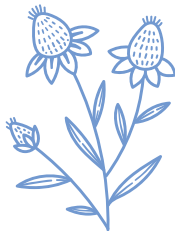
At the end, Passion and Attitude always makes the difference in any occupation. If individuals from young generation are PhD equipped and are not afraid to experiment, they will not fail no matter specific direction they will follow.

**Agriculture is one of the few
places that welcomes everyone!**

Backgrounds from Farmers to agronomists, from ecologists, engineers, economists, environmentalists to food experts and animal experts, everybody with or without any degree has a reason to be here, agriculture is a place for everyone to participate here. They need to escape from the old perception about agriculture and to realize

that this is a very attractive sector with great potential, with many interfaces to many other sectors and sciences where you might not be rich in few years, but you will have prosperity, successful duration and gaining for many years if you are willing to work hard and out of boundaries.

**Change is the only constant in our
life no matter where we operate
not matter what we are doing for
living. It's going to happen.
What each of us can influence is
how we manage it for the better.**



8. STARTUP ECOSYSTEM AROUND AGRICULTURE. WHICH IS THEIR ROLE IN THE ENTREPRENEURIAL COMMUNITY?

Yes this is a big global trend nowadays, a wealth of such initiatives are ongoing in developing countries to supply local markets with products... That's the power of true entrepreneurial spirit as the sector grows.

Start-up actors are leading partnerships with the sector to build market infrastructure, integrate sustainable agriculture into extension programmes and discover or forge market opportunities.

Combining cutting-edge technologies with a true entrepreneurial mind-set, the whole sector is disrupting the traditional inspection, this is extremely important, refreshing, and healthy!

**Good entrepreneurs always
are improving real impact value,
economic impact and,
at the end, environmental impact
of infrastructure and they are
building assets.**

Of course, Start-Ups need to understand that they should better think about their own value proposition rather than looking after benchmark and easy growth...

They should embrace sustainable practices and focus on long term value because there is short term value in long term thinking.

Agriculture always pays off, but it is not a place where someone can be rich fast, in a few time, you must wait to grasp results.

9. HOW IMPORTANT IS THE CULTURE OF UNDERSTANDING?

You know the famous quote: culture eats strategy for breakfast. I say, culture is before any structure and strategy.

We need to understand that we make ourselves up of two pieces when we make business. We're supposedly both moral and economic at the same time. And, therefore, it is very important each time that these double pieces of ourselves are smoothly combined, so that the result of another one comes out in which we are reborn. This is a culture within the business, and this is extremely essential for any result but also to tap, retain and develop talents.

**When you have a good culture
in a organization
leads you to yourself.**

The bad leader for instance (because the leader is shaping and spreading the culture) is the one who manipulates you and destroys the culture within an organization. On the other hand, a good leader who spreads

healthy culture is like a good teacher, they turn you over to yourself and say, "open wings."

By the way... culture does not only eat strategy for breakfast but also for launch, dinner etc....

10. THE ROLE OF COMMUNICATION PLATFORMS IN THE FORTHCOMING YEARS?

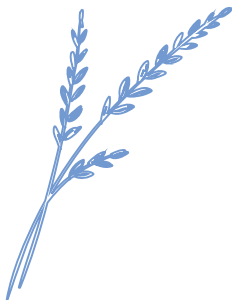
You agree I suppose that if we do not fully trust the possibilities of knowledge we move on to the need for understanding. Possibilities differs understanding. It's only with potential that we dive off a cliff! Understanding will stop us, correct?

So, platforms of communication and branding in our sector is all about understanding of different crop characteristics in different countries, understanding of good crop practices, at the end understanding of different cultures regarding crop stories and how to promote, multiply and implement successful cases and examples of extroverted entrepreneurs who constantly innovate in the sector and do ground-breaking acting.

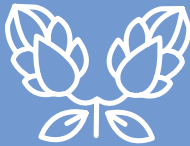
Modern digital initiatives will further assist the organizations to shift from product to crop & customer centric approach.

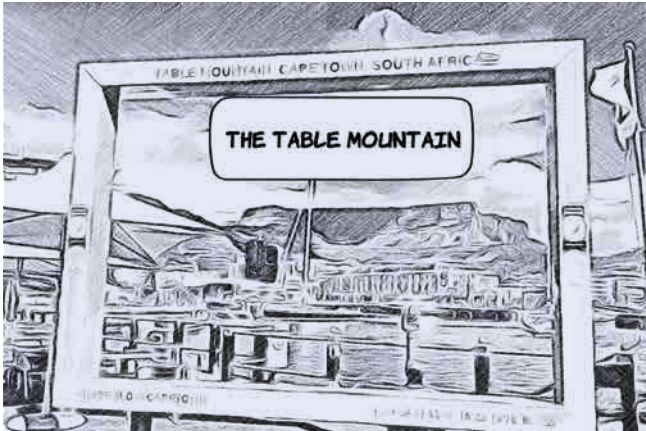
In my field, my vision for an interactive post-modern platform is to connect harmonically & sponsor properly the crop stories from different countries, farmers, and customers by giving them back the 'keys of knowledge', so the "keys" for more efficient production in order to promote at the end the best methodology for them to produce healthy food for the sake of the social and environmental well-being.

In the company I work for, I'm the initiator of the K2MC platform (keys to my crops) exactly for serving such a purpose.



The road to South





South Africa differs from other African markets which may not seem like most stable terrain for agriculture, as they are characterized by politically manipulated markets, weak legal systems and low pre capital income.

South Africa is a middle-income, emerging market with an abundant supply of natural resources; well-developed financial, legal, communications, energy, transport sectors and modern infrastructure supporting a relatively efficient distribution of goods to major urban centers throughout the region. Growth was robust from 2004 to

2007 as South Africa reaped the benefits of macroeconomic stability and a global commodities boom but began to slow in the second half of 2007 due to an electricity crisis and the subsequent global financial crisis; impact on commodity prices and demand. GDP fell nearly 2% in 2009 but recovered in 2010–12.

Unemployment remains high, at nearly one-quarter of the work force, and outdated infrastructure has constrained growth.

Daunting economic problems remain from the apartheid era — especially poverty, lack of economic empowerment among the disadvantaged groups. South Africa's economic policy focuses on controlling inflation — however, the country has had significant budget deficits that hamper its ability to deal with pressing economic problems.



STATUS *OF* AGRICULTURE

Main agricultural products in order of importance are: maize, wheat, sugarcane, fruits, vegetables, beef, poultry, mutton, wool, dairy products.

Agriculture in South Africa contributes around 10% of formal employment, relatively low compared to other parts of Africa, as well as providing work for casual laborers and contributing around 2.6% of GDP. According to FAOSTAT, South Africa is one of world's largest producers of chicory roots (4th); grapefruit (4th); cereals (5th); green maize and maize (7th); castor oil seed (9th); pears (9th); sisal (10th); and fibre crops (10th).

**The South African administration
has set a target of transferring
30% of productive farmland
from whites to 'previously
disadvantaged' blacks.**

Land reform has been criticized both by farmers' groups and by landless workers, the latter alleging that the pace of change has not been fast enough, and the former alleging 'racist' treatment and expressing further concerns for the intentions and speediness of the efforts for the project.

To reverse the damage caused by land mismanagement, the administration has supported a scheme which promotes sustainable development and the use of natural resources. Maize production, which contributes to a 36% majority of the gross value of South Africa's field crops, has also experienced negative effects due to climate change.

South Africa has a dual agricultural economy, with both well-developed commercial farming and smaller scale communal farming.

While South Africa has an economic and business environment favorable to the development of new agribusiness enterprises, it lacks the fertile land and climate advantages of other countries in sub-Saharan Africa. The land is generally arid and climatic conditions are not ideal for large scale commercial crop production.

Only 13.5% of the land area is farmable and only 3% is considered as fertile.

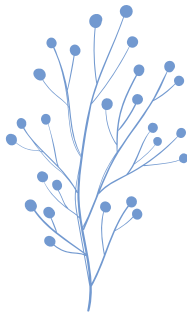
Over the past years, South Africa has undergone immense social and economic changes, with fundamental structural reforms resulting in an open, market oriented economy.

Dismantling state support to S.A. farmers combined with tax benefits did, however, leave many South African farmers unable to compete in certain areas against farmers from developed countries who receive generous state subsidies and dump their products in South Africa.

On the other hand, governmental initiatives to increase technological, sophisticate irrigated farmland has enabled many farmers to successfully grow high-value export crops and created great opportunities.

Giving the ratio between the number of food exports and imports, the establishment of a corresponding trade system in the country will be crucial for the food security. While the prospects of Agriculture in South Africa are positive, they could be significantly improved by implementing policies for alternative crops, strategic investments and by appropriately adapted research structures.

This will improve further the country's access to markets expand the availability of the necessary raw materials and offer to farmers –especially to young ones– alternative opportunities and the agriculture will become an important source of employment.



FOREIGN PLAYERS THAT TARGET
THE RIGHT SECTORS
WITH THE RIGHT STRATEGIES
WILL PROSPER.



THE 'KEY' IN MY OPINION
IS FOR ALL PLAYERS
TO "MAP"
THEIR STRATEGY
BEFORE ENTERING.

In searching for the promised Land





After twenty years of working in agriculture in Greece covering various aspects (seeds, plant protection products, fertilizers), my professional “fate” has brought me to be responsible now for a large region: that of the Mediterranean basin and the greater part of the African continent. This wide area presents all the contrasts as well as challenges. From the greenhouses of Turkey, olive groves and oil of Greece, strawberries of Spain to melons in Tunisia, the citrus fruit of Morocco and the cocoa trees of Cameroon. My current position has consequently granted me considerable experience with new crops, different ways of thinking and implementation, and primarily

with People of different cultures and backgrounds. It has also given me cause for much thought on the sustainability of farming in these countries and regions of production and I decided to share some of my experiences, thoughts and suggestions through a series of articles. The first of these refers to Northwest Africa.

