

FEBRUARY 2018

PRINTED IN 100% ECOLOGICAL RECYCLED PAPER

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BICTUAL®

INDEPENDENT FREE NEWSPAPER ABOUT THE ORGANIC SECTOR

"The soul is the same in all living creatures, although the body of each is different" HIPPOCRATES

BIOFACH & VIVANESS World's Leading Trade Fairs for Organic Food and Cosmetics

14 - 17 February 2018 | Nuremberg, Germany



©NuernbergMesse/Katrin Heim. Vegan Cooking show with Sophia Hoffmann







Petra Wolf, Member of the Management Board at NürnbergMesse



What do the world's leading organic food and cosmetic fairs, BIOFACH and VIVANESS, mean to NürnbergMesse?

BIOFACH, the World's Leading Trade Fair for Organic Food, and VIVANESS, the International Trade Petra Wolf is a member of the management board at NürnbergMesse, the beating heart of international trade in the city of Nuremberg, which hosts exhibitions and congresses for a wide range of sectors.

Ms. Wolf started as press manager at NürnbergMesse GmbH in 1997. She was then a team director of

Fair for Natural Personal Care, form a strong exhibition duo within NürnbergMesse's portfolio. The portfolio consists of 120 exhibitions and conferences, which are attended by roughly 30,000 exhibitors and about 1.4 million visitors every year. Around 30 exhibitions take place outside Nuremberg and are held primarily in the countries of our subsidiaries, but also in Russia and Japan. The exhibitions abroad reflect the business and sector priorities of their respective countries on the one hand and are based on the topic cluster of the ex-

marketing and press relations, as well as the head of several leading fairs in nearly 20 sectors around the world. She has been in charge of international business and a member of the management board since 2009. Ms. Wolf is also responsible for the new approach to "product management and innovation".

hibitions in Nuremberg on the other hand. This is particularly true for the car manufacturing, organic, coating, die-casting, window/ glass, beverage technology, pet care products, IT security, refrigeration and air-conditioning, pharmaceutical and powder/ bulk industries.

NürnbergMesse has proven expertise in the area of organic food. The international organic industry meets in Nuremberg every February at BIOFACH, the World's Leading Trade Fair for Organic Food, and the

Together with a team of more than 40 employees, Petra Wolf is in charge of BIOFACH and VIVANESS, the trade fair duo for the organic world, i.e. food and cosmetics, which welcomed representatives from 140 countries, 2,950 exhibitors and more than 50,000 visitors last year.

comprehensive range of certified organic products on display really demonstrates the sector's diversity. The BIOFACH Congress is also an integral part of the world-leading exhibition and is the only knowledge platform of its kind on the planet. BIOFACH World is represented across the globe by six other BIOFACH events in Japan, the United States, South America, China, India and, starting in July 2018, Thailand, and brings about 3,700 exhibitors and 100,000 trade visitors together year after year.





INTERVIEW



BIOFACH2018

into organic

VIVANESS2018

into natural beauty

How do sectoral monographic fairs provide development and a vision of the future to international trade?

NürnbergMesse's One of strengths is specialized trade fairs, tailored to particular sectors. We believe that these make an important contribution to the development and successful shaping of the future in their respective sectors. Let's take BIOFACH. It is nurtured by presenting the full extent of the organic industry's diversity here once a year. But that's not all: With the world's largest organic congress, its huge range of networking opportunities and the presence of numerous stakeholders, politicians and media organizations from over 140 countries, it is a place that plays an active role in shaping the sector's future and that lays down important foundation stones. With its focal theme "Next Generation", the 2018 edition will be very future-oriented and an example of how a strong and successful industry get-together like BIOFACH can provide inspiration and visions for a market.

BIOFACH and VIVANESS congresses are based on two pillars: knowledge transfer and the creation of organic world networks. How do you rate participation and the interest they arouse?

In 2017, more than 8,000 participants used the industry and knowledge forums, which included over 120 different sessions altogether, to obtain information and network with one another. International sector representatives discuss practice-oriented topics, learn from each other and share their knowledge at BIOFACH and VIVANESS congresses. In their way, they are internationally unique in the whole of the "organic world". With regard to its content, the BIOFACH Congress is divided into topics and forums. In addition to the general focal theme for 2018, "Next Generation", this year's will include the BIOFACH Forum, the Sustainability Forum, the Politics Forum, the Science Forum and the Fachhandels Forum. The VIVANESS Congress will cover topics from four main categories, which are markets and analyses, trade and sales, consumer insights and communication, and design, packaging and performance.

"Next Generation" is the motto of this edition. What is required from the young people who enter this sector and what is given to them?

The organic industry's first major event of the year will be focusing on the theme "Next Generation" this time round. This means that, among other things, the industry will be discussing which ideas the "next generation of the organic industry" should use to further develop the organic movement in production and on the market, and how the generational transition can be shaped successfully.



For young people who are entering the sector today, there is certainly an abundance of opportunities, but also challenges. Let me single out two aspects: the generational transition and the question about new styles for traditional goals.

There is a general consensus within the sector that the new generation share the traditional organic goals, such as a sustainable planet, respect for nature, a fair society and a global perspective from farm to fork. And, the commitment of all parties within the industry will remain essential, as will values such as reliability towards citizens and consumers, product authenticity and honesty in communication. But new people, new opportunities and new motivation are changing some of the methods and strategies being used to get close to these goals. The new generation will be discussing exactly what that means at BIOFACH 2018.■

BIOECO

PUBLISHER: Centipede Films,S.L.

POWERED BY: BioEco Actual

P.O.Box 74, c.p. 08211 Castellar del Vallès Barcelona – Spain Phone +34 937 474 319 +34 664 320 251 D.L.: B.1619-2017

PRINT 12,000 COPIES

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DIGITAL EDITION Oriol Urrutia and Pol Jiménez

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This publication has been possible thanks to the collaboration agreement with BIOFACH

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BIOFACH/VIVANESS 2018, the world-leading duo of the International Organic Industry

From 14 to 17 February 2018 a new edition of the world's leading organic trade fair will be held in Nuremberg. This event is waited with anticipation by suppliers and customers alike as it is an opportunity to meet friends, catch up on the latest advances and trends in production and consumption of organic food and cosmetics, introduce novelties and participate

in the many activities that will take place in the NürnbergMesse fairgrounds, which includes the BioFach Congress, the exhibition, knowledge exchange and networking platform. IFOAM Organics International is BioFach's international sponsor, whereas the German Federation of the Organic Food Industry (BÖLW) is its national supporting organization.

The Congress forums are Sustainability Forum, Policy Forum, Science Forum and Forum Fachhandels.

The 2018 highlights will include the BIOFACH Congress, the OLIVE OIL, VE-GAN and WINE Worlds of Experience and the BIOFACH Novelty Stand (located in hall 8 for the first time) with the BIOFACH Best New Product Awards.

