

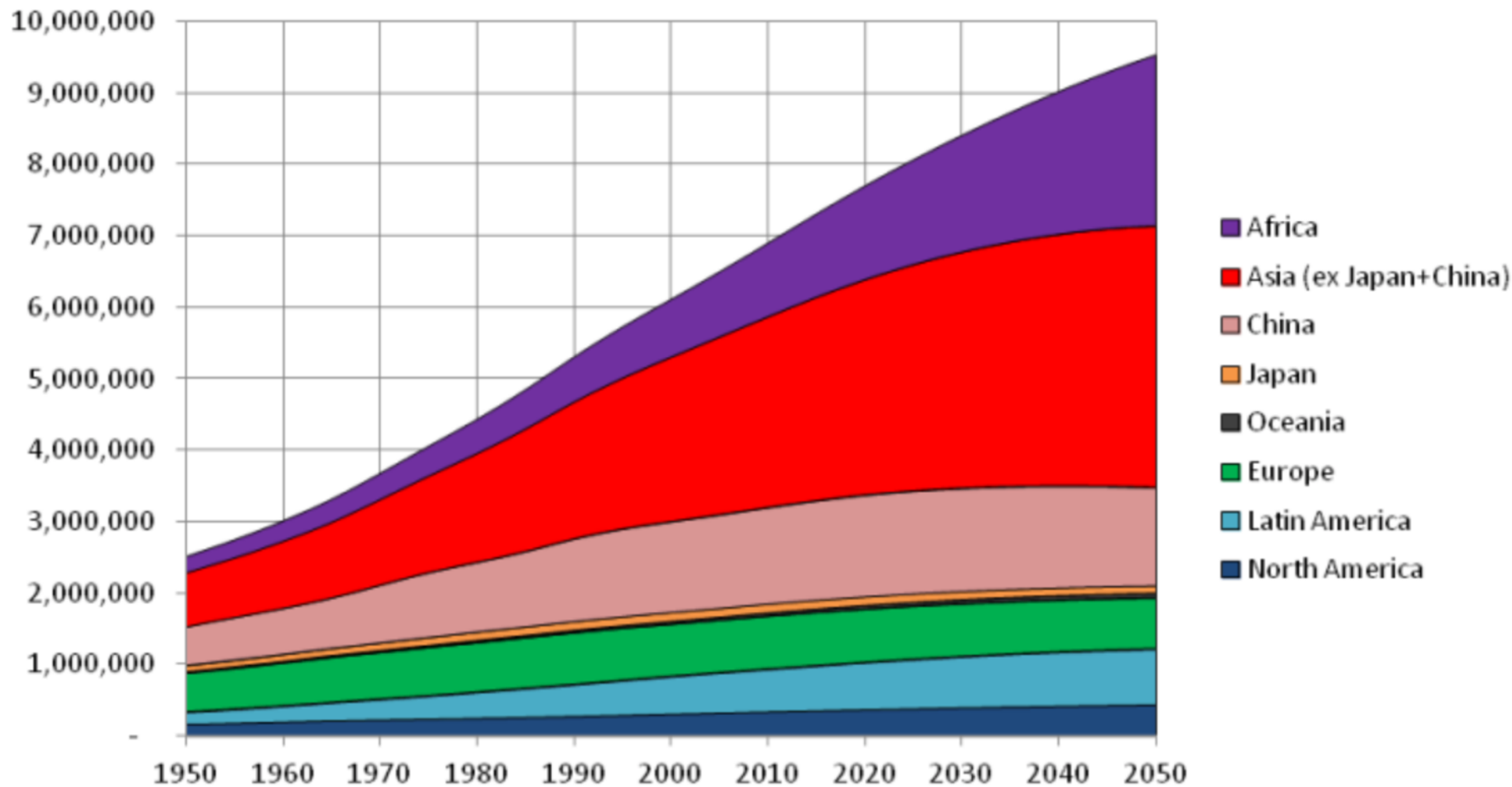
Changing trends from the field in Scottish arable crops



Heading for 10 Billion by 2050!

World Population

Source: UN



We're Adding 2 Billion By 2050. Evenly Spread?