THE EMBOLA CRISIS *AND* LATEST DEVELOPMENTS

What came out of the Ebola crisis in Africa that is of significance for farming in Africa but also for our own industry?

- Special warnings from the Food and Agriculture Organisation of the United Nations (FAO);
- Food restrictions and significant shortages of foods and other products (e.g., palm oil, cocoa, etc.);
- The enforcement of quarantine zones to restrict the spread of hemorrhagic fever, which caused such panic that citizens rushed to procure as much food as possible;
- Restriction of commerce through ports, leading to a reduction in the supplies of foods to several countries that import cereals, etc.

In the last decade, however, there has been a counter-trend in Africa which remains strong. Its chief characteristics are:

- Multinational giants investing in the farming industry in Africa, showing the way forward for agricultural production for those countries
- Purchases of large areas of land and investments in huge (by European standards) monocultures in order to secure a large-scale farming industry with parallel pressure on small independent farmers.
- Investments in training of members of the farming communities to increase crop productivity and to secure future labour resources with higher productivity levels
- Utilization of the most productive cultivation methods adopting new ways and the creation of agricultural product networks.

It is no secret, after all, that two thirds of the agricultural land currently targeted for purchase/investment is in Africa.

WHAT ABOUT FARM HANDS?

During harvest periods the demand for farm labourers is very high, given of course the labour-intensive nature of the work. This leads unfortunately to the exploitation of child labour under extremely harsh conditions. ***“Most children love chocolates but there are some that loathe them,”*** is a common saying that refers to the children who work on cocoa plantations.


At the same time, enormous pressure is exerted on producers to keep the labour cost low.


IS THERE ANYTHING POSITIVE BEHIND ALL THIS?

The developing countries of Africa have a low debt level, an abundant supply of cheap labour (not in direct relation to productivity), attract significant levels of foreign investment and, finally, demonstrate significant growth. The huge potential gives them good reason to look to the future with optimism, to overcome their weaknesses, such as the level of poverty, corruption and social inequalities.

**HOW CAN THOSE OF US INVOLVED IN
INPUTS INTO THE AGRICULTURAL
PROCESS CONTRIBUTE TO IMPROVING
PRODUCTIVITY AND EFFICIENCY?**

Let's first look at the following questions:

 How can a company active in the agri-food chain (a more fitting description than fertilizer manufacturer) contribute to maximising crop harvests?

 Can we introduce or further promote new crop care methods to replace "Traditional Farming", which requires a lot of labour working in extremely harsh conditions, given the huge areas involved and the pressing demands of profit maximisation from a work force that has not yet attained the level of other, more developed countries?

**Where do the interests of the farmer,
industry and the environment
meet with the improvement
of conditions for the work force?**

Let's see if we can help on one of those problems. As we well know from examples in the developed world, the overuse of fertilizers without knowhow from specialists has led in some areas to pollution of the soil and water resources.

On the other hand, in most of Sub-Saharan Africa, they are used less and "traditional" fertilizers are still applied, using moreover traditional methods which, together with the lack of soil analysis (and therefore knowledge of the real nutrient requirements), have led to the removal of nutrients from the soil not replaced by other crops, this soil degradation resulting in lower returns.

For instance, the applications of slow release fertilizers presents itself as one of the solutions to the problem of soil infertility and crop productivity.

The use of slow release fertilizers means a reduction in the number of fertilizer applications and by extension a reduction in labour requirements and costs. Imagine large areas of tropical cultivations using products providing a controlled release of nutrients over 6 or 12 or 16 months... The result will be combined benefits to the conditions of

the crops as well as the environment and the upgrading of the productivity of labour force, while reducing endless hours of work in very difficult conditions.

What could be a more reliable and effective solution in African countries with such characteristics than making nutrients available to plants in a constant and continuous flow according to their real requirements?

Naturally, to achieve the correct nutrition/topdressing, the appropriate parameters need to be calculated:

- ▶ appropriate fertilizer for the soil and crop
- ▶ amounts to be added each time
- ▶ method and timing of application.

The proper design of the plant nutrition management programme by specialists in plant nutrition, taking into account all the parameters, is vital to maximize results in tropical cultivations.

For companies ready to contribute in solving problems, innovate and be passionate to meet Africa's unmet needs there is extraordinary opportunities, for growth. But, they should be driven by a deeper -than only last profits- purpose!

And I ask myself:



***Is it not worth investing
to promote such technologies?***



***It is not worth putting at the core
sustainability of Agri-food production
building on practices which embrace
rapidly modern technologies, use fewer
chemical inputs, carefully manage soil and
water resources and work hand-in-hand
with nature in a synergistic manner?***



Is it not worth our contributing, in whatever small or large part we can, to the increase in productivity for the investors but also with the principal motive of a parallel improvement in the working conditions of the labour force, both on the large intensive cultivations and on the small and medium farms, which represent the backbone of production, so as to bring harmony to the sector?

PILLAR 3

PHILOSOPHICAL
ORIENTATION
OF THE
AGRIFOOD
SECTOR



Uncertainty, Fear, Risk and the Unexpected





If someone evidences that smooth supply of healthy food is very important when a catastrophe as Covid-19 hits the marketplaces, then it's a proof that food and agriculture are exactly at the same line when we talk about this industry and its global impact.

Farmers, and the network of scientists, governments and manufacturers which supports them, continually direct their energy and efforts toward developing the best growing and living conditions for crops to feed the population.

On the other hand, even during this unexpected crisis, today's consumers are no longer satisfied with a blind feeding system.

Until quite recently, the primary objective of food production in Europe was to produce enough food at affordable prices. As the productivity of farming improved exponentially, the consumer increasingly took quantity and affordability for granted and began to focus more attention on the quality and safety of food and the way in which it was produced.

That's why, enhancing soil nutrition and defending crops and animals against pests and diseases is a constant process made ever more important by the world's growing population and the consumer's demand for a safe and wholesome food supply.

**The above factors do not occur
spontaneously.
They require supporting policies.**

Has been seriously wondered by anyone how a small farmer can produce competitively when he is not seriously connected to the markets, when there are not consolidated policies to financially support him for unpredicted disasters or there is only forerunner support? Why to support him financially becomes very difficult, when his profit is marginal -or often does not exist- when the final prices of the products he sells are skyrocketed at the supermarkets and when he is deserted by every middle man in a distribution model full with great distortions and imbalances?

Perhaps the most important step governments can take now to advance agriculture and reduce cost disparities, is to make a comprehensive change in their perspective and approach to their policy which often fails to recognize the social, environmental, and economic advantages of modern agriculture.

There are difficulties some times to distinguish early the noise from the message and often a 'garden-variety' is far different from a deep crisis but the COVID-19 pandemic provides a turning point in national and global affairs. The severity of the shock and the degree of vulnerability matters now and many nations are far too close to their stall speed.



**But we can only help
and contribute
by not stoking rumors
or panic buying.**

Our attitude must stand tall to help secure the long-term sustainability of any sector we operate because due to Covid-19 collateral implications there are potential downsides to the development of global food chains, this is not going to be a wriggles free passage.

On the other hand the countless emergencies generated by the virus, give us the floor to think deeply about why the international community was so unprepared for an outbreak that was so inevitable taking in consideration is hardly the first time we've faced global catastrophes.

The accelerated flow of goods, services and skills is one of the principal reasons for the most rapid reduction of global poverty in history. Improved access to employment, nutrition, sanitation and public health, added over a decade in average life expectancy to the world's population but on the other hand the heads of the nations failed to manage the downside risks generated by globalisation which, if continue to left unmanaged, we will suffer escalating systemic risks, as they say.

Europe, especially, has to decide and take position to the dilemma if wants to be a self-sufficient region or an export-import region regarding production of agricultural products.

The answer on this question will lead to fundamental changes in the supply chain, to the 'protection' of its farming system, to the minimum profitability's levels of the producers & distributors are involved in the chain and will shape the direction and the vision for the next thirty years.

No mention that an 'honest' answer will trigger optimization of the global supply chain model backing up with necessary financial initiatives and solidarity measures to

support poor nations by providing cheaper food through a smooth supply.

Up to now, structural deficiencies have undermined the competitive advantages of the agri-food sector and the structural design of the promotion of agricultural products by ensuring the sustainability of the farmers between different countries and not through unstructured competition without reason which brings in privileged position some and in weak position others no matter proximity of areas and different indicators regarding legislation and economy's status.

Now there is no scope for a fiscal stimulus for all. With supply chains broken and firm break of any social activity, to strengthen the capacity of national governments and farmers to protect and enhance food security and manage their resources sustainably, is a game-changer management.

That's why strengthening the competitiveness of agriculture now is a wrecking ball which will ensure, on the one hand, the sustainable management of natural resources and, on the other hand, the actions for climate changes

by achieving balanced territorial development of rural economies and communities, creation and maintenance of jobs.

**Meanwhile monetary policy
has been stymied as interest rates
are already close to zero.**

Governments therefore stark focusing on providing all in need with a basic income to ensure (*temporarily?*) that no-one starves as a result of the crisis.

Although the idea of basic income guarantees is undeniably a high ideal, from the perspective of the world as it was up today and seemed unrealistic only few weeks ago, now it is at the centre of every serious agenda and it will not face the same, insurmountable obstacles to a possible introduction as before. A view which is gaining momentum and based foremost on the belief in people after the global damage from Covid-19.

There are many views that have been expressed at international level both on the causes and characteristics of the Covid-19 crisis and on policies to defend.

