

Food Futures

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Uncertainty, Complexity, Risk and Opportunity - The 'Glasshouse' Effect



More interconnected → greater uncertainty
→ less control → more risk → greater
opportunity

The mind of a fox

“The fox knows many things,
the hedgehog one big one”

Archilocus c.650 BC



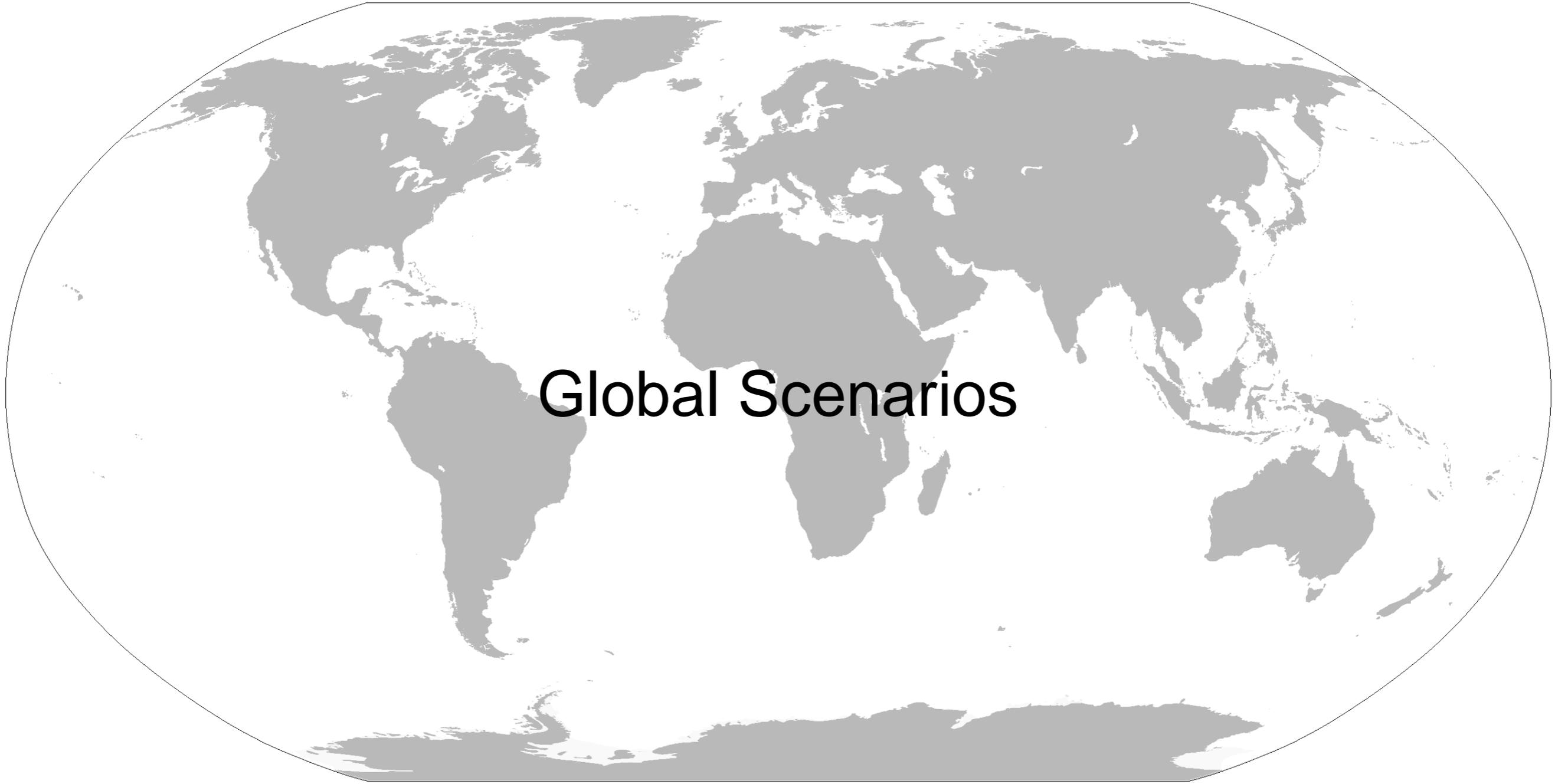
A dramatic, black and white photograph of a cloudy sky. The clouds are dark and heavy, with some lighter patches where light breaks through. The overall mood is somber and intense. The text "Rising Flags" is overlaid in the center in a clean, white, sans-serif font.

