

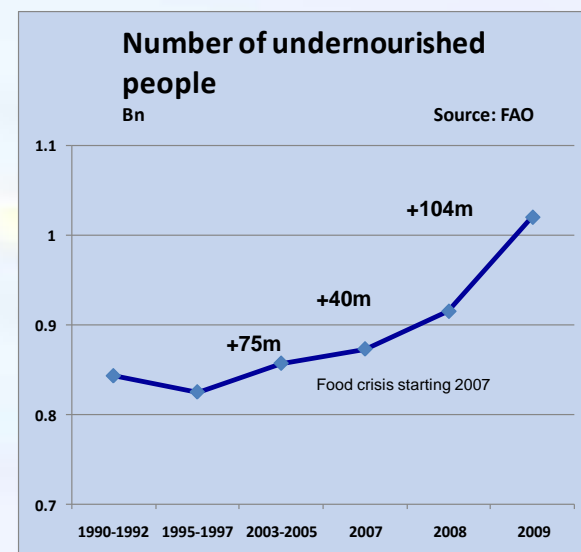
The Future of Agriculture in Europe - choose now under the new Regulations

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October 2009



Environmental challenges we face

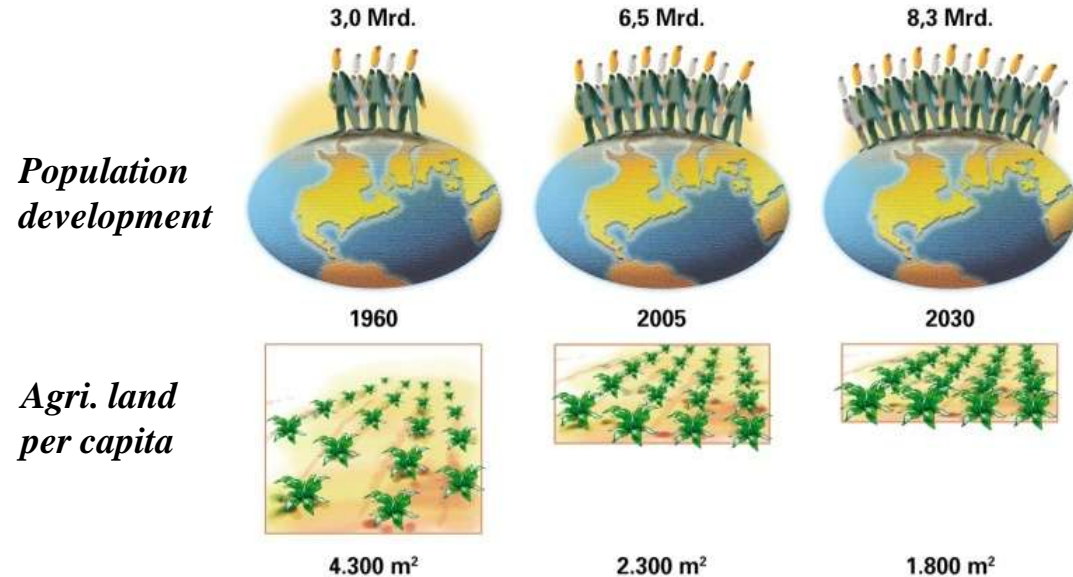
- ✦ Scarcity of water and energy (limited natural resources)
- ✦ Loss of agricultural land through increased urbanisation
- ✦ Loss of natural habitats in Europe that are of key importance for biodiversity
- ✦ Population growth set to reach 9 Billion people by 2050
- ✦ Farmland required to deliver more public services (biodiversity/food!)
- ✦ Climate change set to put further pressures on agricultural productions – putting crop reliability at risk (drought, flooding, increased pest pressures incl. alien species etc)
- ✦ Growing demand for food (income growth)



Agricultural challenges we face

- Secure supply for an increasing world population - food, feed, renewable resources and energy
- Produce affordable food
- Operate with limited agricultural land - natural resources
- Remain competitiveness at European level
- Secure the livelihood of rural communities
- Manage climate change - new challenges & risks for crop production & protection