If we want to delve deeper into the causes of the virus, it is a good opportunity to also take into account other aspects such as climate change and the impact on the natural ecosystem, the model of industrial agriculture, the increase in consumption and the evolving characteristics of the food chain.

There has been much of progress along with the use of rigorous experimentation about the transfer of pathogens and its relations with the climate change. Human activity but also the industrial model of agricultural production without rules, affects biodiversity and stabilisation of climate change.

This will shape changes of ecosystem and soar much higher rates in the near future due to rapid increase of global demand for agricultural products and food.

FOOD
+
ENERGY
+
WATER

THIS IS WHAT THE
UNITED NATIONS
REFERS TO AS THE 'NEXUS'
OF SUSTAINABLE DEVELOPMENT

Efforts to meet the world's growing nutritional needs can occur -and this is the standard in many cases — in harmony with nature, the rural world and public health. Uncontrolled growth must be curtailed, and the proper relationship between nature and society, ecology and the economy must triumph. The global food system is in transition and crises such as the climate and environmental and the recent health one are showing the priorities we should focus.

An important element of differentiation between distribution models is their close relation with the natural resources, since the differentiated, qualitative and high value-added production is more environmentally friendly than the mass, the 'industrial' production.

**But the dynamics and likelihood
of occurrence of threats in food chain
depend on a larger number
of risk factors or drivers.**

You cannot be in a firefighters conference and no one allows to speak about water. So to running simulations to find the cracks in the system taking in consideration all above factors while an unexpected crisis hits, is not a thinking we can easily sidestep.

A fair, healthy and environmentally friendly system along the entire value chain, which should be implemented by all of us involved in the sector, should lead to the adoption and implementation of sustainable production approaches such as intelligent agriculture, organic farming, agro-ecology and stricter conditions for food safety, for our health. These values will be combined with a reduction in the use of fertilisers, plant protection products and antibiotics (*more with less principle*), different way of acting on different segments such as transport, storage, packaging, food waste, but also backed up with initiatives for the proper consumer information, actions and information regarding their choices and the consequences for the environment, nature protection and nutritional health.

Particular importance is the tribute to the role of research, knowledge, innovation and digitisation of agriculture in order to enhance efficiency in production to cope against the modern environmental and economic challenges.

Seems there is no wall high enough that will keep out the next pandemic similar as is the case when we talk about climate change or terror and other global threats. But we should not leave these walls to inhibit us from placing new technologies, promote and finance most of the collective ideas to cooperate closely and efficiently to address and solve these challenges.

By learning to prepare and cooperate we would not only learn to stop the next pandemic, but also to address climate change and other critical threats. Yes, rightly we are pessimists for tomorrow living in this crisis but we should forge today a sufficient ground of opportunities to become optimist about the day-after-tomorrow.

Not only to turn the communities around to heal the gaping wounds that will be left by the crisis but to take the opportunity to flush the inevitable toxins out of the health system.



The day after, to mitigate rather than aggregate any imbalances, this will be a great gain over the incumbent.

My strong turf is the Agro-food sector and I am an ambitious and tireless sponsor of the agri_culture with its wider definition and importance as per above description. But for many others, farming is often taken for granted.

We expect food on our table and clothes on our backs because we went to the store and bought them but, we would not even have these products to buy if it weren't for our farmers doing endless hours of labour in unfavourable weather, financial and global trade conditions to provide these for us.

So now, take some time to really think about all that farmers give us.



Without them, we would not have our healthy foundations we have today.

The Farmer — by Amelia Barr (1831–1919)

A global network managed by institutes, governments and experts will prevent, prepare, and respond to food safety events and emergencies and will contribute to efficient prevention and control of spread of unsafe food through information sharing among countries in case of food safety emergencies.

After food has been harvested, improved transportation and infrastructure, better insulation of food storage facilities, reductions in packaging and food waste, and more efficient cooking devices offer the possibility of reducing additional energy use in the food sector.

Exactly now is the time to start thinking and recognizing the fundamental importance of the sector and building the necessary bridges at home and abroad to embrace, back up and appreciate the principle 'from farm -to- fork' to our life.

It is clear that the restrictions that have been put in place to reduce the coronavirus spread, are going to bring the markets into economic recession although is very early and hard to predict for an unexpected event of significant consequence and improbable nature, the outsized consequences on our businesses.

One concern already evident in the horticulture sector where situation has exerted strong downward pressure on the products' prices paid by their suppliers so that it becomes impossible for those farmers to pay decent wages, or to provide good employment conditions for their workers -if any- or minimum wealth for their families. This risk is particularly high when food retailers' competitive strategies are predominantly price-based.

In other words, the picture is potentially a mixed one. Let's say and stick that there is a foundation of good practice on which to focus and build the future actions.

To cut a long story short now is the time to rip up the rule book of food chain and to turn uncertainty into understanding, volatility into vision.

There is a short term value in long term thinking and changing an embedded perception as big as this about the production of products and for the role of agriculture, doesn't happen in a vacuum.

Provocative I say it's been desperately depressing to watch as communities and governments have failed to tap into this energy has been unexpectedly created as a strong collateral effect to this global crisis. Negativity breeds negativity and always we should find positive slants in every difficult situation we face.



PROGRESS BEATS
THE CRAP OUT
OF FEAR:
EVERY-SINGLE-TIME!

Is this covid19 crisis bothering you?



*Things I Wish I Learned
Earlier and Differently*



Why it is so difficult for the governments to spot new and radical changes quickly, to neglect their blindness to the opportunities have been raised by this crisis and develop their citizens potential?

⇒ **WHY** are organizations capable of missing opportunities up so profoundly in such a record time?

⇒ **ARE WE** so naive to argue and believe that there are national solutions to a global crisis of such a size?

⇒ **HOW** it is possible that corporations -even when they understand the fundamental challenges coming at them and the directions they need to take- are often incapable of moving and seem to be too paralyzed to move fast enough to respond to new business models are triumphing quietly around them?

⇒ **WHY**, instead, we do not apply and accelerate the 'day after tomorrow' thinking?

CRISIS

Watching the evolution of the pandemic which has plunged the world into this recession is a lot to learn and, unconsciously, a fear of failure and uncertainty institutionalize while challenges continued to pile up. Despite this, on the surface at least, our response system looks remarkably normal versus the lack of plans by governments to deal with such a threat- especially given the scale of the disruption we've just experienced which it was supposed to be the subject of contingency protocols for states; there have been more failures successes. Likewise, we have learned that, as in every crisis, there

is now a refusal by portions of the population to admit the seriousness of the situation and to act with collegiality and responsibility how to overcome fake news, rumors, conspiracies and biased mind-set coming from continues political games which distract us from the immediate and coherent response to the risk.

Likewise, putting people to choose between privacy, 'rights' and health is, in fact, the very root of the problem.

We can, must and should enjoy both privacy and health.

But to achieve this level of compliance you need TRUST (in science, in authorities and in the media) as the long-term prospects for families dependent on incomes that come when market grapples with confidence without Mad Max scenarios and erratic behaviors. Over the past years irresponsible politicians have deliberately undermine trust in science, in public authorities and in the media and now these same irresponsible politicians be tempted to take the high road to authoritarianism, arguing that we just cannot trust the public to do the right thing.

But they should know that a self-motivated and well-informed population is far more powerful and effective than a controlled, ignorant population.

As each country moves along the COVID-19 curve, we can see a glimmer of increasing optimism levels but, that said, the next period is going to be extremely difficult. We've been set back about 25 years in about 25 weeks as they say! In countries, skyrocketing unemployment is driving up insecurity to catastrophic levels while major parts of the world will tip towards a COVID-induced famine of "biblical proportions. Set against the apocalyptic nightmare scenario, however, COVID-19 has the potential to usher in a renaissance that will drive economic recovery, make us healthier and heal our planet. Changes were already beginning. COVID-19 speeds up these trends so now; we should ask ourselves not only how to overcome the immediate threat, but also what kind of world we will inhabit once the storm passes. Above all we have to confront the current reality with candor.

REACTION

Therefore, the crisis, in another view, is the closest ally of the capable and daring and if you have insight, flexibility, and willingness to take risks, then de facto opportunities will emerge.

Likewise, crisis has overturned stereotypes by pre-ordering distance work, the use of automation and technology etc.

For example the pandemic not only highlighted the remote-working model, but made it a catalyst for us to move to it at a rapid pace, which would not have happened so immediately if there were no emergency conditions. Working from home didn't seem like too much of a challenge and the model will remain, of course, when the pandemic wave is completed, because it contains positive elements. It reduces the operating costs of companies, can help reduce unemployment, annihilates several employee costs etc. As an example according estimates

from Korn Ferry®, the number of Americans working from home ballooned to more 80 million (it was 3.7 million in 2017) when states first ordered people to stay home. While that number has declined since the lockdowns were reduced and some firms began bringing workers back to the office, everyone expects millions to continue working remotely even after the pandemic ends.

DISTANCE WORK ETHICS- copyright : Capital

Yes, this has many positive elements, but it is not a panacea. It must work in the right balance with physical presence and interaction in workplaces which are values will still prevail after all. Still, while technological possibilities ultimately proved redeeming in not losing touch, the silence, the absence of many sounds and activity in noisy cities is something incredible and unprecedented.

But as we contemplate this future, tough questions need to be asked. I believe that the next period will be a constant struggle that requires emotional intelligence, reordering the global model of the care economy. Values such creativity, agility, decisiveness, and empathetic style will prevail through closer collaboration, social empathy and

solidarity. In the United States, for example, FMI (food-industry association) and Eightfold AI have collaborated to create an online marketplace, ([Talent Exchange](#)), that matches workers who have been recently laid off with critical open jobs, based on their individual skill profiles.