Topics and Forums at BioFach Congress

"Next Generation" is the main topic of this edition and will include several related activities and projects such as the job market, Careers Centre, and the Organic Food Industry Research Awards. Next Generation will focus on the young generation that is taking over, and will assess what they are receiving after all these years of activism, at what point is the sector in each area and what are the next steps we need to take in order to develop and deepen the organic agriculture model, a model that includes social justice and that protects both animal and human health as well as the health of the planet.

Organic right from the start

"Organic right from the start" is a new special show that has been allocated a central location and that is sponsored by Bioverita. The show aims to introduce, discuss and present alternatives in the field of organic plant and animal breeding. Danila Brunner, executive director of BioFach and Vivaness says: "Organic practices as a concept in the sense of organic farming and management have to be taken into consideration right from the beginning." Markus Johann, Bioverita's managing director explains: "We are convinced that the organic industry can only continue to develop qualitatively and sustainably if there is independent organic breeding."



Vivaness 2018

Vivaness Congress, Novelty Stand, Young innovative Companies and Breeze area

The trends and development of the organic certified cosmetic market, as well as the commercial changes produced as a consequence of the digital age, including marketing, social networks, bloggers, etc. will be addressed thoroughly at the Vivaness Congress, which is divided into four categories: Markets and Analysis; Trade and Sales; Consumer Knowledge and Communication and Design and Packaging. Vivaness will welcome more than 250 exhibitors this year.

Ten German companies in the Young Innovative Companies pavilion, which have the support of the German Federal Ministry of Economic Affairs and Energy (BMWi), and the Breeze area, with around 20 participants from different countries, will offer their innovative products to specialist buyers.

A new area called "Let's Talk Vivaness", located in Hall 7A, will offer visitors a place to search and exchange information, sit down and talk with associations, certification bodies, institutions or media organizers.

The prize for the best VIVANESS Product will be awarded at the Novelty Stand.■





FOOD













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Markus Arbenz, Executive Director of IFOAM
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10,000 participants in the Organic World Congress India Leading Change, Organically!

The global General Assembly (GA) in India decided that "Organic 3.0 ¹ would be included in all strategies of stakeholders and would guide change in stakeholders' attitudes." IFOAM – Organics International is taking a lead with a new strategic plan and is assuming a new role as an agent of change.

The Organic World Congress (OWC) 2017 was inaugurated on 9 November by Shri Radha Mohan Singh, the Indian Minister for Agriculture and Farmers' Welfare. He said, "The Green Revolution has helped us to increase production but the use of chemical fertilizers and pesticides

Participants of this OWC and GA 2017 in India asked for innovation and continuous improvement



has destroyed thousands of hectares of land and brought about a crisis in Indian agriculture". He further emphasised the fact that we need food and health security and that increases in agricultural production have to go hand in hand with improved consumers' health.

One thousand farmers, along with 2.500 delegates from 90 countries participated in the conference. Over



7.000 persons visited the Festival, the BIOFACH India/APEDA Trade Fairs and the five Conference tracks.

Getting there was not easy. Attendees had to find funds to finance their travel expenses and congress fees. Traveling to an unfamiliar place with very different traditions was another challenge. In the end,

everybody agreed that this 19th OWC had been outstanding in the history of all OWCs. Highlights included touching stories such as the one from the Sikkim people who were the first to convert a whole state into 100% certified organic. The diversity of the over 4,000 seeds that farmers showcased was also impressive.

(1) https://www.ifoam.bio/sites/default/files/summary_organic3.o_print__o.pdf







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The Congress had four parallel conference tracks. At the Main Track, using "fishbowls" conversations, the leaders of the sector told their experiences and addressed their priorities and strategies. The Science Track published exciting research results, promoted innovations, debated research priorities and exchanged with farmers and practitioners. The Marketing Track recognized participatory guarantee systems as a viable tool for assurance and marketing. And farmers presented in the Farmers Track an astonishing diversity of practices united by the same principles even if the approaches are sometimes called differently: agroecology, ecological, organic, natural, fair trade, permaculture or biodynamic.

The General Assembly of IFOAM – Organics International took a number

The diversity of the over 4,000 seeds that farmers showcased was also impressive of far reaching decisions: the new president, as well as 7 of the 10 Board members, was elected; France was chosen among 10 bidders as the ideal place for the next OWC, and 25 motions that had been submitted by members were discussed and voted on. In addition Or-

ganic 3.0 was approved as the new strategic program, organic aquaculture was defined and a position statement on new breeding techniques was released.

Participants of this OWC and GA 2017 in India asked for innovation and

continuous improvement; for closer producer/consumer relations and further trust building; for inclusiveness and further expansion, and for empowerment of the men and women of this and next generation involved in the value chain ².

A New Narrative: discussed and approved in Delhi!

The world faces many challenges: poverty, hunger, malnutrition and unfair distribution of wealth and power are prevailing, permanent biodiversity loss rate is dramatic, natural resources like soil and water are deteriorating and the planet's climate is irreversibly changing. Agriculture and related value chains, as presently practiced, are among the main causes of these problems and are also responsible for bringing the planet to its limit. There is a wide consensus that we need to move towards more sustainable agriculture and food systems and that business as usual is not an option any more. But agriculture - done differently - can also be part of the solution. If we get it right with agriculture and food systems, we will get it right for people and the planet! Organic agriculture, a dynamic and continuously developing

farming system based on the science of agro-ecology, is the forerunner of truly sustainable agriculture and offers practical solutions to address major global challenges. Organic agriculture and equally sustainable systems produce healthy, nutritious food and other natural products for a growing population. They enable farmers to earn a fair living, regenerate and enhance soil fertility and biodiversity, safeguard and replenish scarce water resources, mitigate climate change and help people who have been negatively impacted on to adapt to it and become more resilient.

As an agent of change, IFOAM – Organics International - legitimized by its membership and in collaboration with its networks - facilitates and actively contributes to improvements towards

true sustainability in agriculture, in its value chains and in consumption. It pursues the trifold goal of enhancing the growth of the global organic sector, of making it more sustainable and of inspiring mainstream agriculture. In order to fully utilize the potential of organic agriculture, we work on three key levels:

- We enhance Supply by developing operators' (and other value chain actors) capacity
- We stimulate Demand by supporting communication and by launching awareness campaigns; and
- We advocate for a Policy and Guarantee environment that is conducive to truly sustainable production and consumption.