Rising Flags

Global Flags

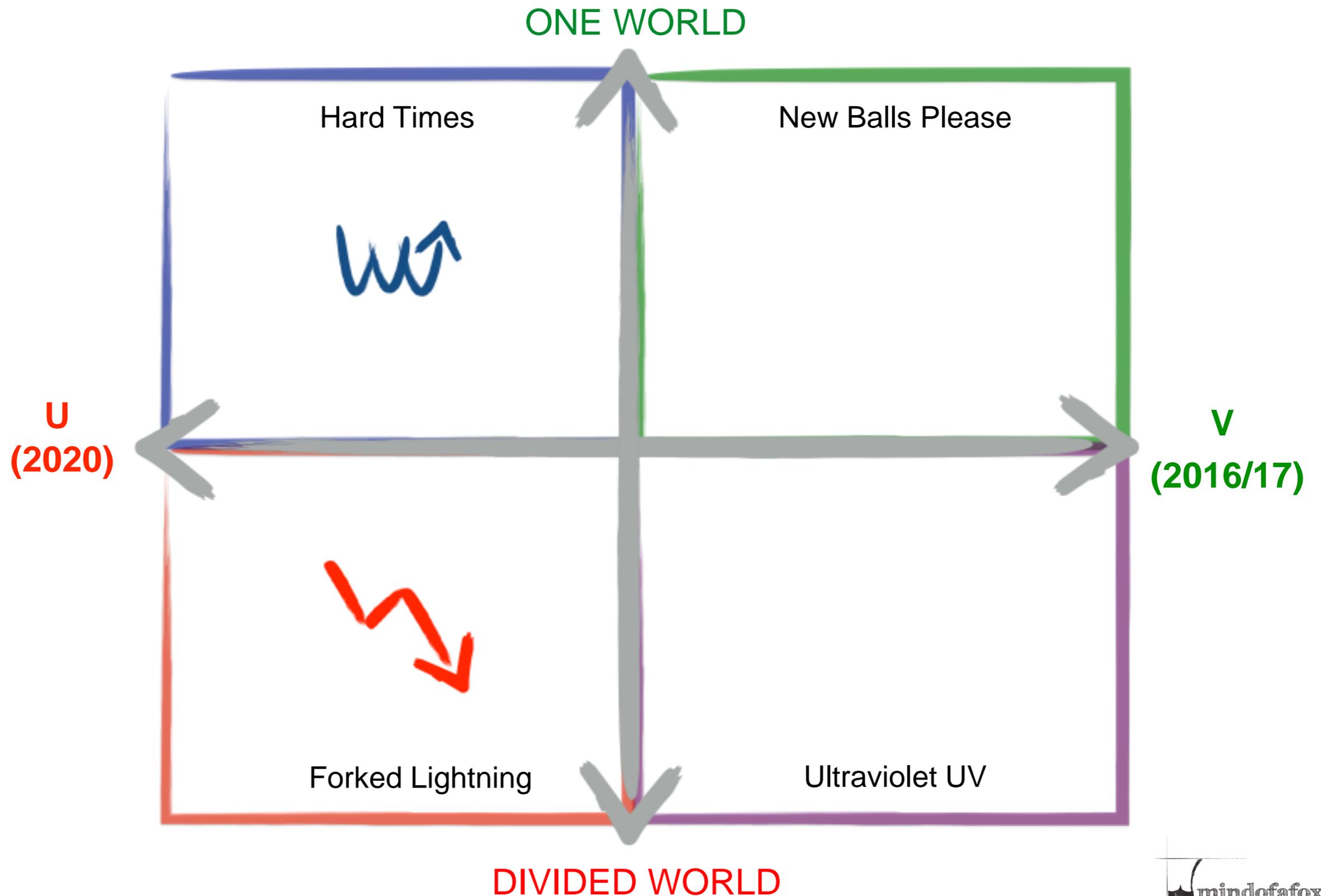
1. The religious flag
2. The red flag
3. The grey flag
4. The anti-establishment flag
5. The green flag
6. The national debt flag
7. The world-of-work flag
8. The porous border flag
9. The pandemic flag
10. The mining flag
11. The internet-and-cellular flag
12. The lifestyle-and-leisure flag