The journey will be long, how long is impossible to fathom. However, on this journey we must balance survival and sustainable development, so it takes endurance, patience, perseverance and courage.

All sectors are in the midst of an unprecedented transformation and, especially, many low and middle-income segments must «violently- innovate» to meet the challenges they face. The coronavirus, in addition to the destruction and chaos it has caused, has also accelerated the need for change which the type and size of these cannot be clearly captured. The only sure thing is that they will be changes of large scale and influence.

**What is needed now is creativity,
innovation and collaboration with
unlikely manners.**

India, for example, which had already invested in a world-class digital payment system, was able to transfer almost immediately cash to 200 million women once the crisis hit. This not only reduced COVID-19's impact on hunger and poverty but also advanced India's long term-goal of empowering women by including them in the economy. Another example: The eight members of the West African Economic & Monetary Union, allowed people to open accounts by text message or telephone and follow up later to verify their identity in person. More than 8 million West Africans signed up for accounts while their countries were in lockdown.

The crisis has undoubtedly created unprecedented fear, uncertainty and fatigue so we need the right leaders to navigate our organizations, societies and countries back to recovery and beyond.

**The boxer, Mike Tyson,
had a point when he said “everyone
has a plan until they get punched
in the mouth.”**

Therefore, a new profile of leaders (in politics and business) beyond strategic targeting and day-to-day management will be invited to make a shift and demonstrate a new profile, ethic and culture that is more anthropocentric, aligned behind widely accepted goals and focused on solidarity while forces overhaul of corporate eco-system's welfare.

LEADERSHIP

Smart, forward thinking leaders will now have to replace power with sensitivity in order to lock in the new ways of working so to accelerate growth in tandem with the flattening of the curve. To be exposed to their people, to understand and bend over their problems, to come forward to the front line. The organization wants its leaders ahead of the crisis more than ever.

**Self-disruptive leaders,
learning to be agile, self-aware with
emotional and social intelligent.**

Leaders who are purpose-driven, assured but humble. Leaders with attitudes enabling them to keep pace with the rapidly transforming environments that threaten slowing-moving peers. Leaders who do not make their teams, and the societies, dependent on them but those who can motivate people behind and around their vision, their 'great idea' and then empower others to be well-positioned themselves to achieve. Only by these attitudes will attract, inspire, transform and retain talent because talent will be the at the end the catalyst of the changes, the true differentiator!

The 'Emperor must wear new clothes' now, ego and over-confidence must 'leave the building' and close connection with the execution of the ground is now essential. The crisis will hopefully act as a platform for leaders to make bolder choices and adopt new alliances to help organizations swiftly capitalize on critical opportunities as they arise. This requires flexibility, co-creation and cooperation, since several of the challenges concern an entire ecosystem. Now uncertainty confronts us with a race against time that certainly does not favour formal approaches that are now based only on analyses, discussions and planning but above all on innovation, experi-

mentation and the transition to the digital age. The arrival of the “work of the future” is on the table.

Honeywell's former CEO Dave Cote — who successfully led the company during the Great Recession in 2008 and added \$60 billion to its stock market value before leaving in 2017 — gave two critical “tips” to CEOs amid the Covid-19 crisis:

①

“Keep your employees close because you’ll need them in the recovery phase.

Make very few layoffs. Instead, choose to give unpaid leave.”

②

“Don’t get bonuses in the midst of a crisis”.

Employees do align and share a common point of reference for their company. Now fortunately they do not forget the basic prerequisites like commitment, sense of ownership, and drive waiting from their companies to show off the values and finally coordinate their practices according to the values they claim to have. In the new normal we must seek for a holistic reassignment, reboot and reconstruction based on our most invaluable asset: human capital! Individuals who are agile, flexible and possess what it's called growth mind-set.

From a 'positive point of view' the absence of the fast pace of everyday life is a great opportunity for introspection. An opportunity to appreciate more of the important things we had, to understand which of what we were seeking is not missing and was therefore insignificant. But also an incentive to think about what we want to change when this is all over. This 'brake' may has been refreshing and now we need to think carefully to adopt other than «one-off silver bullet solutions», forerunner changes and fait accompli, if we want to survive in a very complex world and unlock our true potential to drive a lasting impact to our life. The pandemic will make us double our efforts to protect human lives. In other words,

the dominant cultural reaction to the coronavirus will not be resignation, as it would in other decades, but it will be a mixture of rage and hope.

***“The best human minds
no longer spend their time
trying to give meaning to death,
instead they are busy
extending life.”***

Yuval Noah Harari says.

Clearly the force majeure that is COVID-19 has not impacted every industry equally but, for sure, denial is a non-go phase for corporations and rebuilding their customer experience by appealing to changing values will result in a profitable, and perhaps much-needed revival. New ideas, new business models and new technologies threaten to undermine companies' core business, so, right now; they should start to consider significant changes, innovation and how to put sustainability at the core of their business model. They should also carefully review any structural inefficiencies and vulnerabilities

that the current crisis has made visible in their operating model and decide on what can be done to address them. For the companies will not act like this, there is no other choice but to play the waiting game.

I believe that this is precisely the phase of real change which while until recently it was perhaps considered as far-fetched, is now more than necessary. Now is the time to be 'generated' and emerged real leaders who will make a true impact. Leaders with innate confidence to do the right things!

New technologies and digitalization by itself is not the disruptor even though, when implemented, will dramatically increase intelligence and completely reshape the economy. Not being customer-centric is the biggest threat to any business. Being a pace-setting and coercive leader is an old fashioned way of thinking which has 'left the building' nowadays.



BEING A 'COMMAND AND CONTROL'
RATHER THAN
A 'LISTEN AND SENSE' LEADER
WHO DO NOT BELIEVE BOTH IN PEOPLE
AND THEIR ABILITY TO CONTRIBUTE
AND DEAL WITH UNEXPECTED
RESULTS WHEN TRUST LAYS ON THE
TABLE, THIS IS THE REAL BIG THREAT
TO ANY SOCIETY.

For a long time many societies have cited, allow me to say, leaders' bullshits!. In a today's world characterized by rapid changes, yesterday's leadership paradigms risk and must becoming redundant. Our life and well-being standards and perspectives becoming harmful if we do not grow up to take our own responsibility but follow leaders trapped in yesterday's mind-set instead of giving the credit to other lifetime ethic models. If we continue to do so, we just struggle to find our place and voice in this new world without having a lot of chances!

So, there is a vital need to stay stable in our ethic objectives and flexible in handling of how we are steadily shifting to capture abundance in our life and in our business.

While some companies may need to enter a long and difficult period of slow rebuilding or even become obsolete, others in the same sectors will abandon the false sense of security of the past, they will challenge the incumbent and will definitely be able to find near-term opportunities, embrace and implement strategic moves, partnerships, innovation, and new ways of working and collaborating to keep the absolute worst from happening. Only such as, they will be able to cushion the economic shock will face.



**There's no way
we're going back
or anchoring!**



Countdown to the next pitfall





Going through a pandemic year with travel restricted, mass gatherings banned, social distancing required, and supply chains interrupted, there is no longer business as usual in agricultural sector. The opposite, we've accelerated about five years ahead in our timeline and past experience must be no longer overrated if we want to successfully confront new challenges.

This is a prime time for Agri-food business modes transformation and leaders taking decisive action to change how value is created is one of the keys to surviving business in today's geopolitical turbulence.

Realizing that sustainability is not a passing business trend but rather at the forefront, making now radical changes and go beyond baseline compliance by acting with integrity and social commitment will have tremendous performance implications. The sector had always plenty of strategies, but lacked viable business models pursuit value creation and capture where everyone wins.

The market and society increasingly require fresh food of absolute quality, with modern, environmentally friendly packages, with all the healthy nutrients and with more flavour. They want it at any time of the year, to be close to their home, at affordable prices, long-lasting characteristics and with complete food safety. If all these are

possible, I assure you that it is thanks to the research carried out by responsible actors of the sector with the farmers on the top.

The fundamental challenge facing agriculture nowadays is precisely that the innovation & harmony with nature should flow as added value everywhere. The leading position of many export countries can no longer be maintained solely on the basis of price. There will always be a competitive third country that, due to its social and economic conditions, can always produce cheaper than someone else, so this is a lost battle and a waste of value in the long run.

Only the creation of high-quality products meets the demand of producers and of final consumers and at the same time ensures the economic, environmental and social sustainability of the entire food chain.

In times of massive uncertainty the mind-set of the great leaders of tomorrow's will create new possibilities under high levels of unpredictability, produces added value for the community and drives action through compelling deal making. The leaders should promote collective intelligence, encourage daring attitude and experimentation which embraces imperfection and rewards good endeavors. At the end, the Green Deal is Europe's man-on-the-moon moment. This encompassing initiative makes the difference and it is so important; in that it creates the conducive ecosystem and the opportunities necessary for the market to move forward and gives the signal to the players to invest resiliently because attracts broad support both regulatory and financial.

Now is the time to see the business leaders really starting to put their oney where their mouth is. At the end, what gets you out of bed in the morning? How can you make a big difference in the lives of others?

YOUR PURPOSE
FROM THE FIRST DAY
YOU ARE DOING BUSINESS
HAS BEEN TO HAVE A POSITIVE
AND LASTING IMPACT
ON PEOPLE DEPENDED ON YOU
AND SOCIETY IN GENERAL.

Eating soup with the knife





Why does Google rent goats every year? The company do not, of course, want to do any experiment or turn cows to programmers. Around the offices there are fields and the fields need mowing, since the grass grows. To reduce the risk of fire instead of using lawn mowers that burn oil and pollute the environment, they bring goats simply to graze.