Africa population to double

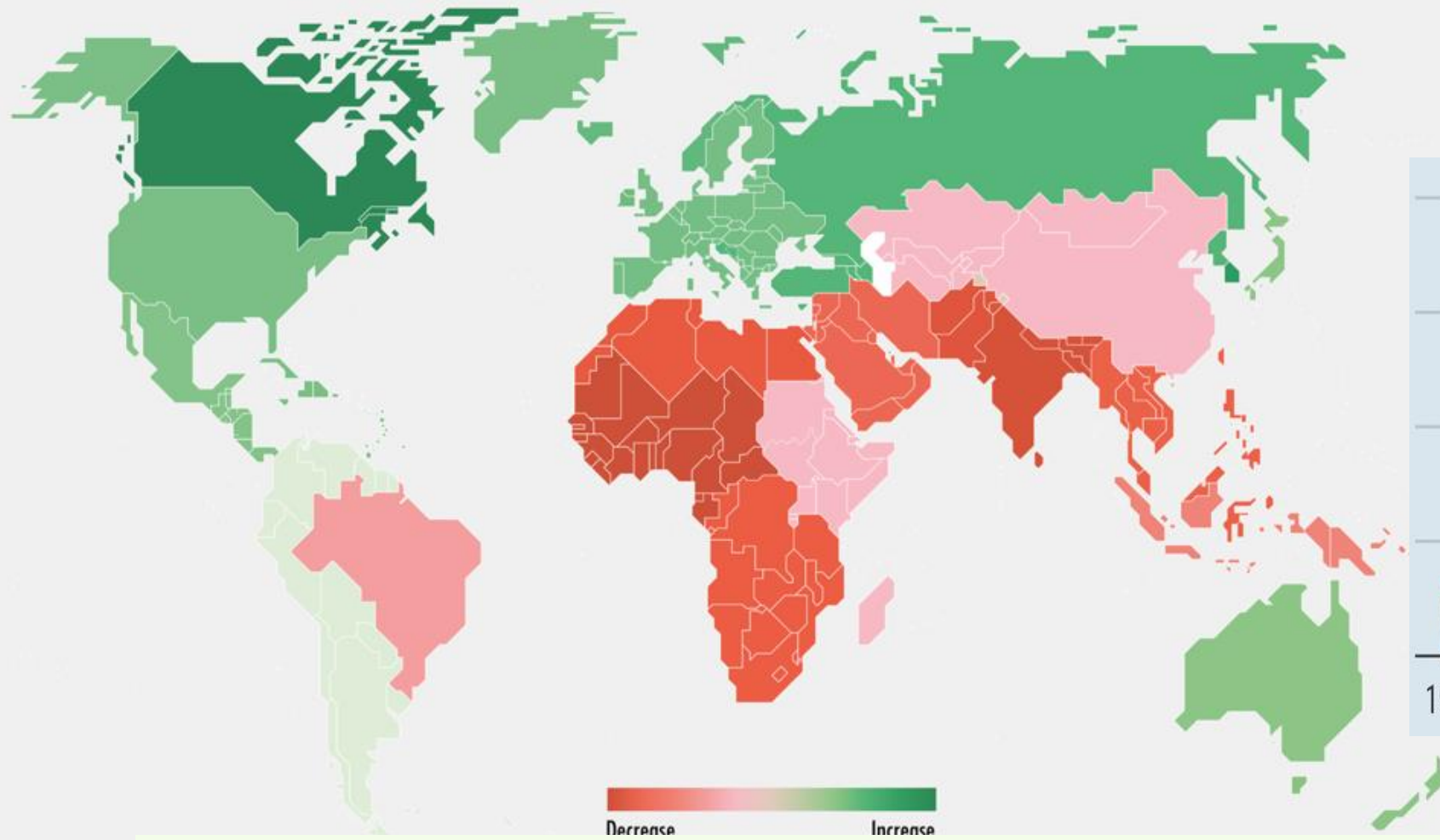
1.5 Bn. Hindu or Muslim

Africa & Asia pop. by far the majority in 2030

USCM pop. to increase by 100+ Million by 2050 whereas (EU incl. UK) to decline by 20 Million

Population of UK 2019? What about in 2050?

CHANGES IN AGRICULTURAL PRODUCTION IN 2050: CLIMATE CHANGE RELATIVE TO THE BASELINE



Most of the World's Mega-Cities Are Close to Sea. VERY Precarious For Communities Living on Deltas (e.g. in Bangladesh)

Average Global Sea Level Rise (cm)