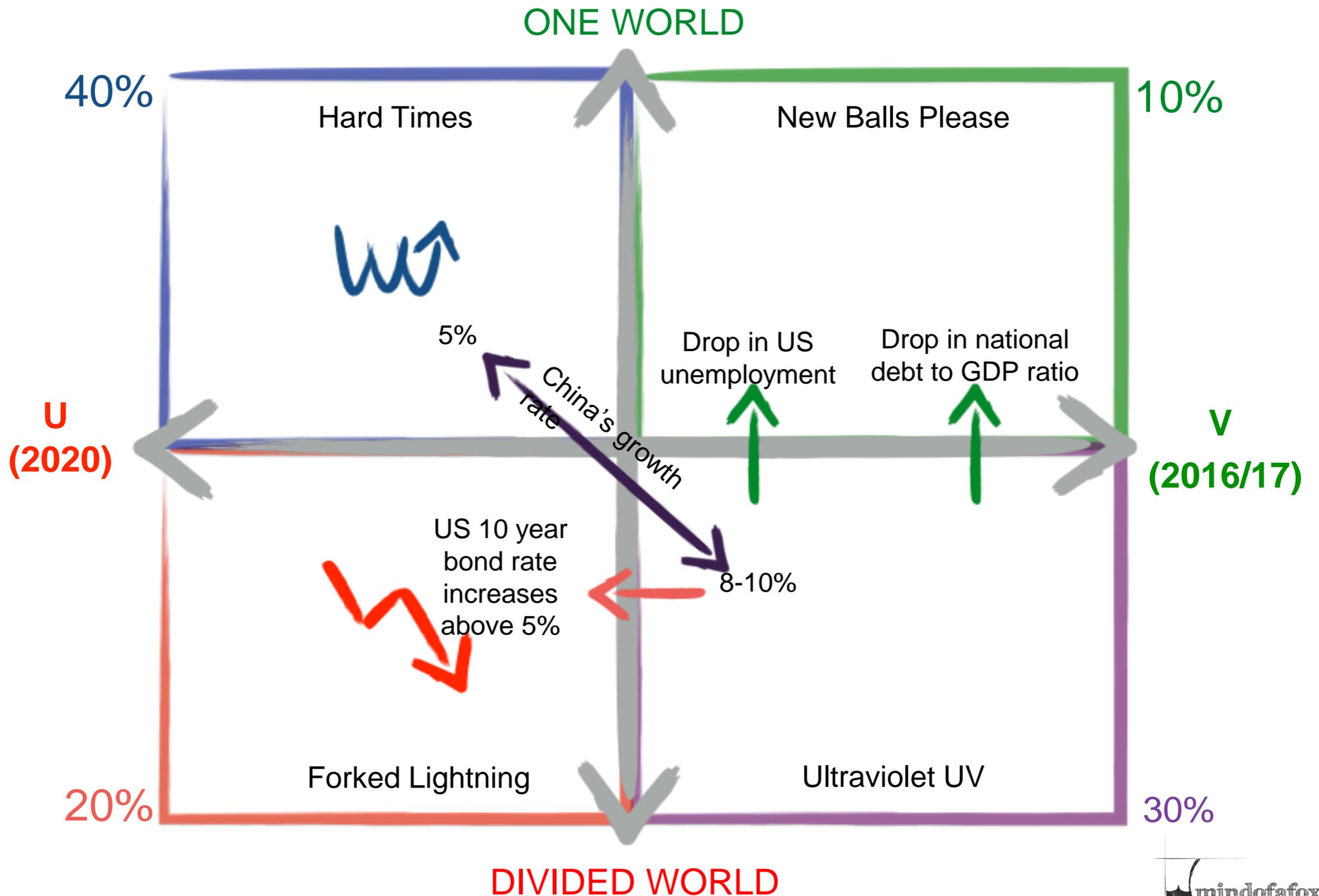


Global Scenarios

Global Scenarios



Global Scenarios



South Africa meandering down a path





South African Flags

South African Flags

1. Corruption and crime
2. Quality of infrastructure
3. Style of leadership
4. Pockets of excellence
5. Entrepreneurial spark
6. Independence of judiciary and other institutions
7. Nationalisation
8. Land ownership