Will a child born today be able to live in his country 50 years later, or will the climate crisis have hit countries to such an extent that it will have caused massive changes

in society and global upheavals that we see in science fiction films? Her /His future will be a 'star trek' or a 'mad max' image? We are heading towards the desertification of countries and to what extent? Where do they begin, where do collective decisions continue and where does individual responsibility begin?

There are three main variables in the debates at the globe on saving our planet: The size of consumption worldwide, the size of the world's population and the pattern of human nutrition.

For many years climate change was considered a distant risk that few believed would come at all. Today's rhythms usually erase the thoughts to future demands and we have come to focus on today's urgent risks. The accumulation of large debts of countries, the continuous fiscal deficits, the great inequality of wealth in relation to poverty, education and health systems, the integration of new technologies, investment and anaemic development, etc. it is a reality that has made necessary and difficult hierarchies and for resources to concentrate on precisely these problems.

But what price to pay to still downplay the challenge of climate change will be exponential and based on the perceptions we maintain, our behaviours and our ignorance.

**Even today, there are perceptions
that climate change
is the theory of some ulterior
motives of people who like
to create confederations
for their own benefits.**

Agriculture contributes to climate change (e.g. it is responsible for 10% of greenhouse gas emissions in the EU) but is also affected by it (e.g. extreme weather events, rising temperatures, reduction of water availability, etc., which lead to a reduction in productivity and yields by extension). To tackle climate change, the EU needs to reduce greenhouse gas emissions from agriculture and adapt its food production system. In the face of growing global demand and com-

petition for resources, the production and consumption of food in the EU must be seen in a broader context linking agriculture and food security. Therefore, the agricultural sector should make adaptation to climate change one of the top priorities in order to improve its resilience to extreme events such as drought, heat waves and floods.

The economic impact of extreme weather conditions, taking into account the droughts and heatwaves of the summer of 2018, 2019 and 2021, have already been felt in agricultural sector and the market is already suffering economically from these extreme weather conditions which will be multiplied in short term i.e. unusual temperatures and precipitation are damaging crops while water resources are stressed by drought or polluted by algae blooms and wildfires etc.

Therefore the question is: does today's agriculture contribute to the magnitude of the problem or at the same time it is a victim of a perverse strategy? The new agriculture of tomorrow, supported by new technologies and policies, is expected to ensure the adjustments needed to avoid harming agricultural production and to contribute decisively to the solution of the problem; How much

can culture change help what today is not feasible to make it possible in the future?

There are many mechanisms that nature hides and which we are slowly discovering. Thermal change affects natural phenomena, extreme events are exacerbated in a non-linear manner and, now, we must seize the opportunity that new, green agriculture gives us for our own mental and biological evolution.

Some terms defy definition and sustainable agriculture has become one of them. We have to stop saying conventional is bad, ecological is good. That makes it so hard to find solutions and common ground between different ways of doing things.

**There's only ONE agriculture which
can be effective in preventing by
eradicating mal practices and
contribute to a healthier planet.**

Dubbed "beyond sustainable," regenerative agricultural methodologies seek to add to the soil through a self-nourishing ecological system that benefits the environment in the process. At the end, global food security is strongly determined by crop production. Climate change-induced losses to production can occur directly or indirectly, including via the distributions and impacts of plant pathogens. However, the likely changes in pathogen pressure in relation to global crop production are still poorly understood.

On the other hand, amid increasing consumer demand for transparency and a multitude of labels and initiatives, it can be hard to define what's truly sustainable in the global agricultural system.

By basic definition, sustainable food systems do not take away from the soil or environment. They seek to maintain Earth's natural resources.

But about one-third of the world's topsoil is already acutely degraded, and the United Nations estimates a complete degradation within 60 years if current practices continue. According to a 2019 UN report, nature is declining globally at rates unprecedented in human history, with the pace of species extinctions accelerating. Given this current state, are sustainable agriculture activists limiting themselves by merely maintaining?

**The idea is to create farm systems
that work in harmony with
nature to improve quality of life
for every creature involved.
We should realize that nature
is more collaborative than competitive**

Nonprofit Regeneration International claims that transitioning 10% to 20% of agricultural production to best practice regenerative systems will sequester enough

carbon dioxide to reverse climate change. And studies have found that applying this intensive grazing management increased soil carbon sequestration and reduced the lifetime GHG impact of grass-fed beef by 24%.

A 2016 study at Texas A&M University, supports the claim that appropriate grazing management can sequester enough carbon to offset GHG emissions. "Incorporating forages and ruminants into regeneratively managed agroecosystems can elevate soil organic C, improve soil ecological function by minimizing the damage of tillage and inorganic fertilizers and biocides, and enhance biodiversity and wildlife habitat," the authors write.

**AI has been witnessed suggest
that more people that manage
their soil better, either in grazing
or cropping systems,
the more carbon will be
in the ground.**

Today, more and more institutions, corporations, and growers are becoming interested in sustainable agriculture. Organizers highlight the positive externalities of greener agriculture methodologies: climate-resilient systems, technology which helps to bolster supply chain traceability with cloud-based tracking systems (for livestock etc., agri-tech which will help transform and protect local food systems and creates long-term well-being of farmers etc.

But 'first who – then what' so we're going to need smart people operating this green system of harmonization and synchronization because it is an art, not a science. The implementation of strict measures immediately will lead to the reduction of greenhouse gases and emissions of air pollutants, to better management of soil, land and water resources, which in turn will contribute to the preservation of local ecosystems and biodiversity.

Can it scale? Large companies have the funding for sustainability initiatives to back these efforts—and the tech to support it even further. But for smaller-scale, family farmers looking to transition, it does come with a cost. It takes a little while. This transition is a challenge—but

there are techniques and it's got to be market-driven and increased consumer demand will make it easier for more farmers to justify and invest in the transition. With more young people entering the field and more farmland rental options for those unable to buy, the opportunity to collaborate for collective change stronger than ever and many first-time farmers are embracing the regenerative promise of restoring a broken agricultural system and helping consumers understand the meaning and implications of these 'new' practices.

Managing in the midst of global uncertainty and minimize the fallout if not considering seriously the climate change, traditional planning and established strategies are not enough and, in essence, the reality of the 20th century is under fire in the 21st. In life, for instance, very few things are more valuable than water but why wait to understand the effects of climate change when it will be too late for everyone and the price of water reaches or even surpasses that of oil? After the aspirin kicks in, now, we should step back to consider the big picture. Consider what is happening, why it is happening, and how to adapt. We must respond with foresight, intelligence and, above all, empathy.

THE MORE DIVIDED THE WORLD
BECOMES, THE MORE WE NEED
CULTURALLY AND EMOTIONALLY
INTELLIGENT LEADERS
IN AGRICULTURAL ARENA ABLE TO
BUILD BRIDGES OF UNDERSTANDING
AND NAVIGATE THE COMPLEXITIES
OF THE INCREASINGLY ROLE OF
AGRI-FOOD INDUSTRY IN A POLARIZED
WORLD OF CLIMATE CHANGE.

Acknowledge of the challenge and act by optimizing to its peak the social responsibility of individuals who are in the sector will maximize lifespan and save money and peace of mind in the long run.

Responsibility and ownership should lay everywhere in the sector. The climate challenges blending with the societal problems we're facing today require creativity and imagination; they're neither unsolvable nor someone else's responsibility. We must view them as part of our jobs and apply our utmost energies to overcoming them.

We have the moral duty to apply the triple bottom line concept in our business that posits firms should commit to measuring their social and environmental impact—in addition to their financial performance—rather than solely focusing on generating profit, or the standard “bottom line.” It can be broken down into “three Ps”: profit, people, and the planet.

Agriculture, which today is a sector that significantly affects climate change, will have to clash with itself in the near future in order to be the locomotive which minimizes

the impact that climate change brings to the population and contribute catalytically to a better world.

Climate change is a reality that requires a new holistic design of the way of life and nutrition of societies and if you do not have billions to travel in space with Jeff Bezos or Elon Musk and then reside there, you better not observe but intervene and change problematic practices instead.

We have to adapt to huge changes, we are forced to radically change the way we grow land. The eyes of all future generations are upon us and will not let us get away with this. Right here, right now is where we draw the line whether we like it or not.



How will this be done?

**The word culture is contained
in the word agriculture.**

That's exactly where the solution is.

The Root and the Drone





The agri-food industry is facing unprecedented challenges that will not only permanently change the way we work but this time will change how we are, ourselves. Now it's the biggest transformation in the history of our sector and it can't happen overnight, our industry is forced to think now in decades rather than years.

Let's talk about new technologies in agriculture, and that's because many people are afraid of new technologies, they are actually afraid of any big change... How many times have we heard that "*robots will come and take our jobs?*" but is that the case in agriculture?

Think!

Could it be that instead of being seen as a threat to some in the market, the "machines" will probably upgrade the old practices of agriculture and they will impact positively in the quality of life for the farmers?

Will robots wipe out the cost disadvantages Europe has vis-à-vis other countries with much cheaper costs and especially its production costs by using cheaper labour force? Eg. in Europe, what is better for farmers to cope when they produce in different parts of Europe, but they sell their products to the same markets with cheaper -production wise- products from all over the world? Which is easier to compare? The cost of products have been produced in China in relation to their own labour cost or the cost of a robot in Europe versus the one of a robot that produces products in China? What is most beneficial for the European farmers?

While new technologies will perhaps pose a 'threat' to the status quo of other sectors, in our sector they will not only help to reduce the costs that will come from better use and analysis of data but will promote sustainable farming systems with environmental effects and benefits for the climate, natural resources and biodiversity; they will also help in what we name as wellbeing and better quality in our daily lives!