In "The Economist" magazine, August 17th, 2019

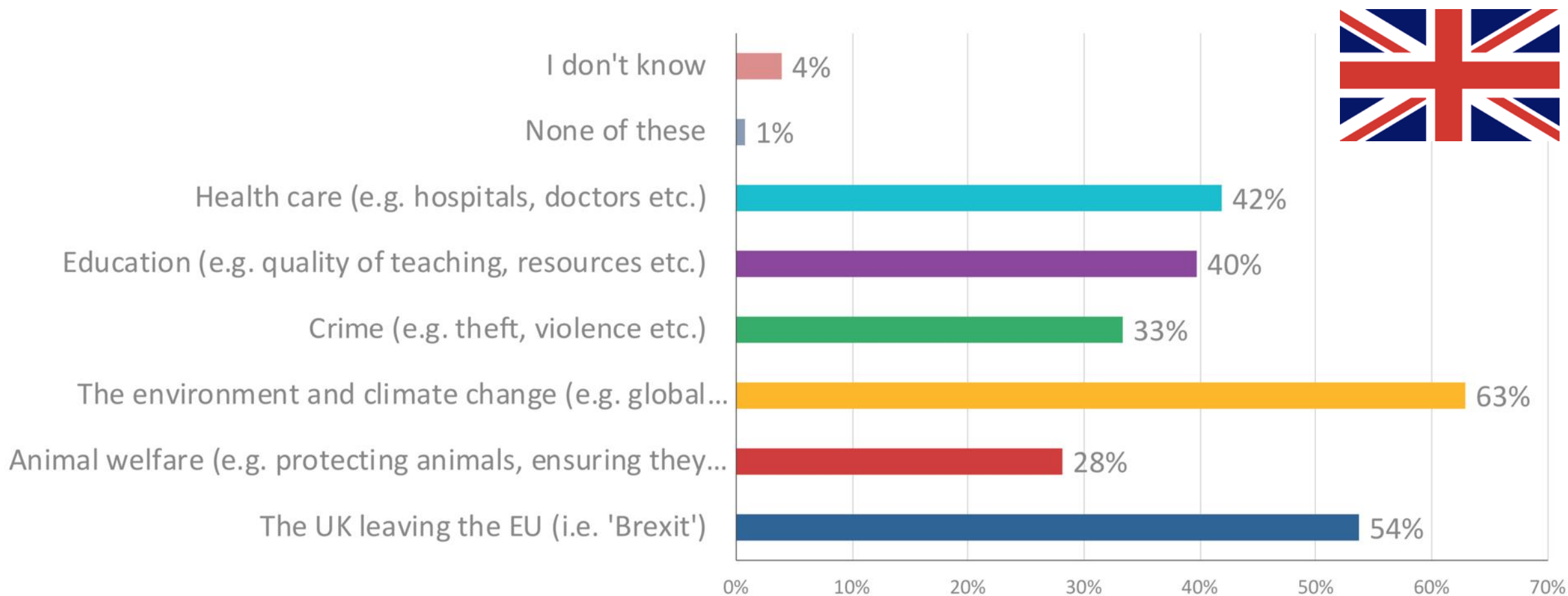


Dr. Food @ProfDavidHughes

Climate change-induced declines in agricultural production forecasted for Africa & much of Asia by 2050 (FAO). Hmmm, those are the same regions which will see the lion's share of the anticipated 2 bn. extra people in our world by then! Good news for some big commodity exporters.



What do young people see as the most important issue for the country at the moment?



The shoppers of the future have five key features

These Features are As Relevant in Emerging Markets as They Are in Mature Economies Like Oz