(2) See the conference declaration 2017: https://www.ifoam.bio/en/news/2017/12/07/organic-world-congress-recap







RESEARCH INSTITUTE OF ORGANIC AGRICULTURE

Miguel de Porras, Co-Director FiBL Europe (M.Sc. Agroecology) and Urs Niggli, Director FiBL (M.Sc. ETH Agricultural Sciences)

Developing tools that improve the transparency of the EU organic sector

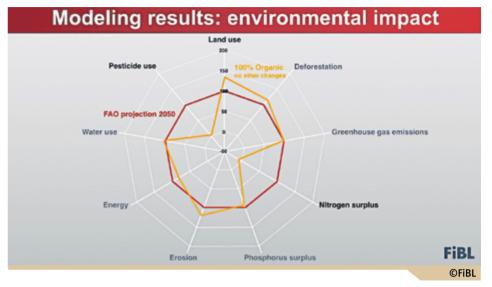


Over the last few years, the number of organic operators has increased notably and thus the number of providers of goods and services, retailers,

With the aim of putting scientific excellence at the service of organic farmers and consumers, FiBL has been developing instruments that provide security and transparency to the national organic markets

etc., adding an enormous complexity to the organic farming. Myriads of products, services and companies have joined the organic farming sector, making it almost impossible to distinguish organic from non-organic. Trust between the different actors of the market is the cornerstone of organic agriculture. Under these complex conditions, it is becoming more and more difficult for all actors in the organic sector to oversee the suppliers of various products.

Farmers, as the first pillar of the organic sector, need to guarantee their compliance with the strict organic rules and, at the same time, need to keep their levels of production. Retailers, as the main channel for the distribution of organic products, need to have security with regard to the validity of their suppliers' certification. Last but not least, organic consumers are the main actors that demand transparency from the sector, as they



are willing to pay more for products with better environmental performance; they trust in the organic label.

With the aim of putting scientific excellence at the service of organic farmers and consumers, FiBL has been developing instruments that provide security and transparency to the national organic markets. This

allows FiBL to develop the capacities and the skills to increase these projects and expand them to the entire EU, with the aim of solving the transparency problems that the organic sector faces at EU level.

In this sense, the different FiBL sites are cooperating closely in order to build open databases that are easily ac-





RESEARCH INSTITUTE OF ORGANIC AGRICULTURE

cessible to any kind of actor who wants to check the availability or compliance of inputs, services and certifications with the EU organic regulation. The following three databases have been developed by several FiBL teams in order to solve the main problems of transparency in the EU market:

- EU Input List: For many years FiBL has been publishing in Switzerland, Germany and the Netherlands a positive list of inputs available for organic agriculture. Together with other partners, FiBL is using all this expertise in the field to create a European input list, as a onestop-shop for farmers, advisors, inspectors and manufacturers so they can check the compliance of commercial inputs with the EU organic legislation.
- OrganicXseeds: FiBL developed this database to gather all available information about the organic seed market. This tool aims to bring more transparency to farmers, not only on the availability of the organic seeds at EU level but also by managing the potential derogations in the different member states.

• Bio C: An online database with constantly updated information about the certification of organic operators. Retailers and other market players can immediately check the validity of their suppliers' certification, avoiding risks in the supply chain. So far suppliers have not had this option. Now, this tool offers the possibility to guarantee the organic origin of the purchased products.

These initiatives aim to build transparent solutions for some of the current problems that the different actors are facing, in order to increase the trust in the sector. FiBL is committed to the development of the organic sector, and transparency is the key to guarantee the future success of the organic sector in the EU.

SMART, a reliable tool for assessing the sustainability of agricultural holdings.

FiBL is one of the leading research institutions in the scientific assessment of sustainability, one of its flagship products in this field is SMART (Sustainability Monitoring and Assessment Routine). Following the the-

Food wastage strategies

Livespire Special

Human consumption

FiBL

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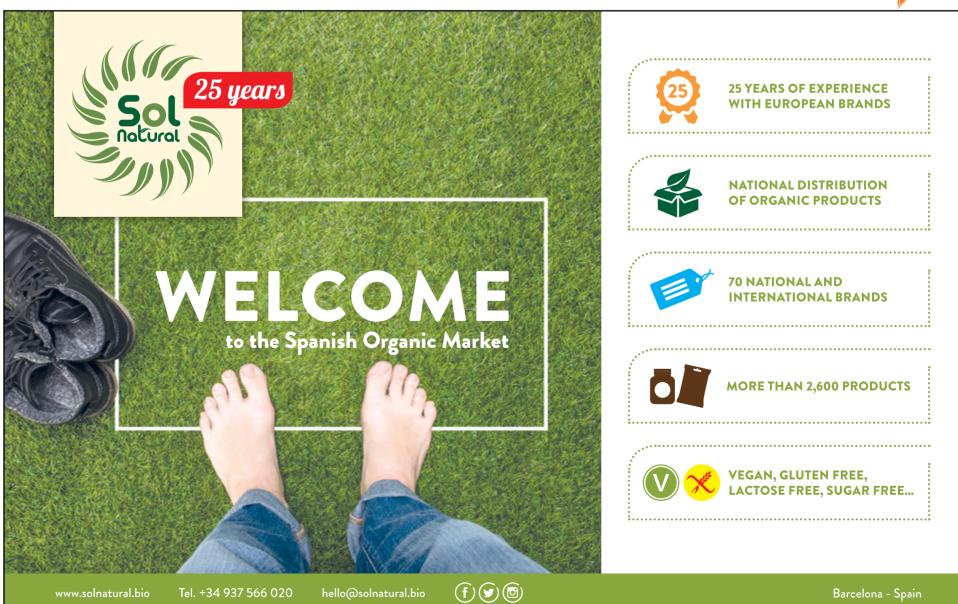
oretical framework of the FAO SAFA (Sustainability Assessment of Food and Agriculture systems) guidelines, FiBL has developed this tool that allows assessing the sustainability of a farm in a holistic manner.

This tool has been applied on almost 3000 farms all over the world, producing comparable data on the economic, social, environmental and governance aspects of the sustainability of a specific farm. It employs more than 300 variables, whose data are collected through an audit system based on a farm visit and an interview with the farmer. The collected infor-

mation on biodiversity, prices, wages, accounting systems, etc. is compiled and displayed in a report which summarizes the strengths and deficits of a farm in each field of sustainability. The report also provides a set of suggestions to implement on the respective farms; thus not only measuring but also supporting the improvement of the sustainability performance of each analysed farm.

For additional information, you can check the website of Sustainable Food Systems, a FiBL spin-off dedicated to the implementation of SMART: www.sustainable-food-systems.com.







Jabones Beltrán, Tradition and innovation

Jabones Beltrán is a Spanish family company that manufactures natural soap-based cosmetics and laundry products. Founded in 1922 in Castellón (Spain), the company has been evolving and innovating without losing its traditional character, always giving priority to the quality and sustainability of its products.

"Our mission today is to continue manufacturing products based on traditional soap, that are respectful to our health and the environment, highly efficient and sustainable, and supported by an organic certification," says Mara Beltrán, commercial director and fourth generation of the Beltrán family.