Might seems pellicular but unlike the other sectors they use artificial intelligence and technologies to move beyond and meet future challenges, agriculture is the only sector should apply massively the technologies to move back -allow me to say- to the greener practices of past two centuries, to the products with very little or w-o chemicals, to regenerative practices used to applied at small villages.

**After all,
what does sustainability mean?**





Sustainability means the attitude to meet the needs of the present without compromising the right of the new generations to meet exactly their needs in the future, even if needed to look back to the past to find innovations, although are always laying on the desk, have been forgotten somehow!

We have missed so many opportunities in recent years, as we are unable to compete on an increasingly unequal basis of competition, with increasingly intensive agriculture where small and medium-sized farms have almost completely been excluded from competition. But now, we cannot afford anymore downplaying the challenge of climate change based on the same perceptions we have and our ignorance. It is needed now to disrupt and not just maintain, policies which lead to improvements in efficiency or operational offsets are no longer the main narrative which inspires.

Given that agricultural conditions and structure differ from country to country, our approach must be flexible if we are to reverse the decline of small and medium-sized family farms and resume production and reintroduce them into the market. The new CAP, Farm2Fork or the Green Deal concept is attractive mainly for the application of new technologies and especially regarding ecological systems, such as precision agriculture.

But, as is the case with everything, for some, changes are not enough, and for others they go a long way. I understand that most farmers agree with the need for change,

but many are concerned about how these changes will affect livelihood.

I come from an agricultural background. I understand how hard farmers work to feed their families, feed society and take care of their land. But I also have a business background, and I'm used to hearing all sides of an argument and weighing up the evidence before me. So, we need to be smart and now work with intelligence and innovation.

To achieve our goals, we need to build on advances in innovation, technology and digital solutions – such as precision agriculture.

It is a fact that agriculture is not industry, land is not a factory, animals are not machines, and farmers are not racing drivers. Agriculture should not be a race to produce as much as possible and as intensively as possible, without considering the environmental consequence and without a decent income for you farmers.

Everyone must understand this very well: there are now three pillars of sustainability in the peasantry: social, environmental, and economic.

These three pillars are certainly separate but connected and we must work strategically to build each of these axes.

Strengthening the competitiveness of agriculture now by rapidly adopting and applying Ag-Technologies is a wrecking ball which will ensure on the one hand the sustainable management of natural resources, on the other hand the actions for climate change and volatility by achieving balanced territorial development of the rural communities.

Technologies such as Precision Agriculture on a large scale will not only encourage sustainability but will also lead to higher productivity and reduced inputs for farmers, thus significantly reducing costs among many other advantages that will be achieved as between these stand the creation and maintenance of jobs at long term.

Innovation and entrepreneurship, the response to the rural crisis





Stay Curious!

Promoting innovation by supporting agricultural research and disseminating new ideas will improve the overall productivity of the sector instead of simply redistributing jobs from other sectors of the economy.

What should the new CAP include in order to attract young farmers back to agriculture? The introduction of new technologies could contribute to this direction;

In 2012, writers Petrick and Zier concluded that €1 million in investment aid was needed. to create 20 jobs in the short term and 83 jobs in the long term. In general, sub-

sidizing employment and youth employment in low-productivity agriculture in particular is neither a sensible nor a sustainable job creation strategy.

Promoting innovation through support for agricultural research and disseminating new ideas through knowledge-sharing networks and operational groups is one of the directions that will improve the overall productivity of the sector instead of simply redistributing jobs from other sectors of the economy. They will help young farmers in particular who are more familiar with new technologies to overcome specific obstacles to improve their productivity, rather than only relying on generalised income support from subsidies, which may not have a positive impact on the employment of young farmers.

In my opinion, the global challenges to achieving food sufficiency in the coming decades will be based on the 'as much as' philosophy. I therefore believe that there are two pillars that should be promoted with the new CAP if we are to follow this direction while attracting young people to the agricultural sector.

The first concerns the strengthening of youth entrepreneurship and the second concerns cutting-edge technologies such as, for example, precision agriculture.

Both pillars are very close to the perception of young farmers and agronomists, that is, those who will be called upon to work together in the coming years.

I have personally participated in programs for precision agriculture and the development of youth entrepreneurship (start-ups) in various fields in which I operate. I also encourage the groups I'm trying to influence to do the same.

How the Commission's proposed biofuels strategy affect farmers in Eastern and South-Eastern Europe, given that the first generation of biofuels is being phased out by 2030?

Approaching the end of the decade, the current EU strategy requiring each member state to use in transport fuels that come at least 10% from renewable energy sources does not seem to be easily achieved.

Biofuels today are a key component of this equation and from 2020 onwards the future of growing plants for fuel production will suffer a similar reduction as the Commission – although heavily criticised – has decided to put in place its plans to phase out conventional biofuels by 2030. Nevertheless, it seems that the industry will be able to react as biofuels continue to preoccupy states and businesses.

In terms of origin, biofuels based on crops whose fruits produce food (or animal food) will be driven to a dramatic decline with bioethanol-producing crops, such as maize, being hit the hardest. This is because the argument "*we take food out of people's mouths to fuel their cars*" has a particular potential now in the EU. However, the repeal provisions in the proposed European legislation actually warn European producers and investors that first-generation biofuels are being phased out and raise concerns about jobs that could be affected by a horizontal abolition between 2020 and 2025.

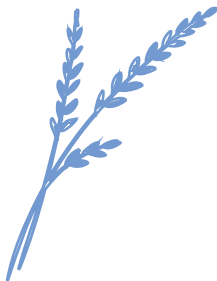
The decision to phase out the production rate after 2020 certainly offers greater opportunities for companies involved in managing not only fruits but also crop residues, and this change in the status quo will be an important business opportunity for non-EU Member States and especially for the Black Sea region.

A strong community of innovative actors of the sector with a long term commitment and innovative thinking who shape their activities around intentional interaction, dialogue and inquiry will be the corner stone for the development of the eco-food sector if they will be supported and empowered within national & regional strategies which aim to a holistic and sustainable agriculture.

Each planned initiative aligned to the aforesaid vision should be rooted in personal incentives and shared ownership to tasks because, the intensity and ecology of the shared views will build the carrying capacity and structure of the innovation culture.

Harmonised concepts balanced between institutional entrepreneurship, market entrepreneurship and cultural entrepreneurship are among the passwords for unlocking a tremendous potential that sector holds. Thereby, by blending regional innovation strategies within the eco-food sector we will build strategies on the activity of pioneering cultures of practice and we will facilitate also accelerate a broader entwining of institutional, market and cultural leadership.

Then, a corresponding strategy and action plan should be developed to acknowledge, build on and strengthen the culture of strength embedded in the rural communities.



I WANT TO PUT IT AGAIN BLUNTLY
———— THAT ————
NO INNOVATION OR STRATEGY
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INCREASE TO THE MAXIMUM HIS
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CONTRIBUTION AND HIS WELLBEING.

Walk the Talk





Q. Do you disrupt doing business or just chase market trends?

The challenges of agriculture blending with the societal problems we're facing today require creativity and imagination; they're neither unsolvable nor someone else's responsibility. We must view them as part of our jobs and apply our utmost energies to overcoming them. Operational offsets and improvements in efficiency are no longer the main narrative which inspires. Our market goes beyond counting leafspots and bugs, goes towards

prevention, environmentally friendly approaches, out of the box practices. This is the best timing for fundamental changes in the way we do business.

The business today is not thriving by only claiming optimistic mantras which often are not falling to the bottom line but 'to walk the talk' in line with disruptive initiatives i.e., to dare connecting our industry with entire food chain it's a disruption for me which overcomes the historic reluctance of the sector to work together outside of its traditional approach.

To be disruptive you should always remember your role: how we solve the global food crisis, and how we help agriculture to transform and become part of the solution to climate change. To do this, we must learn from conventional and organic methods and go beyond them, by applying practices that regenerate soils, increase productivity with less inputs, capture carbon in the soils, become digital and circular. All at the same time and this won't happen in a vacuum, this takes time thus the industry should think for decades, not for years...

I'm convinced that we should not just kick the can down the road when we are doing business nowadays but to aim ripping up the rule book. We should be among the generation who do not just chasing trends or arrive too late in the market. We should provide to our partners new ideas and business models to answer today's challenges therefore to turn uncertainty and volatility into vision. This is disruption to me, if not, we will be disrupted!

Q. *Regenerative agriculture? Bio stimulants or bio-smokescreen?*

Dubbed “beyond sustainable,” regenerative agricultural methodologies seek, indeed, to add to the soil through a self-nourishing ecological system that benefits the environment in the process.

To make it simple: Bio-products are usually less toxic than conventional applications. This is the reason for increasing popularity of bio-based solutions and the awareness among farmers and consumers is likely to drive the market to grow significantly.

Moreover, in a market characterized by rapid change, yesterday's paradigms risk & embedded conventional practices becoming redundant or even harmful. Strategies to speed adoption of bio-based approaches should be accelerated.

Speaking for our case, by full engagement we seriously affirm our commitment to bio-direction, to bio-service in general by housing innovative product portfolios and registrations to be recognised as catalysts for the bio-solutions around the globe.

So far, the industry's contribution towards bio-direction, is at its best, uncountable, lacking clear and harmonized benchmarks and indicators, and robust third-party verification. But this is an opportunity for the near future: we must build momentum fighting the worsening climate crisis.

In nutshell, whatever differences remain among actors in the segment, all stand to benefit from working together to make a 'real impact' for a sustainable and regenerative food system from now on! At the end, global food security is strongly determined by crop production so, we need to pivot!