South Africa Scenarios

South Africa Scenarios

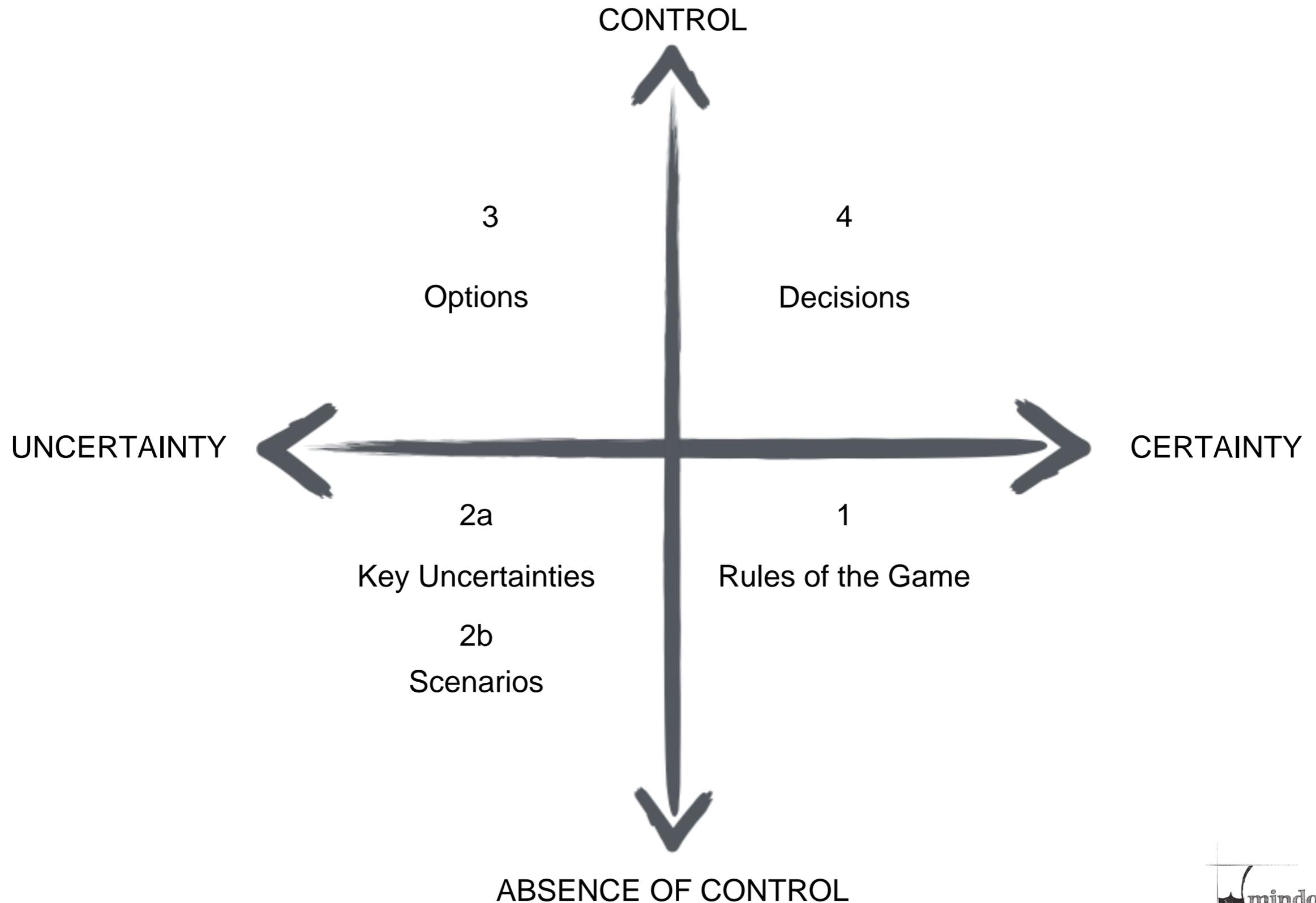


Characteristics of a winning nation

1. A good quality of education
2. A strong work ethic and spirit of entrepreneurship
3. A high rate of savings (and early access to capital for businesses that require it)
4. Adequate infrastructure to support a high-growth economy
5. Being an export-orientated global player that supplies goods and/or services to foreign markets that they can't get elsewhere
6. A dual-logic economy (big and small business work in constructive partnership)
7. Social harmony (citizens feel they are part of one team with a common vision)
8. Competitive personal and company tax
9. An attractive environment for foreign direct investment
10. Efficient government