Handmade processes

A distinctive aspect of this company is that many of its manufacturing processes are artisan. This is the reason why they have obtained the Sello de Artesanía (craftwork seal) from the Valencian Community in Spain.

Philosophy and values

"We are committed to sustainability at all levels; we aim to ensure that both our final products as well as our production system are socially and environmentally sustainable," says Iris Beltrán, head of strategy and operations. The guiding principles that govern decision making and business improvement are based on Jabones Beltrán's ethical code, available on its website.

BIOBEL - Innovation and quality in ecological cleaning

bioBel is the first brand of organic soaps and detergents manufactured in Spain. Its products are based on natural soap and therefore, they not only clean, care and soften your clothes, but are also respectful to our health, gentle on sensitive skin, and environmentally friendly.

The collection consists of liquid detergent, delicate garments, babies, stain removers, bleach, bar soap, glass cleaner, multi-purpose household cleaner, manual and automatic dishwasher, salt and polisher. All references are certified by Ecocert, one of the most strict certification bodies in this field. All products are biodegradable and suitable for vegans, and their residues can be used as irrigation waters.

ESSABO – Organic artisan soap factory

Essabó are high-end cosmetic soaps certified as organic in the highest possible category by Bio.Inspecta, under the BioVidaSana standard. Essabó produces the traditional bars of soap that cleans and cares for the most delicate and sensitive skin.





The soaps are made following a cold saponification process, which preserves their properties better. They are subsequently demoulded and cut, in a manual process performed with much attention and care.

The collection consists of three soaps, Amazon, Mediterranean and Sahara; all have very elaborate formulas, based on organic coconut and olive oils. Each bar of soap contains different essential oils, plant extracts and other organic oils of high cosmetic value. They are beautifully presented and include detailed information

about the manufacturing process and the origin of each ingredient.

Jabones Beltrán is a benchmark soap products manufacturer and its brands are very well positioned in the Spanish market. The company is currently beginning its expansion in Europe and is looking for distributors in the organic sector. If you are interested please contact them at:

comercial@jabonesbeltran.com www.jabonesbeltran.com





Founded in 1922 in Castellón (Spain), the company has been evolving and innovating without losing its traditional character



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FOOD





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Antje Koelling,
Policy Advisor for Demeter-International | www.demeter.net

Demeter – a pioneer and dynamic organic brand

demeter – biodynamisch seit 1924



The Demeter brand, which was created in 1928, celebrates its 90th birthday this year. The Demeter label can be found on food, beverages, seed, textiles, cosmetics and pet-food that are produced according to the Biodynamic principles. The foundation of the Biodynamic farming movement was the agricultural course held by philosopher Rudolf Steiner in 1924. A group of farmers who felt inspired by anthroposophy had urged the visionary thinker for advice as they were concerned about declining soil fertility.

Currently 180,000 hectares in 54 countries are Demeter certified. The standards are guaranteed and are continuously under further develop-

ment by Demeter-International. More precisely, representatives of Demeter and Biodynamic associations from 23 different countries in five continents come together every year to discuss and decide on current challenges and further developments of the standards. Certification is undertaken either by a national association or – in countries still without an organised certification association – through Demeter-International.

This article aims to explore what role a private association and a private standard, both originated after an agricultural course held almost a century ago, can have in today's organic movement and market. A Demeter-International workshop in 2016 identified several strengths, questions and demands of the Biodynamic movements in the organic vision process – the results are the basis of this article.



Preserving values and innovating food systems

The organic sector is growing and diversifying. From a local and small scale community supported agriculture (CSA) to family owned companies trading worldwide or companies owned by financial holdings – all exist under the organic roof. Do organic movements have a common vision? The Organic 3.0 discussion that took place within IF-OAM and also at Biofach last year raised this question, which led to some controversy. Where should organics go? Is the efficient use of natural resources the supreme goal of organic farming? Does this end justify all means? Do we need to accept all potential innovations in order to succeed?

Although the rules of profit and loss also apply to the organic market, organic values and principles must be guiding when it comes to further developments.

Development and innovation have always been an integral part of the organic movement. Biodynamic farmers have been innovative in enhancing soil fertility and biodiversity in the farm, in organising work processes, in contributing to social advances, and in trying new models of marketing and property ownership such as turning a family farm into a CSA or a charitable trust to ensure continuity of the organic management. The organic sector needs a broad innovative approach that also includes social innovation, to face future challenges and underpin continuous improvement.

To assess the usefulness of innovation in the organic sector, as well as the organic principles and values that need to be applied in a democratic process.

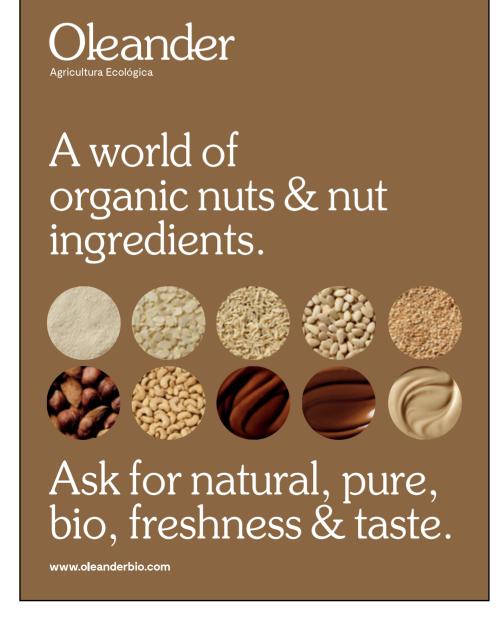
Being a driver for comprehensive sustainability

Sustainability in the organic dimension is and must remain a major characteristic of organic farming. It must be progressively further developed, but the organic movement must also find answers to challenges in the cultural, social and economic areas. Fair prices throughout the food chain, the relationship between rural and urban communities, regional food-and-farming identities and enrichment of food diversity through exchange and migration are issues where the organic sector can set positive examples.

The value driven approach offered by private associations such as Demeter is the foundation of further development of organic food and farming systems and can establish best practice examples on association scale before they come to broader application.

Representatives
of Demeter and
Biodynamic
associations from 23
different countries in
five continents come
together every year
to discuss and decide
on current challenges
and further
developments of the
standards





BIODYNAMIC AGRICULTURE



90 years of tradition have taught that picking up new impulses is important, but just following the next fashion wave does not promote fundamental improvement. Organics must not aim to perform best on one-sided sustainability aspect while neglecting others. It must aim to establish the best available practices for a comprehensive sustainability approach.