For all these reasons, allow me to take the risk to foresee another perspective about the future of bio stimulants and biocontrol segments:

From a niche focuses on a small group of farmers nowadays in very few years it will rapidly become the 'status quo' by capturing an unexpectedly important market share!. This development, apart from the power and glory that go with such dominance for the leaders, will also mean enjoying the highest profits & well-being of the actors serving this market in all layers. This development, in my view, won't be about throwing a net into the ocean and hoping to get a lot of the fish, instead, will be a revolutionary shift for the sector.

Q. Sustainability or just business as usual and profit?

Changing structures, application behaviours and the greater reliance of farmers on difficulties poses a number of challenges for maintaining good food practices. Yet, it is not wholly clear whether we are climbing out of a hole

or digging ourselves deeper... Therefore, the question is: does today's agriculture contribute to the magnitude of the challenge or at the same time it is a victim of a perverse strategy and of bad publicity that only focusing on the profit? Until now, environmental responsibility in the food system often pits producers and farmers against each other, this goes the story...

Over the next years, crop production -especially the demand for very qualitative food - will increase significantly to meet the needs of a rising human population. This must be done w-o damaging the environment and the local ecosystem.

We have to piercingly understand that the farmer not only produces food, but he is also the main administrator of the environment and of good environmental practices.

The agriculture of tomorrow, supported by new technologies and policies, is expected to ensure the adjustments needed to avoid harming agricultural production and to contribute decisively to the sustainability.

On the other hand, amid increasing consumer demand for transparency and a multitude of labels and initiatives, it can be hard to define what's truly sustainable in the global agricultural system. By basic definition, sustainable food systems do not take away from the soil or environment. They seek to maintain Earth's natural resources and the idea is to create farm systems that work in harmony with nature to improve quality of life for every creature involved.

So, the power lies in the sector. Our role is to control how qualitative food is grown and distributed around the world also our collective goal should be to provide enough healthy, safe and affordable food while solving climate change for generations to come.

Therefore, we have the moral duty to apply the triple bottom line concept in our business that posits firms to commit to measuring their social and environmental impact—in addition to their financial performance—rather than solely focusing on generating profit, or the standard “bottom line” but broken down into “three Ps” instead: profit, people, and the planet.

After all, what sustainability does really mean? Sustainability means meeting the needs of the present without compromising the same needs of the future generation. You should not jeopardize or undermine their rights to meet their own needs!

Q. Go digital or not to support good agricultural practices?

While the demand of the food will be raised significantly at the globe, the agricultural sector will be hit hard, as the food inflation, the rising inputs costs and widespread shortages will force many farmers to scale back, we will have smaller harvests, and this would drive up food prices around the world. Digital agriculture has the power to transform life -especially- for smallholder farmers around the globe, can help these small farmers surmount above challenges, increasing their productivity and integration into food value chains and supporting their adoption of climate-smart practices.

So, why digital agriculture has not yet lived up to its potential? What is holding digital ag efforts back? There are several reasons i.e. too many start-ups try to roll out solutions in locations where the ecosystem is not mature enough to support it, digital ecosystem's inability to explain the added-value and impact for farmers, innovation isn't enough, market matters because still remains fragmented and inefficient etc.

But, the digitization of agricultural activity, despite is slow so far, has great benefits and a transformation in farmers' mentality is needed given the external risks that affect crop production (volatile crop prices, water shortages, climate change etc.). Go digital, in my opinion, will also narrow or even eliminate the gaps at labour and production costs from country to country and those who can go one step further will be able to continue achieve profitability and maintain the viability of their firms and farms.

It's simple and plane on our table: digital technologies are used to optimize key components of food systems, increasing productivity and profitability, while reducing environmental impacts. The digital agricultural revolution will provide new means and methods for farmers

to further optimize management of resources, improve crop quality and quantity, and remain productive in a changing & challenging distribution model and world.

All players must work together to support digital agricultural development. We need all hands on deck to transform practices and mindset in supporting a transition that advance the development of the agriculture market. When that happens, the benefits of digital agriculture will become a reality.

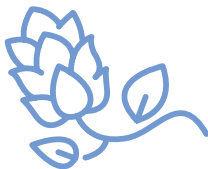
Q. What's your drive to go beyond?

The more divided the world becomes, the more we need culturally and emotionally intelligent leaders able to build bridges of understanding and navigate the complexities of the increasingly role of Agri-Food industry within a polarized world of climate change.

Literally, I depend on my own paddle. I like to play against type and I'm not just watching from the side-lines. Acknowledge of the challenge and act by optimising to its

peak, the social responsibility of individuals who are in the sector will maximise lifespan and peace of mind in the long run. I do the same, I act such as.

The mantra I say to my teams is that it's not about why -and if- we are better from this or the other competitor. But what is it we stand for! Where we fit in this world, in this market and how we will be better and even more 'future-fit' individuals and companies. At the end, our legacy would be determined by our successors and especially by the footprint which will be left to the new generation, the new entrants in the sector. You agree I suppose that we should not hand on them the keys to a 'house' that immediately caught fire... I want to be part of the Game-Changers; this is my drive, passion, and hunger!



Companies
VS.
Countries
VS.
Crisis
VS.
Culture





In Europe we are victims of our own well-being and our main fear is for survival and we are trying to compromise in every way to achieve it, we are in a passive state and we have made desires a necessity and a reality.

But what happens when an organization that operates globally, is dealing with unexpected and violent events e.g. a war, a sudden embargo, etc. that have a completely conflicting impact on the countries involved and affect negatively the interests, the culture and ultimately hinder either temporarily or permanently the business in the respective areas;

In our work and in our society we live and work together with many different nationalities, including employees and families that may be involved in any mentioned conflict. The same thing happens in the market where we may talk to partners or compete with people who have found themselves involuntarily in the "eye of the hurricane" and may be affected by the situation that has been suddenly created. For instance given the invasion of Russia in Ukraine lately, I believe that all companies should analyse in depth and from scratch the consequences for their business's footprint and re-position themselves, especially to the symbolic message they want to convey to the market and, responsibly to the society in general.



**What does this mean
for the business actors
in the sector?**

IN SUCH A CRISIS, THE CONSEQUENCES FOR THE BUSINESS IN THE AGRO SEGMENT ARE SOUND AND CLEAR:

-  Many suppliers of raw material will enter into a state of emergency suspending further supply commitments and that means that everybody will review product prices and availabilities.
-  The whole supply chain will probably react -as it happened in similar cases in the past- by increasing also by anticipating prices and will try to benefit from the shortages and unplanned demand.
-  The commodity crops in stock exchange will react as well and all the major indicators will be all up. The agricultural sector will be hit hard, as the interconnected global supply chains are sensitive to even small disruptions imagine when the crisis hits important regions. In our case, Ukraine is a massive exporter of cereals and oil crops, same for Russia as well.
-  In the agriculture industry there will also be long term consequences. Food inflation will accelerate signifi-

cantly with fresh price shocks stemming from increased energy costs, seizures of agricultural areas, and the sweeping economic sanctions promised by other governments. In the mentioned war for example, the threat of the Western World to increase sanctions will put more oil and other materials into the fire.



Rising fertilizer costs and widespread shortages would force many farmers to scale back and market will drop. The resulting smaller harvests would drive up food prices around the world at a time when global food shortages already pose serious challenges such as increasing risks of famine and mass migration.

Considering all above factors of emergency, what the main players do is that they usually hold on selling commitments, suspend or install open quotations, reset their pricing policy, decline 'out of ordinary' requests from non-traditional customers or they over-price such demands by benefited from their existing stocks until they obtain better visibility while they re-directed products to other –than the conflicting- areas for not losing business or minimizing losses.

To remain patient until you have studied better what exactly strategy to place and obtain better visibility is the key in a situation like this.




Defining the way of working within the many constraints (e.g. resources, time, etc.) may, in fact, represent the most common manifestation of top innovation. In the agencies, however, expediency is not just a matter of dealing with the constraints. Leaders should also pay attention to the possible negative consequences of a solution in relation to other ongoing problem-solving efforts and broader system objectives. Solutions that are inconsistent with broader objectives and policies or solutions related to negative consequences must be rejected as unworkable.

At a time when international geopolitics pits two countries against each other, we must prevent any opportunistic image from being transferred to our teams, to the clients, to competitors or to any layer and group related to our operations.

The impact of the stories and images that appear in the media, which are added to the reality experienced by some families around us, can affect the mood and rela-

tionships between colleagues, and our job is to provide the means to minimize that impact.

The conflict can be developed in many ways and our responsibility is that we have to deal with the situation in the following way:

-  Providing emotional and psychological support to those who need it.
-  Avoiding personal opinions and spreading rumors.
-  Not with defensive behaviour by passing to the back and point fingers. Not just watching without cauterizing the negative and biased comments towards competitors and individuals who might belong to these nationalities or –being enterprises of a global group- have the origin and interests in that areas.

Our professional ecosystem should always be and will always be a "protected place" so that all employees feel emotional and psychological security and behave accordingly in difficult circumstances such as those we experience from time to time. This model of behaviour must be conveyed both to the market and to our customers and to our competitors if we are called upon to express an opinion.

I fully understand that "temperature" in the market can go up quite quickly, our customers want us to know our clear position in such situations and we must do so clearly but without the involvement of others, without any reference to any competitors and without involving customers in endless and counterproductive discussions to take a stand.

I fully understand that in many cases we cannot simply say that we are not countries but we are only companies that do our job but it is more important to avoid and 'block' the negative criticism of competing products and companies.

It is important as a precaution to stop any attitude of negative opinions about others in the market in order to avoid possible tensions that lead to a more difficult situation and I am convinced that this, regardless of temporary and opportunistic profits, is the only ethical attitude that in the long term will gain understanding and agreement from all partners.