The mind of a fox



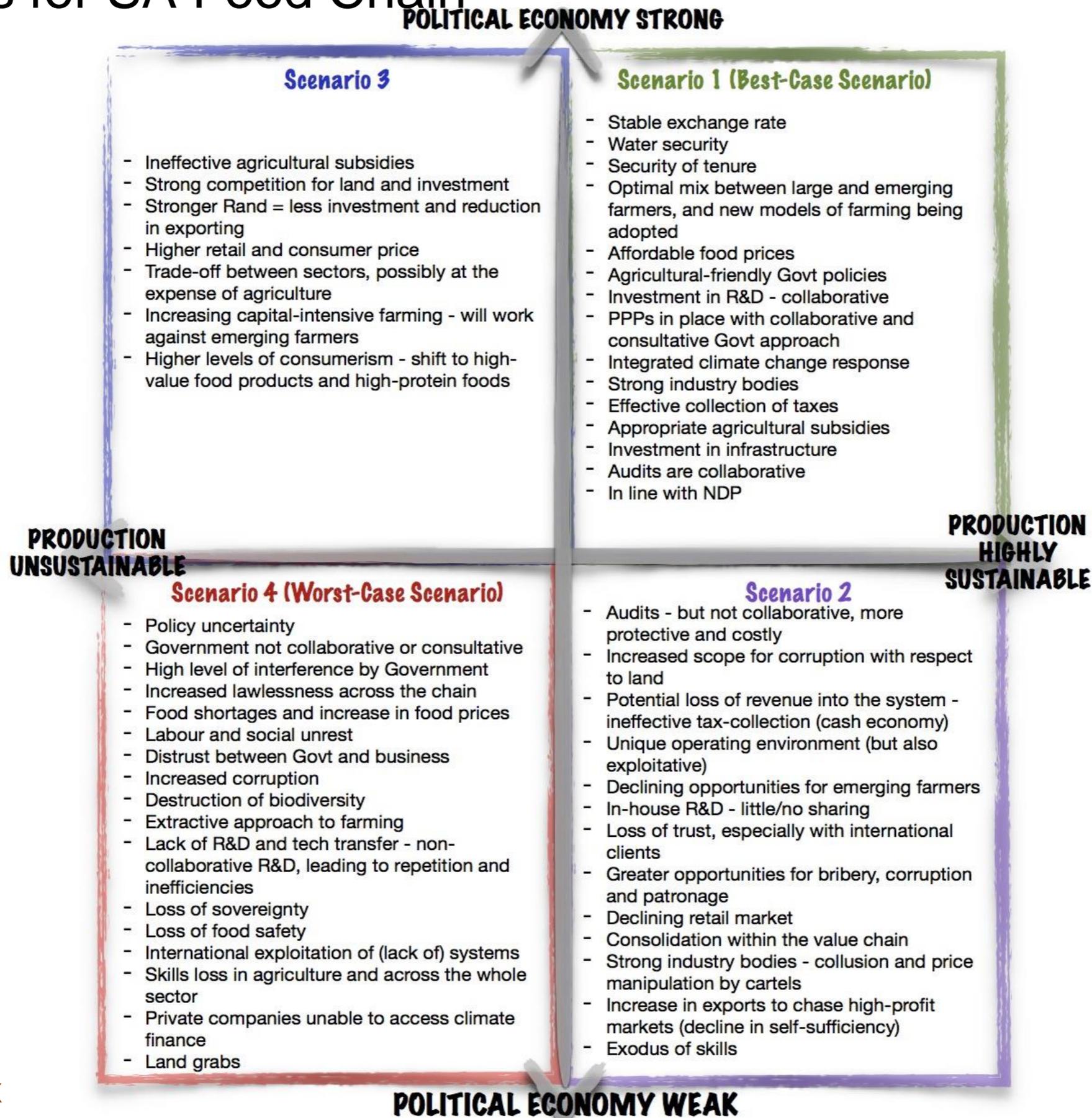
Certainties for SA Food Chain

Food security & nutrition	Natural resource base	Markets & globalisation	Food production	Political economy, policy & regulation
Demand for food is increasing	Average temperatures increase	Increase in uncertainty around supply, making planning more difficult	Growing uncertainty about how climate change will impact production	Growing uncertainty around food supply (food security)
	Ecosystem services need to adapt to the following: water supply, pollination, integrity of biodiversity, the soil, and the interplay of all of them	Smaller players in the value system find it more difficult to compete.	There is a growing reliance on mechanisation; growing investment in high tech	Land reform is changing food production patterns
	Resources that farmers rely on are finite and stressed.	There is greater volatility in global markets	Socio/economic issues: political pressures on farmers is increasing - theft and violence farmers labour pressures will increase	Increased erosion of social capital
			Nature of farming changing: farm consolidation as farming is now a commercial enterprise, ageing farmers, income streams are diversified	Urbanisation is increasing.
			Water: competition with other industries, more irrigation needed	Uncertainty of policy and regulation