Be time-
optimisers



Be more health
conscious



Be more
individual



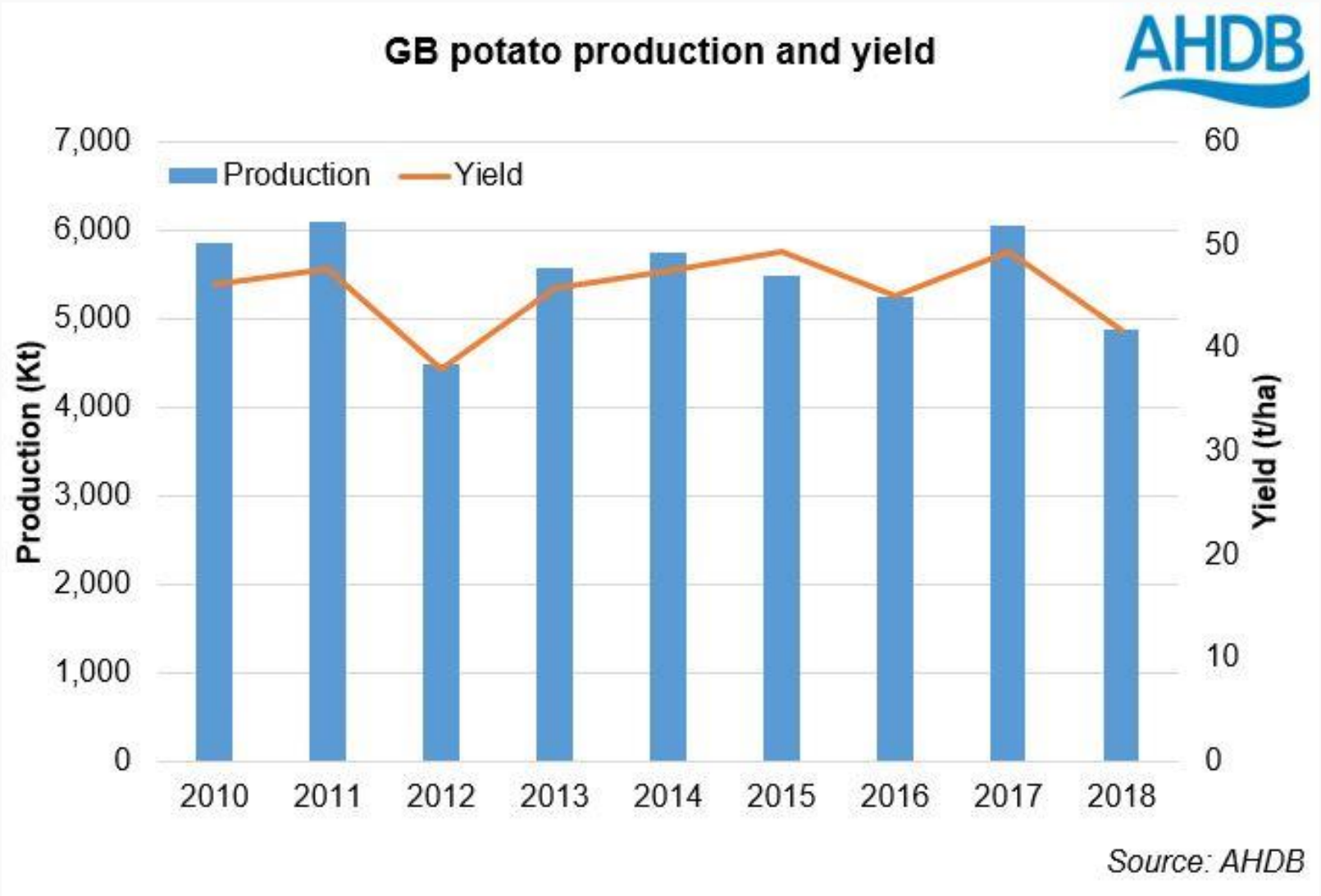
Be more
experimental



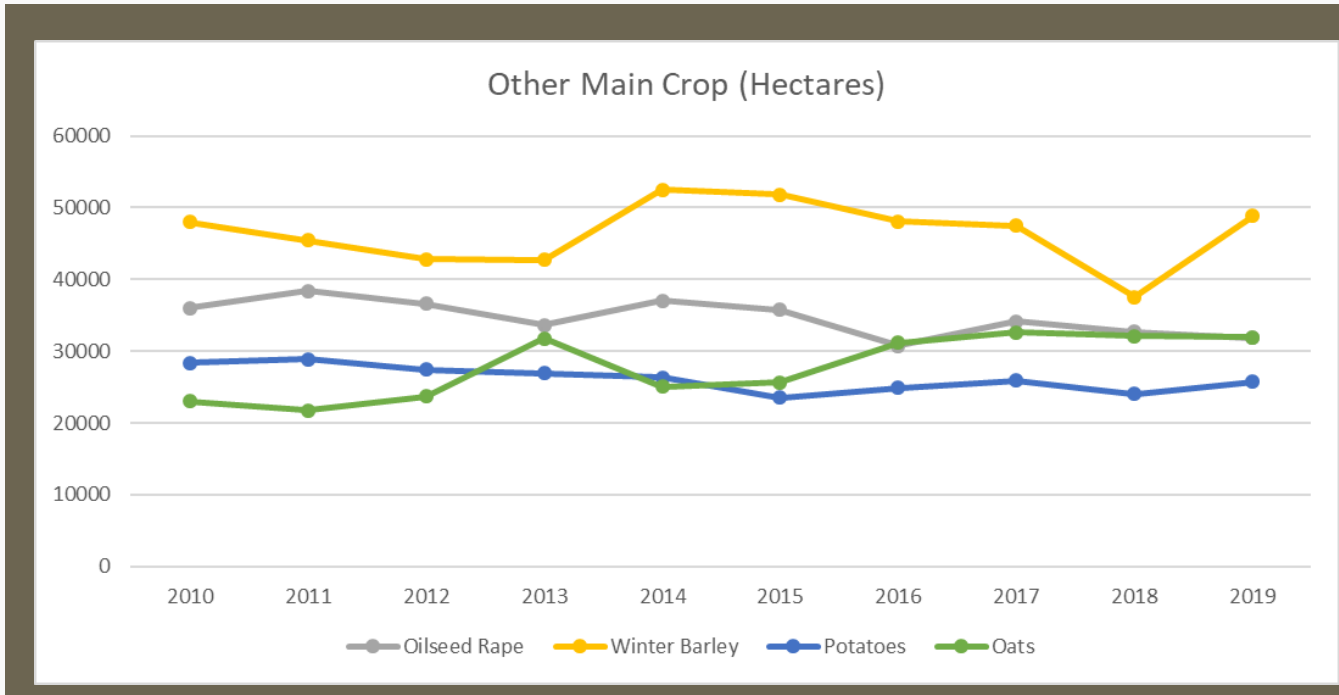
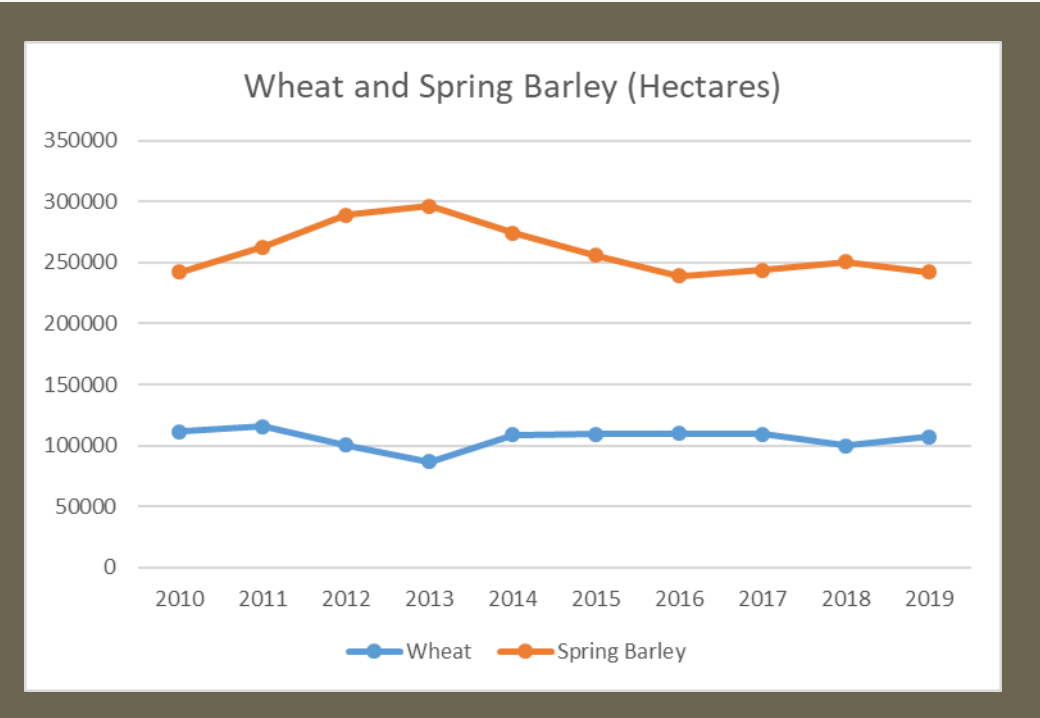
Be more
socially
conscious



Production: Potatoes

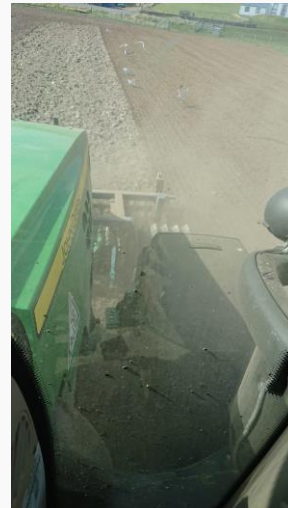


Production: Cereals



Costs:

- Potato harvester (self-propelled) 440k
- Tractor 140k for 200hp
- Nitrogen £180/ton its stayed static



- Grain store 10 000 ton store only 300k
- Labour – Manager 55k per year plus house and car, staff 30-35k plus house

Triple Bottom Line



Profit:

The traditional measure of corporate profit—the P & L account.

Planet:

