

Organic futures – a scenario game

By Hugo F. Alrøe, senior scientist, ICROFS

Theme

This issue focuses on the new *Knowledge Synthesis* from ICROFS on future possibilities and barriers for the continued development of organics in Denmark



In search of opportunities and barriers for the continued development of organics in Denmark, ICROFS arranged scenario games involving representatives from the organic sector. By way of four future scenarios, possible futures were pinpointed as a basis for the knowledge synthesis.

What are the opportunities and barriers for the continued development, growth and integrity of the Danish organic sector? This is the key question in the knowledge synthesis that the International Centre for Research in Organic Food Systems (ICROFS) has carried out for The Danish Ministry of Food, Agriculture and Fisheries during 2007 and 2008.

Four future scenarios

In order to answer such a question, we have to pinpoint the future, or rather a few plausible futures, because the opportunities and the barriers will depend on what the future course is, and because the development of organic agriculture is a very complex and heterogeneous dynamic process. We developed four scenarios for the organic sector in Denmark in 2020, which differed with respect to four critical and uncertain driving forces: changes in consumer preferences, the supply of organic produce, international competition and the capability for innovation in the sector. All the scenarios faced some equally critical, but quite certain driving forces: increased globalisation, global climate changes and rising energy prices.

The four scenarios are:



Representatives of organic processors. Photo: ICROFS

The projection:

Logically organic – the organic market is doubled in line with a projection of the present development

The global:

A world of a difference – the organic market is quadrupled based on a strong competition from abroad and high imports, while maintaining a very high consumer confidence

The regional:

An extreme spatial challenge – the organic market is quadrupled based largely on Danish produce with a high innovation pace and a very high consumer confidence

The collapse:

Once was organics – the organic market has dropped to one half of the present market due to a massive loss of consumer confidence.

Various actor strategies

In order to get a nuanced and realistic idea of what the scenarios mean in terms

of future opportunities and barriers, it is essential to investigate the strategies that organic actors follow. There are many different actors in the organic sector, who have different values and goals and different views on what organics is about, and who all influence the course of the sector to a larger or smaller degree. As a first step, three archetypical strategies of organic actors were formulated, the mainstream strategy, the alternative conservative and the alternative innovative, that were used as a tool to acknowledge and deal with the heterogeneity among organic actors.

Workshop with a wide range of actors

After the scenarios were formulated, a range of key actors from all parts of the sector were invited to a workshop on the futures of organics in April 2008. Seventy actors attended, including organic and conventional farmers; key persons from dairies, slaughterhouses, milking companies and other processors; mainstream and specialist wholesalers, retailers and financiers; people from catering, public kitchens and private can-

Summary of results

An English summary of results and recommendations from the knowledge synthesis can be found at <http://ecowiki.org/OekologiskUdvikling/EnglishInformation>.

teens; and representatives from consumer and trade organizations, together with journalists, representatives from the ministry, scenario consultants and the organizers from ICROFS.

The attendance confirmed the heterogeneity of the sector, and to further accentuate this point, the workshop started with an evening event, where three prominent international actors, each representing one of the three archetypical actor strategies, gave their view

on the future of organics: Nicholas Saphir, executive chairman for OMSCo, The Organic Milk Suppliers Cooperative, UK; Benoît van Ossel, managing director for the fruit company Les Coteaux Nantais, France; and Guy Watson, founder of Riverford Organic Vegetables, Devon, UK.

The evening dinner stroke the first note of next



Organic consumer representatives. Photo: ICROFS

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In this market, it is clear that we have to make long term contracts with the producers to ensure the volume

Henrik Rendbøll, Super-Gros, year 2020 in the Regional Scenario Game

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I live right next door to the national park, and in 2020 I have converted my farm to organics. I have bought all the land that I could get my hands on within the national park, since the land prices dropped to the floor. I have farm tourists, 250 heads of cattle and 500 ha out in the marshland. I make "Tidal milk" that is rich in micro minerals, in a concept production for Arla. I have eight windmills and all my technology is based on electricity

Mikael Nørby Lassen, conventional dairy farmer, year 2020 in the Regional Scenario Game

Photos: ICROFS



The participants of the scenario game tasted two various sets of dishes, one with Danish organic food (blue plate, all ingredients procured strictly within 100 kms of the conference) and one with organic food from foreign countries (white plate).

day's scenario game, as half of the quests got a global organic menu and the other half a local menu from within a 100 km radius. Next day at lunch, the menus were switched. After the dinner, the Danish minister of food, Eva Kjer Hansen, held an insightful speech where she expressed great hopes for the results of the work and outlined a vision for a more international future research in organic food systems.

The scenario game

The next day, the actors participated in a scenario game developed in cooperation with the EU Commission's Institute for Prospective Technological Studies (IPTS) in Seville, which was carried out here for the first time. It turned out to be a rich and inspiring day. The global and the regional quadrupling scenarios were played out, and the inputs were captured by eight notetakers.

The participants were divide into groups accor-

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Our joint operation is centred round a village. One has maintained his conventional pig production, but all the land has been converted. We have involved the citizens in the village in managing nature, establishing paths etc. And we have attracted several conventional farmers to this kind of operation

Lars Skytte, Dømmestrup, vegetable grower, year 2020 in the Regional Scenario Game

Photo: ICROFS



Discussions during the scenario games.

ding to their role in the sector (farmers, processors, wholesalers, retailers, investors, consumers and trade organisations). There were first introduced to the idea of scenarios, the scenario game and their part in the game. Their role was to "act themselves" in the year 2020, and try to figure out and explain how they as farmer, buyer, consumer, etc. would react in the organic market that was described in the scenario.

Each game started with a presentation of the scenarios that placed the participants in year 2020. Then they were asked to discuss some basic questions within each group: What were the challenges of getting here? What were the strengths in 2020? And what were the weaknesses? After this, the groups presented their viewpoints in plenum and reacted to the statements of the other groups in a structured debate and exploration of opportunities.

After the initial discussion, the participants were faced with some key dilemmas: business versus

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We want to congratulate the sector, because this is really a success which we want to be a part of. It seems like a good business and there is a coherent business plan behind production and sales

Poul Erik Jørgensen, Nykredit, financier, year 2020 in the Regional Scenario Game

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Organics is not a train that runs and which you can just jump on – we are the actors, it is us who are going to move this train. We must create a common consumer policy platform for how we want organics in Denmark to develop

Brian Skov Sundstrup, FDB, consumer representative, in the Global Scenario Game

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Our largest challenge is to develop our growth potential by making all the inhabitants of the country, indeed all the inhabitants of the world, ambassadors for the movement that organics has been, and which it must continue to be.

Therefore we made our biggest challenge our biggest strength, and as early as 2008 we hired our first communicators. We established a large communication business where people could come and see how our farm worked and how we developed, and made the development much more important than how big we had become.

It was a huge success, and in no time it became clear that quite a lot of people had the energy and the passion to be a part of the project.

They were willing to pay to get close to a farm and become part of it and be allowed to be a part of the development of Danish agriculture. What we thought would cost us money turned out to be part of a movement, because we opened our doors and gave the consumers an opportunity to influence our evolution

Svend Brodersen, Gram og Nybøl, year 2020 in the Global Scenario Game