Organic standards and controls are important to assure consumers that they get true organic quality. However, to encourage and empower operators to make the best of their individual potential, we need peer consulting and work with individual development goals. Demeter is again

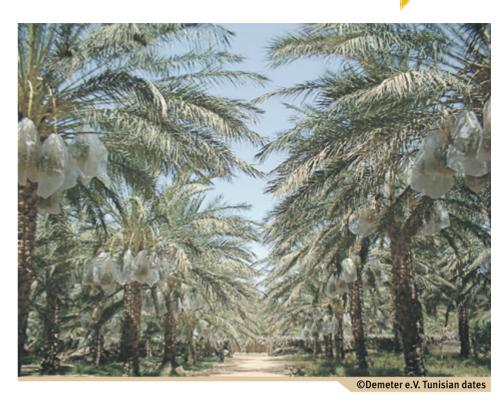
Private organic associations and private standards such as Demeter have been drivers of organic development

a pioneer in this field; farm talks and in some countries development talks for all operations are now about to be established as a central part of the Demeter standard.

Communicating with consumers

Consumers trust in the co-brand Demeter, especially when the brand is partnered with a straight corporate identity and when there is active communication that ensures transparency and authenticity. We show farms, faces, stories and the value based background of Demeter-products.

A living dialogue amongst farmers, researchers, food chain operators, consumers and civil society organisations is essential to ensure that organic food production remains a valued and consensus driven system. If consumers are not only considered as clients, but as building links with organic operators, there will be benefit in both sides. The Community Supported Agriculture projects are a best practice example for the direct involvement of consumers.



Conclusion

Private organic associations and private standards such as Demeter have been drivers of organic development because they have been pioneers in establishing trusted producer-consumer relationships, in democratic standard-setting and in providing the

best qualities and progress towards improved performance on a comprehensive set of sustainability criteria. Their role is now as important as ever, as the food and farming sector is facing new challenges such as climate change, further loss of (agro-) biodiversity, market volatility, speculation on land, and other local and global issues.







Pedro López Salcedo, PROVOTEC. Advanced consulting for the agri-food sector - www.provotec.es

Organic market: reasons for the success of a thriving sector

For the last few years, the question at each new edition of BioFach has not been whether the organic food market is growing, but at what rate. We have become used to annual rates of 10% or above, which do not even come close to those of the conventional food market.

What are the factors responsible for the good health of organic market? Knowing them and managing them wisely will help to consolidate the strength of this sector.

Good market prospects also in 2017

In its 2017 report on the structuring and characterization of the organic sector, the Spanish Ministry of Agriculture, Fishery, Food and Environment estimated that the world market grew more than 16% in 2016, reaching around \in 88,000 million, a positive trend that, at the time of writing this article, seems to continue in 2017.

Expansion of the sector

The incorporation of conventional producers and processors to the organic segment is a phenomenon accelerated by the interest on an already solid sector. As a result, the availability and variety of organic products increase, thanks to the more efficient distribution networks of these operators.

More points of sale

European conventional retailers are also paying more attention to organic goods, and are incorporating a permanent wide range of products to their lines. This strategy, so far common in northern Europe, is becoming the norm in countries with a tradition of specialized sales, such as France, Italy, Spain and Portugal, where organic market accounts for nearly 50% of the total market share.

Smooth relations between conventional operators and retailers, in addition to well-coordinated logistic networks, speed up the organic supply chain and consequently amplify the presence of organic products at the point of sale. More presence in conventional establishments means increased consumers awareness, interest and accessibility to these products.

Favourable consumption trends

Recent international consumer surveys highlight several trends that might be influencing the decision of buying organic products.



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First, there is a growing demand for more healthy products. Plant foods free of synthetic fertilizers and phytosanitary residues, animal products free from antibiotics, and processed foods free from additives have been traditionally identified as healthy products. These are also the distinctive characteristics of organic production.

In addition, there are universal concerns about the impact of food production on the environment and natural resources, in the context of an emerging movement that demands more sustainable production. Again, consumers perceive organic production as more environmentally friendly.

Another important aspect is the growing demand to producers and manufacturers for more transparency and ethical behaviour in everything related with manufacturing processes.

Organic production, more regulated on these respects than conventional one, is again at advantage when it comes to corporate social responsibility.

Finally, vegetarian diets are becoming more popular and it is well known that vegetarian consumers are more prone to buy organic products.

The organic sector should not forget that consumers buy organic products because they believe that due to their characteristics and method of production they are going to fulfil a number of personal needs. These needs are the real reason behind consumers' choices.

If consumers continue to see organic products as sustainable, healthy and environmentally friendly, the good health of the organic market is guaranteed. It is the duty of all operators in the sector to give consumers reasons to do so.





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INTERVIEW

Enric Urrutia, Bio Eco Actual, Director, pioecoactual.com – www.bioecoactual.com

Eduardo Cuoco, **IFOAM EU Director**



for European organic producers?

Agriculture is a shared competence between the EU Member States and the European Union. The EU Institutions create laws and regulations that govern the way in which producers work, as well as the funds for agriculture. It is therefore crucial that the organic movement has the possibility to speak with a united voice at the European level.

IFOAM EU represents more than 190 member associations in the EU-28. the EU accession countries and EFTA. Member organisations span the entire organic food chain and beyond: from farmers and processors, retailers, certifiers, consultants, traders and researchers to environmental and consumer advocacy bodies.

The European organic market has continued to grow during the

Why is IFOAM EU important financial crisis, showing a growth rate of approximately 12.6% in 2015. Valued at EUR 27.1 billion in 2015, the EU-28 is the second biggest single market for organic products in the world after the United States. IFOAM EU makes sure that the interests of such a growing sector are adequately represented by an umbrella organisation that takes into account the needs of the entire supply chain and beyond.

> Europe is a very unequal continent in terms of consumption and organic production in different countries. How does IFOAM EU balance and defend community objectives above those of a particular "biopower"?

> Since its establishment in 2003, IFOAM EU has put an extra effort to ensure that its decision-making

structure takes into account the interests and the specificity of its members from the different Member States as well as the different segments of the supply chain.

IFOAM EU positions are developed with a bottom-up approach and before being published they must receive widespread support from the interested parties.

The organic sector is increasingly large and undergoing continuous transformations and expansions. How can we maintain the essence of products, awareness and respect for producers, consumers and the environment?

European citizens are recognising more and more the added value of organic food and farming and are increasing the consumption of organic products.



Organic agriculture is based on four principles: health, ecology, fairness and care. Together, the four principles provide for a system of agriculture and food production that is both beneficial to people and the planet. Organic operators perform a dual role - they produce high quality goods for markets (e.g. food, feed, fibre), whilst at the same time they deliver public goods for society.









BIOECO ACTUAL

INTERVIEW



The growth of organic market is a great opportunity for our sector, but it is also a big challenge - we need to guarantee that consumer's trust keeps high, that organic principles are considered and that the integrity of the organic supply chain is continually improved (e.g. by advocating on the organic regulation and the control system and by supporting the improvement of the organic standards).