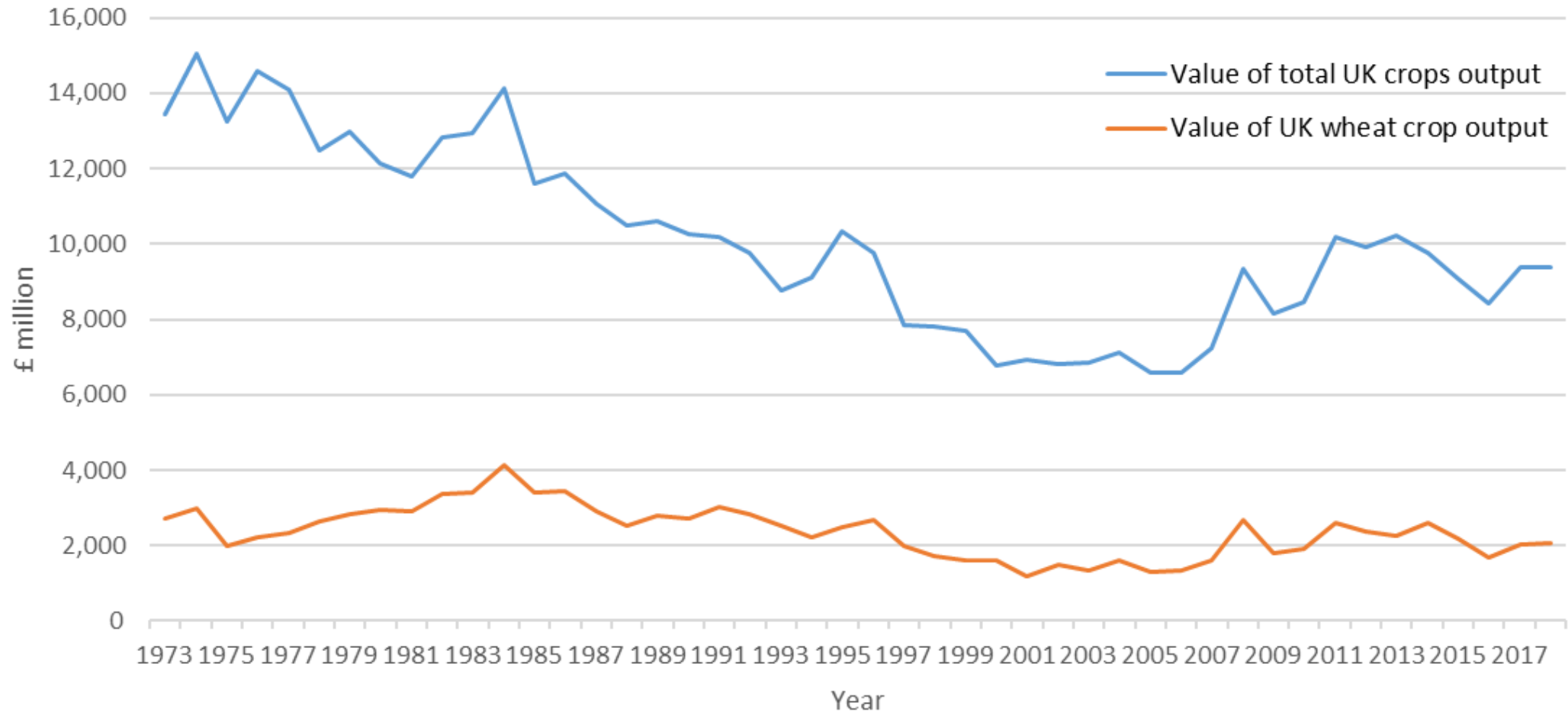
Measures how environmentally responsible a firm has been

People:

Measures how socially responsible an organization has been throughout its operations.

