









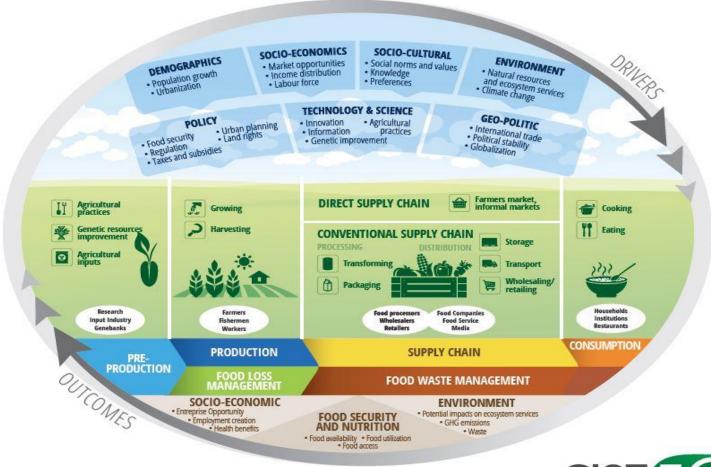
Agriculture: part of a food system

- Agriculture is part of a food system
- Challenges in agriculture affect the whole food system and vice versa: problems in other system parts affect agriculture
- Acknowledging interdependencies: an action in one part will affect other parts, sometimes unexpectedly
- Siloed policies and governance fail to acknowledge interactions and interdependencies in the system
- The Finnish food system is connected to European and global food systems



THE FOOD SYSTEM

DRIVERS ACTIVITIES ACTORS OUTCOMES



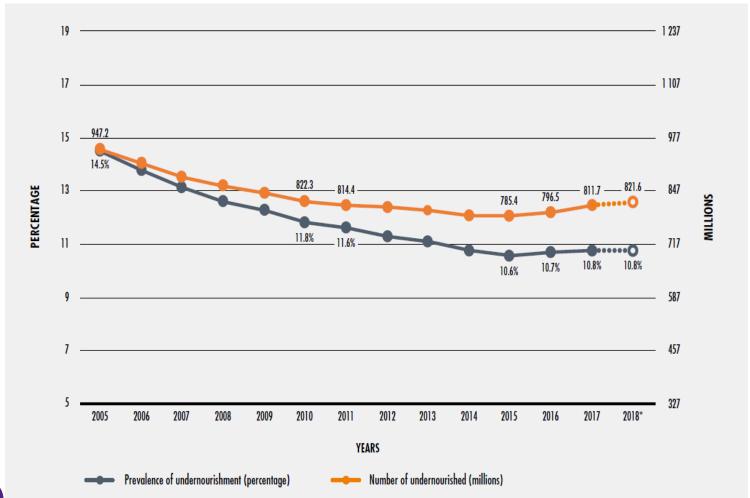


Food security and food system

One of the outcomes of a well-functioning food system is food and nutrition security that is achieved with minimal negative environmental impact



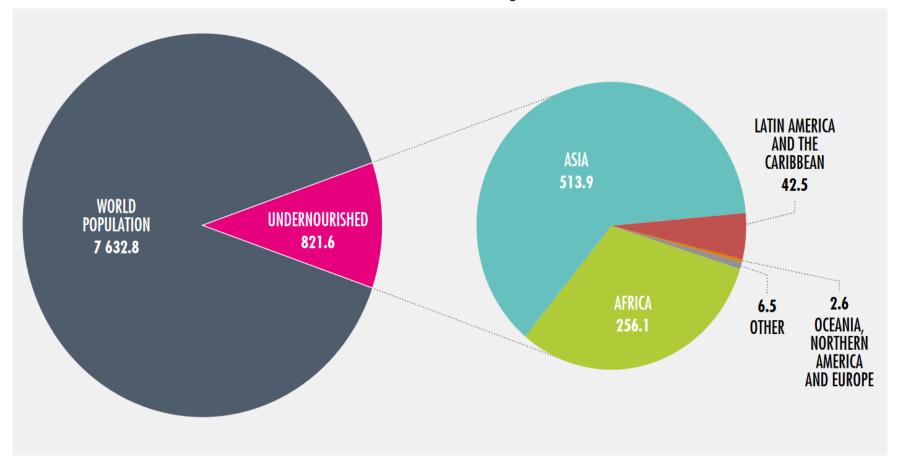
Undernourishment on the rise





Source: SOFI 2019

Undernourishment in the World 2018 (in million)