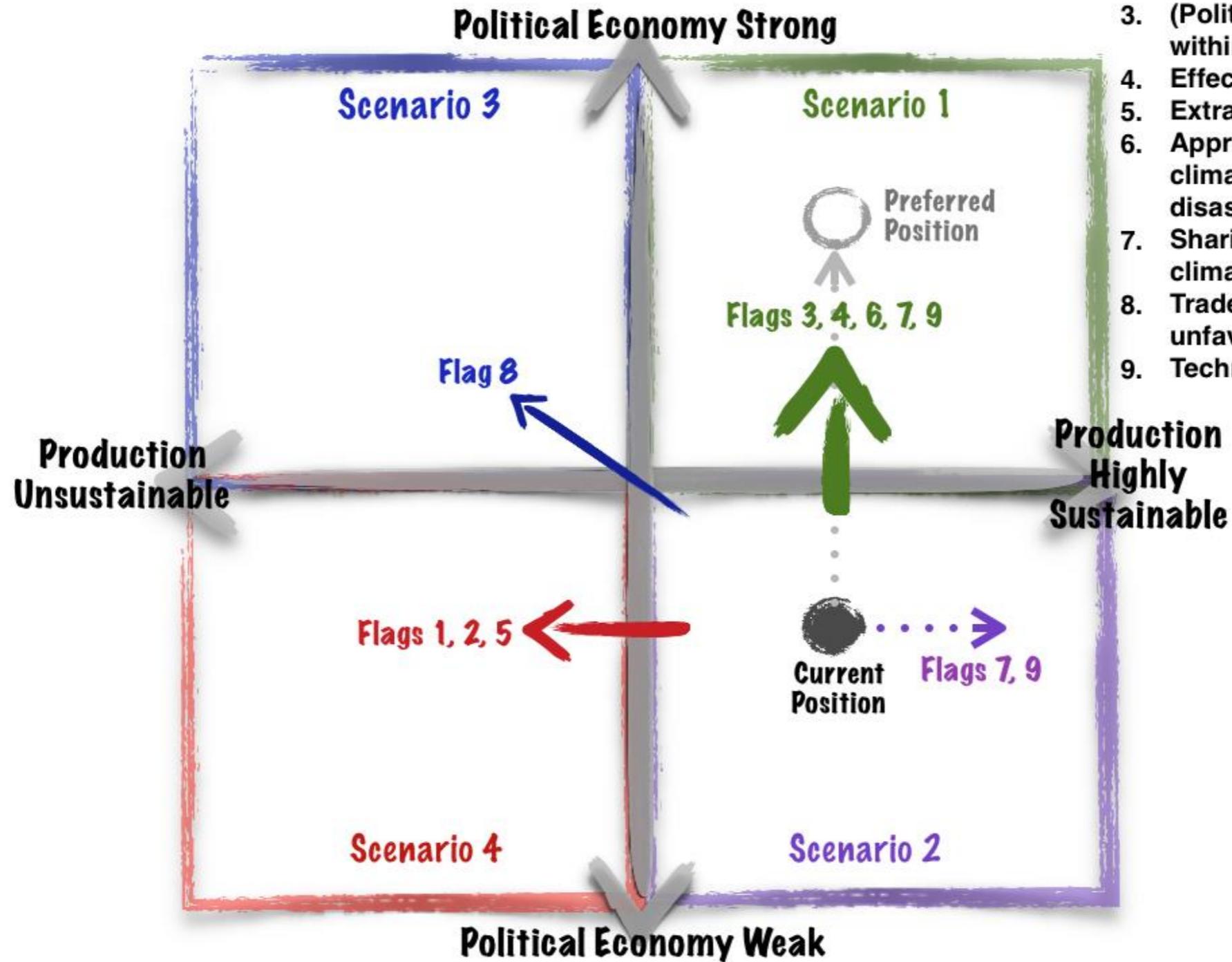
Uncertainties for SA Food Chain

Natural resource base	Food Security	Markets and Globalisation	Food Production	Political economy, policy & regulation
Extent /nature of the impact of climate change.	Changing consumer behaviour patterns	How will the markets respond to the major transitions i.e. oil price impacts	Impact of changes in the water quality & quantity.	Governance failure; Government's capacity to deal with increased complexity; preventing food fraud
Degree /direction of pest/diseases impact on the ecosystem services	Food security - what form it will take, what will be needed?	How will the exchange rate impact commodity prices?	The adaptive capacity of farmers: input costs	Labour uprising
Risk of agriculture to pristine land	Quality of food imports (especially nutrition)	Access to the export market	Technology use & skills development: biotechnology; influence of disruptive tech; future of agriculture research (sufficient to adapt)	Degree of investment in infrastructure
Level of trade-off required in resource allocation – i.e. allocation & management of water rights		How will the insurance industry adapt to the changes i.e. farmers need off-take agreements to secure finance, and insurance to ensure bank loans	Levels and impact of biosafety (food safety, phytosanitary, chemicals)	Level of trust (govt with private sector; within industries)
			Level of impact of lawlessness (illegal farming practices, food fraud, infrastructure theft)	Level of international collaboration or action on climate change

Scenarios for SA Food Chain



Current Position and Flags



Flags:

1. Business-Government engagement
2. Shift to junk status
3. (Political) transformation within the supply chain
4. Effective R&D
5. Extraordinary climatic events
6. Appropriate response to climatic variability and disaster
7. Sharing of information on climate change
8. Trade agreements unfavourable to agriculture
9. Technical adaptation

Thank you...and may the Fox be with
you



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