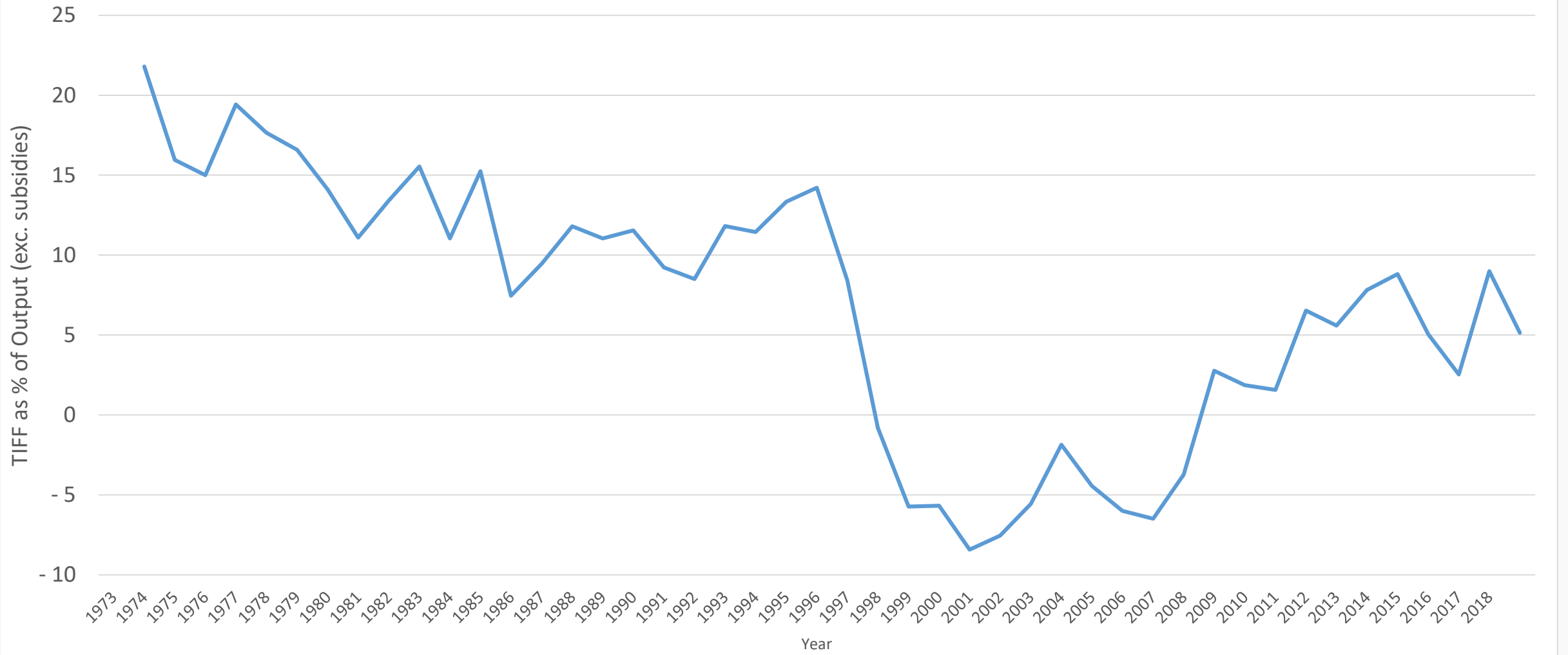
PROFIT

Value of total UK crop and wheat output 1973 to 2018
(excluding subsidies and in real terms at 2018 prices)