Source: SOFI 2019

Many faces of malnutrition





Source: The Global Nutrition Report 2018

Why are nutrition problems increasing?

Climate variability and extremes

Photos: FAO et al.



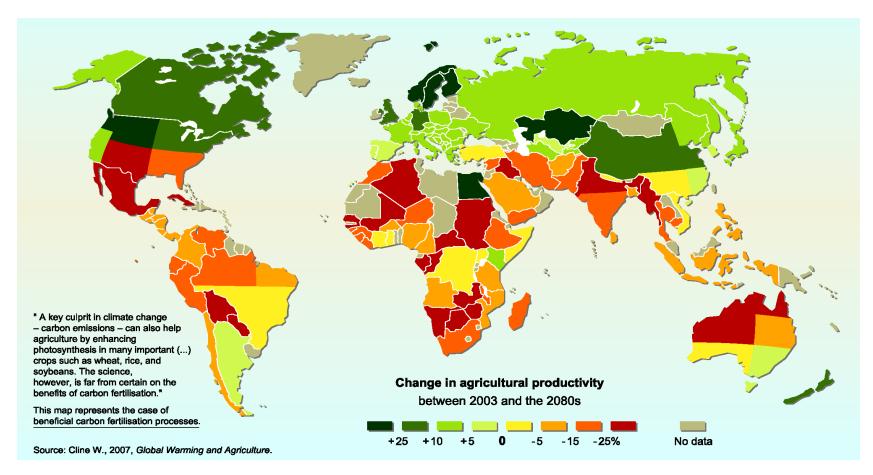
Disasters related to climate extremes



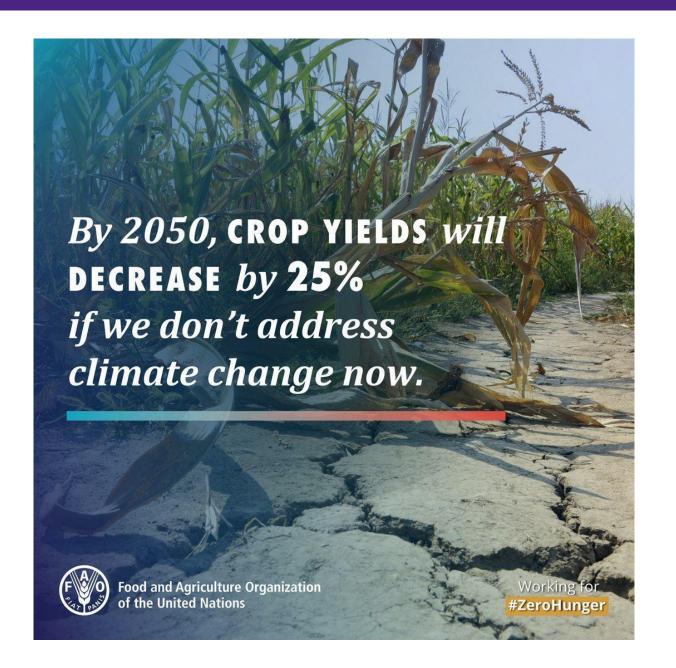




Global: Projected climate change impact on agricultural yields

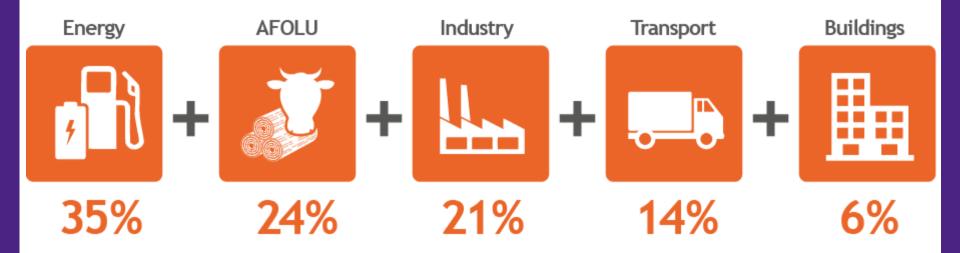








Global: Emissions by sector



FAO 2015 (originally IPCC)



Global: Agrobiodiversity under threat

- More than 6 000 plant species have been cultivated for food on Earth
- Today, fewer than **200** contribute to food production globally, regionally or nationally
- Only **9** account for 66% of total crop production









Global: Centralisation, concentration

INPUTS |

TRADING

PROCESSING

DISTRIBUTING

50%

90%

\$1.1_{bn}

40%

SEEDS

3 companies control 50% of the market: ChemChina/ Syngenta, Bayer/Monsanto, Dow Chemical/Dupont TRADERS

4 major traders control as much as 90% of the global grain trade: Bunge, Archer Daniels Midland, Cargill, Louis Dreyfus. FOOD & BEVERAGES

10 companies own the biggest product brands and manufacture most of consumer shopping carts, collectively generating revenues of more than \$1.1bn a day: Associated British Foods, Coca-Cola, Danone, General Mills, Kellogg's, Mars, Mondelez International, Nestlé, PepsiCo, Unilever