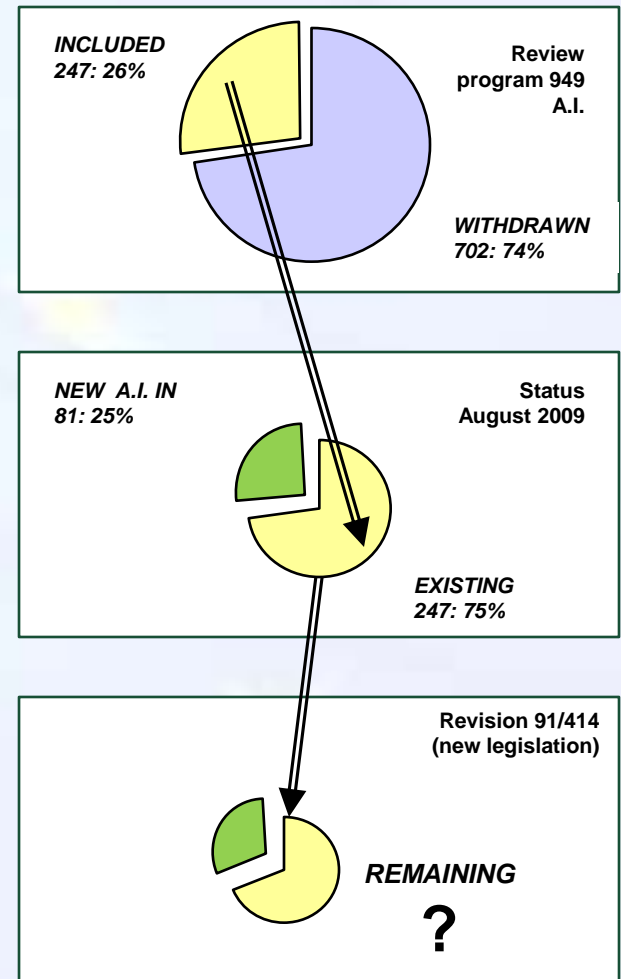
Arable land worldwide 1.5 Mrd. ha



*G8 Agricultural Ministers Statement (April 2009):
“More should be done to increase the quantity and enhance the quality of agricultural production and enable all citizens to have economic and physical access to safe and nutritious food”*

Review Process - A Serious Blow to Agriculture

- European farmers have already lost +70% of the substances previously available for use under the review process which existed *prior to the new legislation*
- Farmers now stand to lose not just additional elements of their pest management tool kit, but some of the most targeted, resistance fighting and, indeed, risk free tools

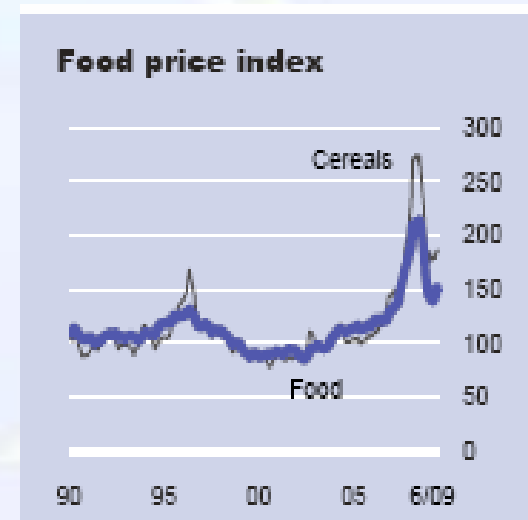


Review Process - A Serious Blow to EU Agriculture

- Need a clear regulatory process that can respond to emergency situations (ex: effective procedures to address new diseases, resistance issues) where solutions might work today, but no longer tomorrow
- Minor crops are at risk (further gaps with NO solutions)
- The major food crisis of 2007..2008

2000- 2006: World demand for cereals increased by 8% (mostly for industrial processes, such as biofuel production), cereal prices fell by 50%

Source :FAO 2008



Source: DeutscheBank Research

- **Impact unpredictable**
 - **Shift from risk to hazard based legislation**
 - **Endocrine criteria yet to be defined**
 - **Zonal concept (mutual recognition)**
 - **Comparative assessment**
 - **Minor use gaps (possible funds)**

Revision 91/414

Key considerations

- ✦ We risk that farmers will no longer have access to a complete range of pesticides and will therefore no longer be able to operate and deliver the crops that are required from them
- ✦ We risk that decisions will be taken that no longer ensure the viability and sustainability of farming as a whole (*example of non-sustainable organic farming copper² or ploughing in hill areas for weed control*)
- ✦ We risk that measures will no longer protect productivity
 - We need practical application of the derogation measures
 - We need to protect minor crops
 - We need to fight against resistance and new diseases



Framework Directive on Sustainable Use

Key Content

- **National Action Plans to reduce risks & impact and encourage IPM /alternatives to reduce dependence on pesticides (*those that remain*)**
- **Training for all professional users, distributors and advisors; incl. a training Certification system**
- **Inspection of (all) application equipment in professional use by 2016**
- **Prohibition of aerial spraying and permission by way of derogation**
- **Reduction of use or risk in specific areas. (eg: in areas used by the general public or vulnerable groups; protected areas under WFD, Birds and Habitat Directives, Natura 2000)**
- **Implementation of IPM principles by all professional users by 2014**
- **Harmonised Risk Indicators at European level. National indicators (existing or new) can be used in addition to harmonised ones**

Organic crop production is heavily promoted as being “the” solution

- Its trade-offs are not being factored in:**
 - Requires considerably more land**
 - Leads to further loss of natural habitat land**
 - Increases crop loss to pests**
 - Increases crop prices, leading to higher food prices**
 - Not viable for all crops, leading to further import dependency**
 - Presents considerably more risk of crop failure, hence financial risk**
 - Needs tax money**

Natural habitat land:

- 26.800 Natura 2000 areas
- (119,2 Million hectares land)
- 24.1 % of the whole land area of the EU 27

Source: EU Life 2008



Food security: the basis of Europe's Quality Of Life, the highest on the planet, with the longest life span

(Africa's comment on the EU legislation: How long do you want to live, anyway?)