Organic Vision 2030: What is the secret for making Europe more organic? And how the organic professional can help with this?

Our vision for Europe in 2030 is a fair, environmentally conscious, healthy and caring food and farming system. We identified three cornerstones we want to achieve by 2030:

Organic on every table: the contribution of organic to sustainable food systems is recognised by policy-makers and citizens and matched with a growing land share and supply of organic products.

Improve – Inspire – Deliver: organic food and farming systems are

resilient and continuously improving their performance, and inspire a positive change in our knowledge systems and diets.

Fair play – Fair pay: value and power are fairly distributed among all the operators in the supply chain, and the costs and benefits of food production are accounted for.

To achieve this vision, we - food and farming actors, policy-makers and citizens - must make this happen. Our roadmap is an invitation for us all to start – or continue! – actively shaping the agri-food systems that we want to see in Europe and beyond. To inspire this positive change, we launched an online space euorganic2030.bio where real-world examples of strategies and initiatives that are working across Europe will be shared. For the moment, there is a small selection of such leading initiatives and it is our intention to keep highlighting and promoting other initiatives already up and running throughout Europe. Visit euorganic2030.bio for strategies that will inspire you and submit your own initiative. You can also follow live updates about the roadmap and inspirational examples on social media using #EUorganic2030.

How are we going to reach Organic Vision 2030 if every month a number of animals equivalent to the population of the whole planet are slaughtered?

The organic movement aims to contribute to the health and well-being

of farm animals. Organic regulations define the conditions that meet the high welfare standards set out by the organic principles. To contribute to the overall enhancement of EU standards for animal welfare and health, IFOAM EU supports initiatives that aim to improve the EU legislative framework regarding this issue.

Organic principles are designed to ensure that animals are treated with compassion. For example, we look for breeds that are robust, able to adapt to local conditions and are

TRANSFORMING FOOD & FARMING IN EUROPE

An organic roadmap to our Vision 2030

MAKING IT HAPPEN

Red our Vision for section sock I farming by plants

See the past on the past of the past

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disease-resistant; their feed does not contain any substances that artificially promote growth, synthetic amino acids or genetically modified organisms (GMOs); living conditions are improved by assuring appropriate space to live in, access to natural air and light and guaranteeing the possibility to be outdoors.

Further, organic principles ensure that animal suffering is kept to a minimum throughout the animals' life, including transportation and slaughtering.











If you want to buy, sell or network in the Spanish organic market, do not hesitate: start in Catalonia

When deciding where, when and how much to invest in a business, figures matter enormously. If you are planning to invest in Spain, which is already the tenth largest organic consumer in the world, let me show you solid and specific reasons why Catalonia should be your first choice.

Catalonia has always been at the vanguard in many sectors of production, and the organic sector is no exception. We could say that, despite being geographically on the periphery of the Iberian Peninsula, our nation is the epicentre of the transformation and distribution of organic foods in Spain, and has outstanding communications and development perspectives.

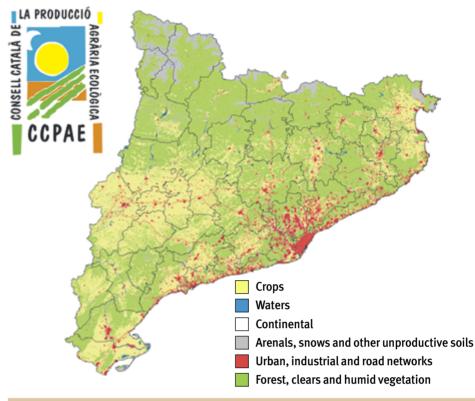
The recently official data published by the Spanish Ministry confirm this leading position and its upward trend. Regarding operators registered by activity, that is, the total number of vegetable producers, stockbreeders, processors, importers, exporters, wholesalers and retailers, in 2016 Catalonia stood at 9.44% of the state total, but more importantly, clearly headed the ranking of manufacturing companies (25.7%), marketers (26.01%) and importers (36.1%).

Fifteen percent of the Spanish transforming activity volume (related to both plant and animal production), takes place in Catalonia. Our region is leader in the production of beverages (19.57%), especially wineries (21.86%); the manufacture of fodders (22.88%) and the production of meat and canned meat products (28.35%). Catalonia also plays an important role in other sub-sectors such as bread production (21.11%) and dairy industry (17.52%). In addition Catalonia is increasing its presence in the fruit and vegetable processing (8.94%) and vegetable oils production sectors (10.21%).

These data explain Catalonia's large export capacity but also show its potential as a significant domestic consumer market. In fact, the Catalan organic agri-food market will have grown by 25% in 2020. At present it already accounts for almost 3% of Catalonia's total agri-food market, while in the rest of Spain it hardly reaches 1.5%.

Dynamic sector and reliable certification: keys to the success of the organic sector in Catalonia

One of the keys to the positive evolution and growth potential of the Catalan organic sector is the work made by our organization, the Catalan Council for Organic Agricultural Production, to offer a demanding, high-quality certification. We have more than 17 years of experience in this field and are continuously



HansenBCN©CC BY-SA 3.o. Catalonian Map

expanding in cooperation with this dynamic and enterprising sector.

Catalonia made the initial decision of developing a pioneering public model of control and certification of organic food, as opposed to the privatization of the control system characteristic of many European countries. This joint commitment of industry, administration and society has proven successful and has gained credibility in the market.

In order to ensure the visibility of those farmers, stockbreeders and companies that are doing things well, our organization keeps updated its online Operators Guide (www. ccpae.org/guia), where you can find all the certified organic operators in Catalonia. I invite you to visit us, it may be the beginning of a productive business relationship with some of the most dynamic and enterprising companies in our small but great country. ■





FAIRS







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Clara Bosch Codern, Chemical engineer specialized in organic cosmetics clarabosch@naturcosmetika.com | www.naturcosmetika.com

The megatrend of certified natural and organic cosmetics

It is not a secret that natural and organic beauty products are a global megatrend. Every year more and more consumers are discovering natural cosmetics after having been disillusioned with conventional ones. Consumers find out about natural cosmetics through many different ways, but whatever these are, the important fact is that after having tried this type of cosmetics

In order to care of ourselves what we put on our body is as important as what we put in it and experienced their high quality, many consumers will repeat.

Most consumers will start using natural cosmetics after having spent some time consuming organic food. Many people choose organic food because they find it healthier and tastier. In addition, the number of vegans and vegetarians is growing, as well as concerns about animal welfare. When people start to learn about where food comes from and about the organic food world, then it is very likely that they also discover other organic worlds such as cosmetics. They realize that in order to care of ourselves what we put on our body is as important as what we put in it.