RETAILERS

10 retailers share 40% in worldwide sales. In most OECD economies, one retailer controls between 15-30% of national supermarket sales: Tesco (UK), Carrefour (France), WalMart (USA), Edeka (Germany).

68%

AGROCHEMICALS

4 companies share 68% of the agrochemical market and 75% of the global pesticides market: ChemChina/ Syngenta, Bayer/Monsanto, Dow Chemical/Dupont, BASF

Bailey, B. 2017 Hoffman Centre



Challenges in the (Finnish) food system

- Low agricultural profitability

- Nutritional issues: overweight, obesity

- Environmental sustainability

- Food loss and waste

- Some people dependent on food aid

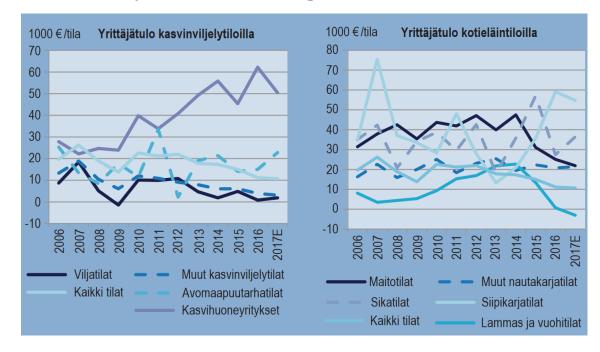
Concentration of power & decision making





Finland: Low profitability of agriculture

- During the past 15 years, agricultural productivity increased substantially, whereas profitability declined
- Input costs (fertilizer, machinery, land) increasing
- Farmers' share of food retail prices declining
- Weather-related losses
- Number of farms declining, farm size increasing





Finland: Overweight and obesity

In 2017, 26 % of men and 28 % of women were obese

Main challenges in diets:

- -not enough veggies, fruits and berries (differences btw men and women)
- -men eat too much red meat compared to recommendations
- -fat intake higher than recommended
- -inadequate intake of fibre