- Adequate food supply
- Secure food supply
- Affordable food supply
- Nutritious food supply: fruits and vegetables the key to good health



Who determines which way we go ?



Aims to achieve the Sustainable Use of Pesticides / NAPs

- ✦ Focus needs to be on further risk & impact reduction during the use phase of plant protection products
 - ✦ Main goal of the Framework Directive
 - ✦ Registration of products covers risk assessment and products are considered safe for use
- ✦ Diversity in cropping systems requires a diversity of plant protection product solutions
 - ✦ Agriculture has to respond to many external factors (climatic, pest pressures, market fashions)
 - ✦ Resistance management
 - ✦ Implementation of IPM principles by ALL professional users

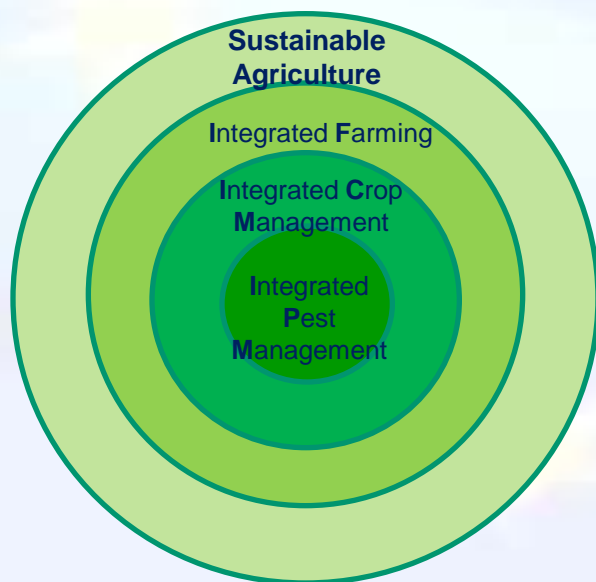
SUD - National Implementation – Key Considerations

The European legislation is a framework within which national measures will be taken to meet the objectives

- How the requirements will be addressed will vary from one Member State to another
- Key will be the different considerations factored in, ex:
 - Role of the national agricultural sector within the societal and economic country-level context
 - Economic and social consequences for rural communities
 - National agricultural sector-specific situations requiring specific pest solutions
 - New national policies setting new land management objectives
 - Nature protection areas under specific land management (species protection)
- **We risk that the sustainable use of PPP is not seen in the wider context of sustainable agriculture - being economically viable, environmentally sound & socially responsible!!**

IPM crop production offers a solution

- IPM offers opportunities to fulfil the goals of the SUD
- IPM offers a solution to fulfil today's needs without losing agricultures accomplishments
- IPM a holistic concept, part on Integrated Crop Management & Integrated Farming as the path for sustainable agriculture
- However, IPM implementation requires a full portfolio of effective, targeted, plant protection products to avoid resistance issues - as little as possible, as much as necessary



- ✦ We need science to be put back into policymaking for Europe to be able to meet the challenges ahead
- ✦ We need science and modern sustainable agriculture to protect natural habitats for stopping the decline of biodiversity
- ✦ Sustainable use of natural resources (soil, water, biodiversity) and maintenance of healthy crop-systems are key
- ✦ We need food safety and security



The crop protection industry is committed to innovation and is constantly working to improve its products and meet today's needs
The Framework Directive on the Sustainable Use is an opportunity for safe use, biodiversity and sound environmental practice

Keep the broader picture in mind

WFD

- National implementation
- Water protection measures
- EQs
- River basin management
- Use restrictions in sensitive areas
- Buffer zones

Revision of Machinery Directive

- Despite human safety - Environment safety standards

CAP

- Agri-environmental measures – national plans
- Buffer zones
- Cross compliance relevance of IPM

Sustainable Use Directive

91/414

- Availability of tools to allow implementing IPM
- Product registration incl. specific use requirements /conditions / restrictions
- May include advice on proper use according to IPM
- Monitoring of specific substances

Waste disposal legislation

Statistic Regulation

- Use & sales data collection
- Identification of trends (crop, product specific)
- Identification of priorities
- Calculation of indicators

Soil Directive

Bird & Habitat Directives & Natura 2000

National legislations & provisions



Thank You!

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