Another additional reason con-



sumers choose organic cosmetics is because they want to avoid certain substances (such as parabens or others). One of the causes for the bad press of conventional ingredients, sometimes justified, are the atrocities that have been made for years in the conventional cosmetics sector. For example, in the 1920s, taking advantage of the radioactivity fashion, toothpastes with radio were launched, and were later proved to

be extremely toxic and carcinogenic. The Internet has also made it easier to read and understand lists of ingredients and their beneficial or harmful properties.

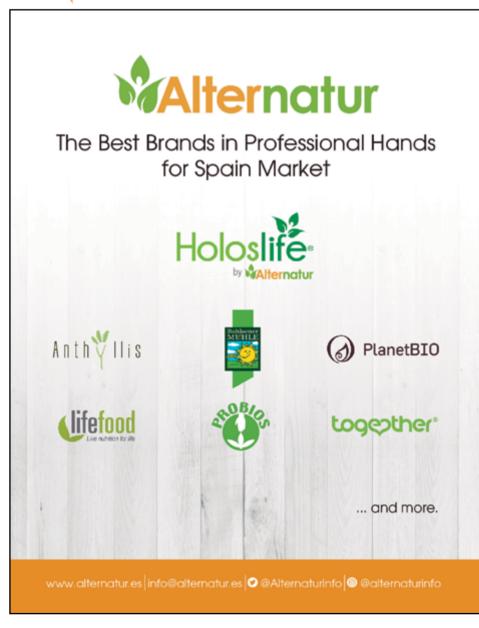
Finally, another key motive leading people to the world of natural cosmetics is the growing desire in our society to return to nature. Because of the rising awareness of problems such as climate change or

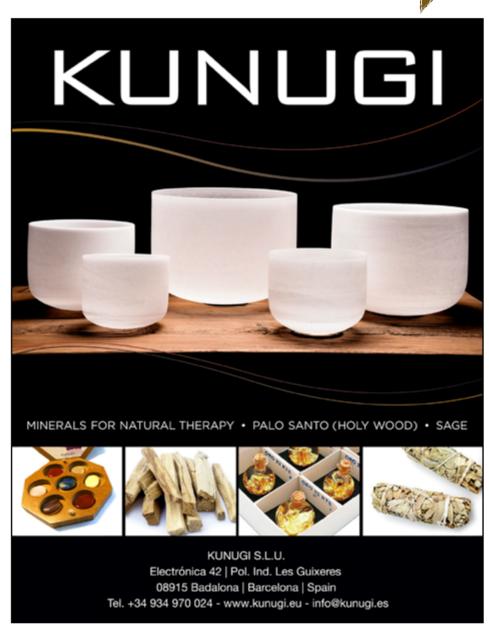


FOOD

MINERALOGY







ORGANIC COSMETICS



pollution, consumers are demanding that in addition to being of natural origin, beauty products have the least possible environmental impact. This affects many aspects of cosmetic products, from using a recycled and recyclable packaging to assuring the sustainable origin of the raw materials. For example the latest controversy on microbeads, the tiny pieces of plastic widely used in conventional cosmetics such as sunscreens that end up in the oceans, has shown the need for any cosmetic product to be biodegradable.

Organic cosmetics are the answer to all these concerns. The world of organic beauty products encompasses a wide range of brands, from premium brands, with complex formulas rich in valuable extracts to brands with simpler natural formulas. You can find organic personal care products for all budgets.

Organic consumers are usually very loyal customers as they see buying organic products as part of their philosophy of life. They highly value clear and detailed information, and typically read the list of ingredients with much attention.

Organic cosmetics include all categories of beauty products, from personal hygiene, makeup and suncare products, to perfumes and even hair dyes. All have in common their high quality and their compliance with the most rigorous principles of organic certification.

Several natural cosmetics brands

with more than 30 years' experience in the organic sector are now launching more innovative products, following the latest trends in the conventional market. They are innovating in new scents, textures, ingredients from 'exotic' plants or highly efficient ingredients, such as natural hyaluronic acid or natural coenzyme Q10.

The rise of natural cosmetics has also led to increased competition in the sector. Organic beauty products market is growing fast even in countries with little culture of these products. Unfortunately this growth has also brought many fake natural products. These products are clearly deceptive for the consumer, who believes that he or she is buying an organic product and is instead buying a product with little or no percentage of organic ingredients (and that may even contain petrochemical raw materials). This is called greenwashing. Another common form of greenwashing is to launch a small percentage of organic products within a large line of conventional products, and thus confuse the customer, who will think that the entire brand is organic.

Currently, the only way to identify authentic natural brands is through private and independent certification such as NATRUE, COSMOS or Bio.Inspecta.

The fact that today there is no official European or international definition of natural product makes it more difficult for consumers to



distinguish a truly natural product from one that is not. The multitude of icons, logos and seals, with or without certification behind them, does not make it any easier and sometimes even professionals in the sector get confused.

Organic cosmetics are usually compared to organic food. However, consumers find it much easier to know where food comes from than finding out what a beauty product is made of and how it is manufactured. The lack of an official logo equivalent to the 'Euro Leaf' in the food sector, and the competition from the brands that practice greenwashing, are a real challenge for the genuine organic cosmetics sector. Furthermore, the recent approval of ISO 16128 does not help to reduce the current confusion.

Organic consumers are usually very loyal customers as they see buying organic products as part of their philosophy of life

In summary, a promising future awaits us as natural and organic cosmetics are in full swing. It is essential that we are transparent with consumers and inform them adequately. The future is in our hands. ■









Mark Smith, Director General at NATRUE | www.natrue.org

Natrue, leading international organic cosmetic sector

Mark is a British national with more than five years' experience in Scientific Management, and over the last ten years he has been involved in the successful coordination of strategic and collabora-

How the ISO Guidelines for natural and organic cosmetics could impact the natural and organic cosmetic sector?

Natural cosmetics are defined in very broad terms around the world. International market observers expect the core markets for natural cosmetics to grow between 8 and 10 percent each year now and over the next few years (source Vivaness). Private standards support consumers in identifying natural and organic cosmetics which have been formulated according to specific requirements and to differentiate them from the "nature-inspired" or "greenwashed" ones. In a study commissioned by NATRUE to GfK it emerged that over 60% of consumers are reassured by the presence of a label on natural and organic cosmettive interdisciplinary projects via academic departmental and international research. Mark became Director General in July 2016 after joining NATRUE in 2014 as scientific and regulatory manager.

ics. However the different seals still represent a problem for the average consumer who is not well informed about the specific requirements of each label.

To complicate even more the framework, in September 2017, the International Organization for Standardization (ISO) officially released Part 2 (ISO 16128-2:2017) of the guidelines covering the technical definitions and criteria for natural and organic cosmetic ingredients and products. Part 1 (ISO 16128-1:2016) was issued in February 2016, and now with this second part complete a producer can now freely use this guideline.