Those who follow closely the combination of sanctions and the reaction of the markets, find that the energy crisis that is manifesting itself will soon turn into a food crisis.

The effects of war act as communicating vessels. Even in the Western world, where we belong, there will be a shortage of food and what is there will become more expensive. Nor is there any mention of the Third World, where shortages will create problems of survival. That is why action is needed now, information and organization.

Environmental changes, subsystem differences, and the diversity of human beings result in organizational frameworks defined by complexity, conflict, and dynamism. In these circumstances, the ultimate goals and paths to achieving the goal are, at best, uncertain. To survive and prosper, organizations need to control conflicts, position themselves to adapt to change, and choose the best paths to achieve the goal. Accordingly, the leaders of the organization in charge of maintaining organizational sustainability must look for new goals and paths to achieve the goals of the organization for its maintenance and ensure that the work is completed.

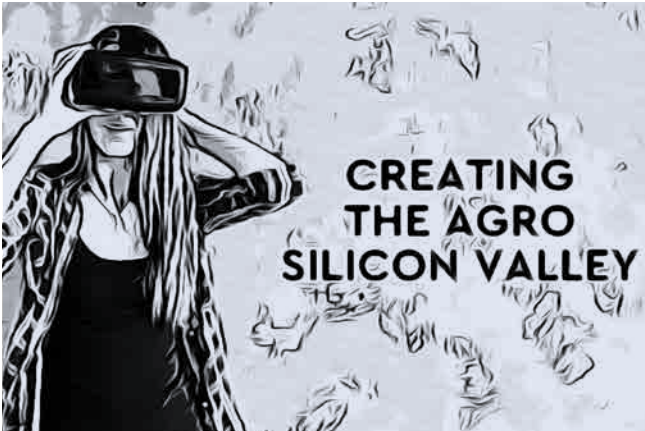
Thus, a leader's performance is a function of whether he can identify goals, create sustainable goal paths, and direct others on those paths in an unstable, changing socio-technical environment

On the other hand, it is paramount that all employees in a company should work together closely and that keep cool heads when a crisis hits.

THE MEANING OF LIFE IS NOT
JUST SURVIVAL, THE PURPOSE
OF SURVIVAL IT IS ONLY
SURVIVAL AND NOTHING ELSE.
WE MUST ACCEPT THAT WE HAVE
DEFUNCT OTHER, GREAT VALUES
AND AWAKEN TO LIBERATE
THIS VALUE SYSTEM AND TAKE
RESPONSIBILITY FOR IT.

Creating the Agro Silicon Valley





HOW TO CREATE THE GREEK AGRO-SILICON VALLEY

The first thing we need to do in Greece is to grow up! Not in production volumes or in areas, but we need to mature in our way of thinking. We need to stop behaving like children who blame the others for everything. Yet, we need to admit that Greek Agriculture has great potential for development. The quality of raw materials and the biodiversity are sufficient advantages, but are not enough. We need to make a scale up, which means

to develop partnerships, where many small farmers will cooperate, to be able to meet the need of the consumer.

In the meanwhile, we need to focus in our "strong" products, i.e. as olive crop e.tc. and create a "Greek basket" for the export markets.



Since we are not able to control the distribution channels, we need to back up our food products with marketing, branding, new technologies linked to the Greek history and the tourism. This is a powerful strategic "triangle" of steady growth.

I have mentioned several times the need to create a **“rural Silicon Valley”**. That is, to create an appropriate environment, for open minded people with innovative ideas and provide them not only with the necessary capital support, but also to give them the independence and the time needed to generate new business models in technology, innovation, marketing and distribution.

From my point of view, our target is to become in the best possible way, the high-end of the qualitative European market, by connecting small farmers with the markets and creating added value for the products we produce.

- Without solid structure you cannot be even noticed in the export markets.
- Just selling bulk products without added value but only based on cost plus models and apply prices without explaining and justifying differentiation and the advanced quality to the distribution channels, will lead us to permanent stagnation.

THE ONLY EXCEPTION WILL BE SOME PIONEER BUSINESSMEN, WHO ALONE, WITHOUT HELP AND WITH GREAT OBSTACLES TO FACE, MANAGE NOT ONLY TO EVOLVE AND THRIVE, BUT MAINLY DUE TO THEIR EXTROVERSION, THEIR PASSION, THE INSISTENCE AND THEIR PATIENCE, TAKE IT A STEP FORWARD AND LEAVE THEIR OWN SIGNATURE, THEIR OWN TRACE AND FOOTPRINT.

WE COME AND GO TO LIFE ALONE

NFT



This has been a year with its high highs and low lows, it's been a strange disorienting but also creative experience for me, a real discovery!

It is well known that building a personal attitude not only to surviving but thriving over very challenging times has a lot to do with skills, vision, resources, action plan, health and excellent personal shape.

Coping with big difficulties without stepping back of your personal path and consciously or unconsciously selected orientation, while psychology, self-confidence and adaptation are usually underappreciated and rarely gets high attention, yet they are the most important part of building a winning behaviour, to distinguish signals from noise, to navigate in difficult times and motivate others (and yourself) to follow.

This year definitely had high highs, but the highs are quite easy for anyone to deal with: you have a special dinner, you dance, you drink few glasses

of wine that specific night, you celebrate the success with your team, share the victories with your friends and life partner, you recall a memorable trip with your family, you are motivated by a new creative project that has been developed by you etc.

What's harder to deal with are the lows, but I'm talking about the 'real lows', when important situations and things don't work out as you expect them to. Examples include friends and relatives passing away, having an important colleague resign, a prominent project which would positively have impacted the life of many failed at the last minute, an unwelcome family situation was not expected but occurred, experiencing financial stress through a shortage of money while you were ready to buy your dreamed home, a competitor winning a big partnership deal at your expense because of your inertia and dilatoriness etc.

Some of these have happened to me at some point in the last year. And the only way through all the shit which I discovered and want to share with you is to make sure you talk honestly (and not necessarily out loud) to yourself every day -and-in the right way by continuously feeding your inspiration and rationale to move forward.

There are also certain ways you can look at problems to quickly figure out if they're potential "destroyers" of your personal path or if they're mirrored opportunities to discover your untapped potential, your hidden talent, a late discovered life's shift & path forward, or just bumps along the way which should be solved without essentially harming or deeply frustrating you but rather welcoming these moments.

Likewise, in my case, most lows I feared never materialized, but the thing is that instead of shaping an alternative approach to look only at things objectively and problems rationally by generating

solutions. I wasted much time stressing over the "what ifs" which didn't help get the negative thoughts out of my head quickly.

But, what's the worst thing that can happen if someone fails? Suppose your personal plans don't come to fruition. What's really the worst thing that can happen? You have to start again? So what!

Your lifestyle takes a bit of a hit?

So what!

Your pride gets crushed?

So what!

You lost money?

That's hard to see, and you might come close to a bump but your wheels rarely, if ever, fall off!

The odds of everything falling apart are so small that most times it's not even worth considering. Step back, be aware of how you feel and do whatever it takes to manage your own psychology—because in the end that's really all that matters.

I discovered that one key to maturing as a personality especially within big personal difficulties is to know when you're just not up to working as you normally would if you want to catch the next wave of evolution and adapt your professional style to a new normal which is impossible to sidestep or deny. When this feeling comes, it's best to tune in to your thoughts and feelings, don't fight it and do not spend too much time thinking about what other's do, this will run you into the ground.

Better go out from your 'regularly' and continues to make progress in the same or in other areas without fear, this was my lesson. What's the one thing you do that excites the hell out of you? It could be exercise, horse-riding, painting,

public speaking, helping someone, writing a book, volunteering, video games, on line self-confidence seminars, travelling, gardening, cooking, photography or design lessons.

Whatever it is, do it regularly to top up your dopamine levels. If you don't have a vice, spend some time to find one. Try a lot of new things and keep the ones that make you come alive.

My point is that while you might struggle to execute your vision, recognising the importance of your unlimited personal development to cope with all difficulties is not only a must of survival but opportunity for self-improvement which cannot be neglected.

We should understand that now we open our eyes to a world very different from what we know, this is not the world we had lived, nothing is the same. I understand if we are vulnerable and terrified due to this.

Who am I in the new environment?

What choices should I make to avoid being disproved?

Who will give me the answer?

But now we owe it to ourselves to make the big decisions. Many people care about giving you their opinion but the right person is yourself. So many people in our lives, but everyone is passing by, because that's what people do. The only constant in the equation is yourself, he works tirelessly and always underground under our skin, at the core of our being, where we guard him.

So we need to take care of ourselves and love our existence.

- > Do not be forced into situations that oppress you.
- > Don't impose on the people who don't deserve it.
- > Do not kill your dreams, don't hold yourself back to where you have all the potential to go forward.

Only in this way will we feel happy, only in this way will we be grateful and this will be done outwardly. Otherwise we will always experience a permanent internal conflict that spoils everything in our daily lives, no matter how big or small and we will pass on our anger and responsibility to others, we will be unable to concentrate on our goals and we will ultimately blame even the first person in the queue for breathing.

Very important: Do not forget to express your gratitude and honour those who trusted you and especially those who based their dreams on your support and guidance.

For us we are operating in the Agro-food industry we have to admit & appreciate how blessed we are for being in a fast-growing segment of the agriculture input market, and among highly attractive business opportunities which will have a long lasting benefit for all actors are performing in Agro-industry.

But most of all, don't forget to thank those who tried in vain and will continue trying to inhibit you and put obstacles in the way of what you stand for and what you create.

All they manage is simply to help you mobilise to be more creative, to discover even more your new limits, your inexhaustible power and your love for what you do.

Hey, do you listen?
We come and go to life alone.

**The Future
Of Obvious Disruption**