Source: THL FinRavinto

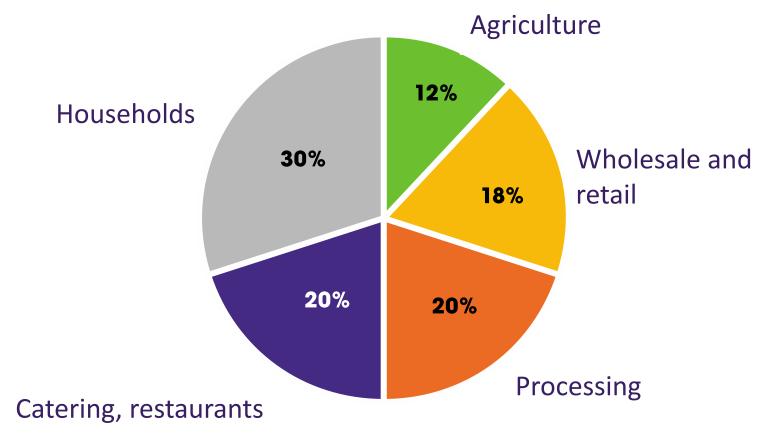
Finland: Environmental concerns

- Nutrient management: eutrophication of lakes and the Baltic Sea
- Soil erosion
- Climate change:adaptation and mitigation
- (Agro)biodiversity
- Food loss and waste





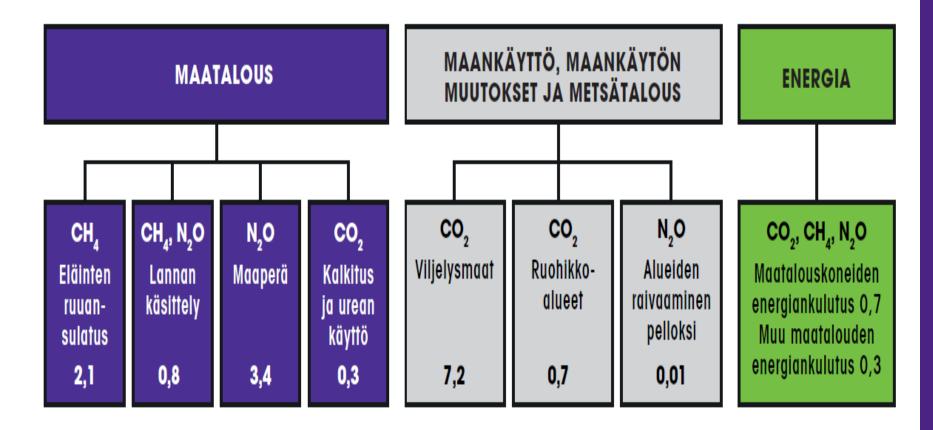
Finland: Food loss and waste 400 mill kg/year





Source: Luke

Finland: Climate change mitigation in agriculture





Source: Tilastokeskus

Finland: Climate change adaptation needs

Climate variability and extremes

Diseases and pests

Weeds

Variation of yields

Winter conditions

Frost

Need for irrigation

Luke 2017



10.9.2019

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Fairness of the food system

- Access to nutritious food constrained from many
- In Finland, tens of thousands of people partly dependent on food aid, globally hundreds of millions
- For these people, food price matters. But price matters also to producers who cannot cover their production costs.



- The physical distance between producers and consumers is growing. Only few can participate in decision making - concentration of power.



Finland's role?



Finland vs. EU vs. World

	Finland	EU	World
Population	5.5 million	510 million	7 600 million
Agricultural land	2.2 mill ha	175 mill ha	1 500 mill ha
Agricultural land/capita	0.40 ha	0.34 ha	0.20 ha
Cereal production	3.7 mill tn	317 mill tn	2 400 mill tn
Milk production	2.3 mill tn	168 mill tn	747 mill tn



Source: Karttunen 2018

Finnish food

- 78-80% of our food consumption from Finnish origin (Luke)
- High dependence on imported inputs
- A major environmental impact outside our borders: outsourcing water and land use, displacing biodiversity loss and GHG emissions
- Production practices under or beyond our control
- Short-term food security achievable by importing, in longer term several risks may materialize
- We need a responsible, fair and sustainable food system (see Twitter @justfood_stn)