As outlined above, harmonised definition for natural and organic cosmetics has, so far, just been a dream



for many in the sector and for consumers alike. Proliferation of private standards meant growing challenges for consumers as part of their decision-making: they need to decipher and decide what a particular label means, and what its benefits are over another.

Without prejudice, NATRUE welcomed internationally agreed initiatives aimed at reducing complexity and barriers to trade with an emphasis on combating 'greenwashing', which is the reason why the NATRUE Label exists. Consumers must not be misled by products claiming 'natural' and organic' but this requires strict criteria to benchmark them.

That's why NATRUE engaged as a liaison representative within Working Group 4 of ISO TC/217: to be able to monitor and influence the process,











ORGANIC CERTIFIER ORGANIZATIONS / ORGANIC COSMETICS





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even if without the possibility to vote on the final outcome.

Unfortunately, the outcome of this international process, the ISO 16128 guidelines, has fallen short of current private standard's requirements, and there is no guarantee that products using it will be consistent with consumer expectations, especially within established markets such as the EU. The broad permissions and flexibility of approach as a guideline fails to combat greenwashing that, at heart, still misleads consumers, fragments the market place, and impacts those innovative producers of authentic products. As such, even if both are voluntary schemes, use of the ISO guidelines

cannot provide the same immediacy and transparency to reassure consumers and match their expectations as current private standards.

It should be remembered that the ISO guidelines are purely voluntary; their

availability does not represent an automatic change in the regulatory framework for natural and organic cosmetics. Countries might choose to adopt the ISO guidelines but there is no obligation.

For the time being ISO 16128 does not change the status quo and leaves space for products that continue, at best, or increase at worst, greenwashing. If a regulatory body were to adopt the guidelines directly in their current state the market would risk to be swamped with legitimate but "nature-inspired", as opposed to truly authentic products, thereby generating confusion amongst consumers and negatively impacting authentic

producers. To provide consumers with the products they expect, NATRUE advocates that any future regulatory procedure for natural and organic cosmetics, including an official definition or specific guidance for product claims 'natural' or 'organic', must be strict.

"NATRUE is the only association uniquely placed to represent the natural and organic cosmetic sector through its seat at the European Commission Working Group on Cosmetics. This privileged position allows us to directly participate and contribute to evolving legislation, like claims, and actively campaign to support initiatives that help the whole sector to progress and prosper without undermining consumers trust" concluded Dr Smith.

3 critical points overall regarding the ISO 16128 guidelines

As they stand, the ISO Guidelines do not improve the current status quo regarding greenwashing and differ from private standards in these three aspects:

General lack of transparency for consumers: the guidelines can only

be accessed by paying, but even if purchased, the guidelines alone will not clarify how they have been used in practice.

Permitted ingredient origin: Petrochemical and GM Plants

Petrochemical: Guideline users are not obliged to restrict the use of petrochemicals whatsoever. Consumers do not expect mineral oil to be in authentic natural products but ISO 16128 would allow it. GM Plants: Consumers do not expect cosmetic ingredients coming from sources like genetically modified plants (GMOs) to be permitted in natural and organic cosmetics.

Verification, control and identification of finished products: Part 2 of the guidelines provides calculations to determine natural or organic ingredient content; these can be voluntarily authenticated by certification. However, certification to ISO 16128 only confirms that the calculation was carried out correctly, as the guidelines have no benchmark to establish at what percentage content a product can claim or be considered natural or organic.■









Oriol Urrutia, Co-Editor, bio@bioecoactual.com

Jan Plagge, Bioland President Past, Present and Future of Bioland

Past, Present and Future of Bioland and the Organic Food Sector

What was the situation of agriculture in Germany in 1971 when Bioland was founded?

Actually the roots of Bioland are in Switzerland, thanks to initiatives as the school for farmers created by Swiss politician and farmer Dr. Hans Muller. In the name of food security the agricultural system had been industrialized and had become increasingly dependent on chemicals and on capital (external funding). As a consequence food quality worsened, soil fertility and biodiversity diminished, and the conditions of farm animals deteriorated. Soil degradation was observed as soon as in the 50s by conventional farmers who, together with Dr Muller, concluded that another way of producing food was urgently needed. Their priority was to find a way of producing food that was in harmony with the rules of nature. A balanced approach to farming that reconciled humankind with nature was found: that was the origin of Bioland. German farmers who went to this school realised quickly that they needed to get organised and to create an association where they could learn and exchange experiences about organic agriculture. Issues as defining organic farming and developing new ways of selling to consumers more independently were the roots of the name and the label Bioland. Bioland is

now one of the most popular labels in the German organic market.

How do you reach a consensus among eight National Associations + Tirol?

From the beginning Bioland has been a democratic grassroots organisation. Bioland farmers always wanted to be as independent as possible from external influences. Only by getting together, cooperating, and speaking with a single voice could they reach this independence in order to be able to practice organic farming. This experience is unifying. Nowadays we have more than 140 regional groups that discuss all kind of agricultural issues. These regional groups are integrated in eight regional associations. The chairman of each regional group and the chairman of each regional association meet regularly. All in all we have a strong professional way of making democratic decisions. The main decision is agreeing on the Bioland standards and rules, which means: What is organic today? What is Bioland today? What will Bioland be tomorrow? This, as well as our political activity in Germany and North Italy is what unite us. I would say that we are the strongest voice for organic farming in our regions and this is very important for our members.



Are you satisfied with the 10% growth in the number of organic establishments and the 12.4% growth of organic hectares in Germany in 2017?

Yes, I am personally very happy about the fact that last year over 70% of all farmers who went to join an association chose Bioland. Bioland is very attractive for farmers; the majority of new organic farmers want to be Bioland farmers. When we ask farmers what is important to them their feedback is definitive: they value above all our excellent advisory service. We have many advisers that cover every specific issue of organic farming. Additionally, our members rate very highly our good market access.

Between the global production of "conventional" meat of 229 million tons per year (unsustainable) and in vitro, laboratory or cultivated meat, what role does organic food play?

You will never produce artificial meat without causing a negative impact on the environment. You may produce meat in a lab, but the waste products and the way it affects our diets and our health are not without consequences. As human beings we face a big challenge: how can we devel-



op a balanced way of life that respects the other creatures on this planet? How can we learn and understand that material growth has an end?

I think this is the most important lesson we still have to learn: unlimited material growth is impossible - unless we discover another planet. Our main challenge is to develop an agricultural system and food business that can last for centuries. I do not think we are going in the right direction, as we are making our world more and more artificial. All artificial processes need more energy and resources than natural ones. This affects other areas of human life like landscapes, biodiversity, carbon emissions - and how we live with the other creatures. The only solution is a nature-based agricultural system that is adapted to the specific climate of each region of the planet and that is neither industrial nor artificial. My purpose is to develop a way of living that allows humans to live in harmony with the principles of nature.■