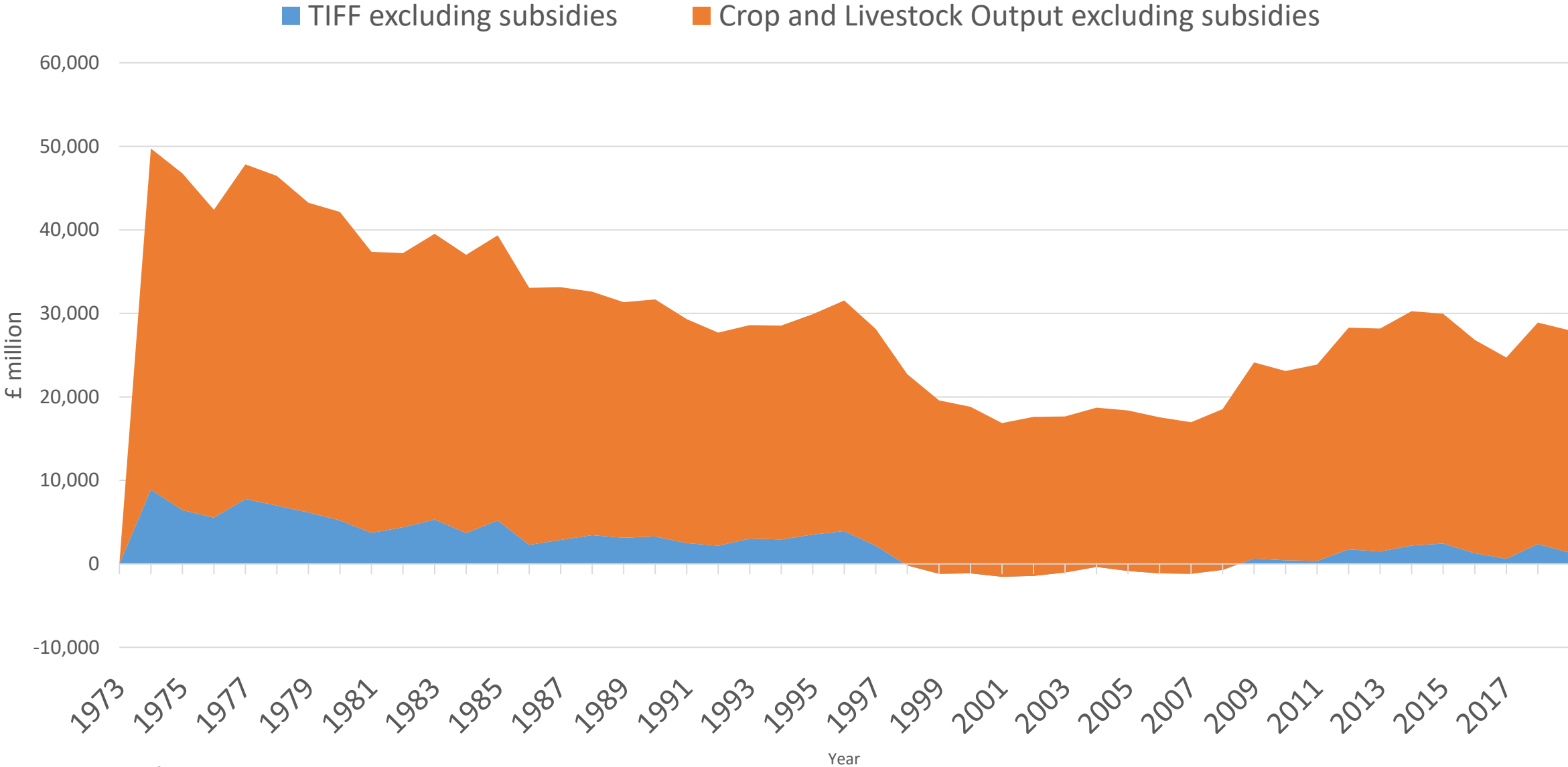


Source: Defra, AUK-Chapter4-06 Jun 19

UK Total Income from Farming as a % of Crop and Livestock Output 1973 to 2018 (excluding subsidies)



UK agricultural output and total income from farming 1973 to 2018 (excluding subsidies and in real terms at 2018 prices)



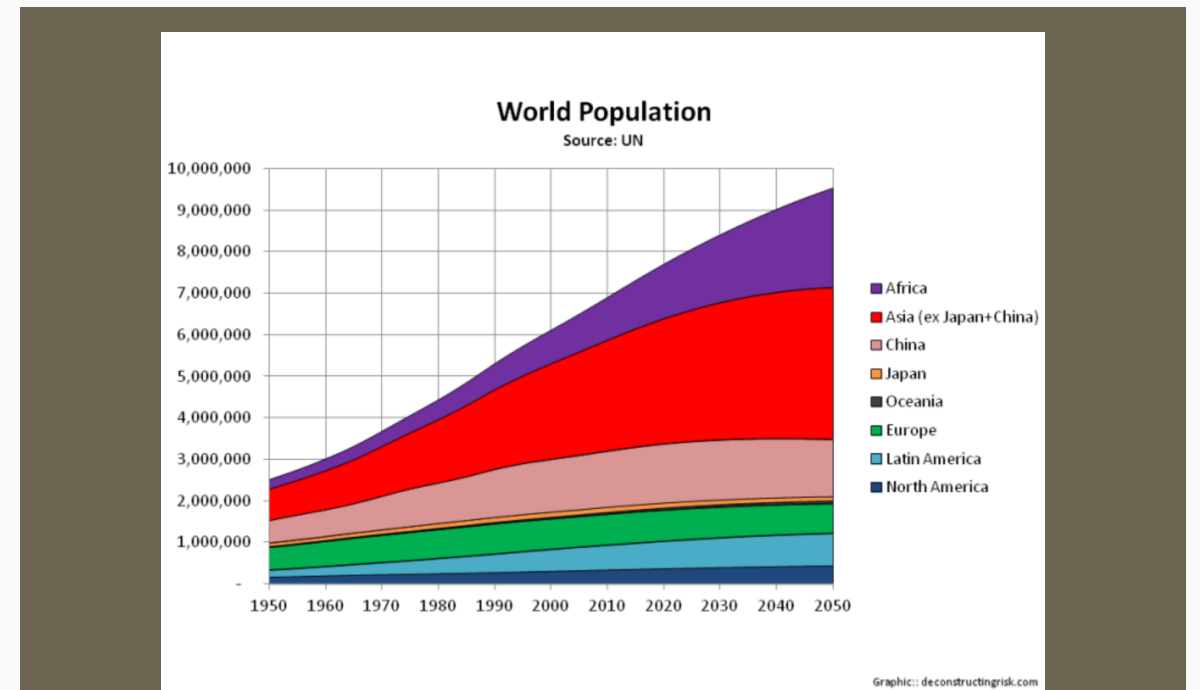
Source: Defra, AUK-Chapter4-06 Jun 19

PLANET: CAP – 38% of the European Union budget goes to Agriculture, EU Budget 162,273.34 million Euros



‘Change is inevitable whether that be business, consumer or political. Agriculture must be part of leading it and let their voice be heard “You're either at the table or on the menu” and its all of our responsibilities to make sure that our industry is represented positively and with compassion we deserve. We must be resilient and work and work together as one.’

People: China needs to feed 22% of the world's population on 7% of world's land





Video : PORAN MALANI



Thank You!