



Highlights Experts Sessions

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Expert sessions

Visions of five expert groups



Technical
suppliers

Growers
Propagators

Consultants
Researchers

Trade
Organizations

Influencers
Stakeholders



Technical suppliers

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Reactions and future themes

- Sustainability is key, with water being the most important theme
- Increasing demand for transparency
- 'Cradle to cradle' and 'local for local' concepts
- Overall: NL is already frontrunner, but unable to communicate the successes well enough to the outside world

Approach and conditions

- More proactive and demand-driven innovation needed
- Integrated approach / way of thinking
- More collaboration
- Speed of innovation can slow down in favour of creativity and collaboration

Growers & propagators

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Reactions and future themes

- Profitability
- Important that we maintain a front position
- Difficult to focus on one theme
- Clean and efficient production with more flexibility, food safety
- High-tech is needed, but difficult to explain to the consumer

Approach and conditions

- Careful approach:
 - High tech growers are already far ahead
 - Extra investments are not paid and risks are getting bigger
- New way of innovating together with shared risk taking
- Communication to the consumer is key. How?

Consultants & researchers



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Reactions and future themes

- Organization, communication and politics hold more limitations than technology
- Energy and water remain most important research themes
- More integration of knowledge on 'hard' technology with plant and root zone knowledge

Approach and conditions

- Clear legislation and transparency (measurements)
- Responsibility not limited to the innovators
- More integrated thinking:
 - Between the knowledge areas: system innovations
 - Horticulture in relationship to society
- More long-term strategic thinking and innovation
- Who holds the lead?

Trade organizations

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Reactions and future themes

- Whole chain has to join
- Agree on important themes: sustainability (water), transparency (footprint)
- Pesticides remain an issue for consumers

Approach and conditions

- High-tech should be communicated as a solution and put in the broader perspective of world challenges
- Chain has to work together based on a joined future vision
- Thinking from consumer perspective
- Reorganization needed?

Influencers & stakeholders

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Reactions and future themes

- Sector is willing, but more credits needed
- More research needed in cultivation technique to obtain full profit out of technical developments
- Accurate, controlled growing
- Water is a chance for high-tech

Approach and conditions

- More and different ways of communication: balance between high-tech and consumer emotions
- Transparency / evidence
- Strengthen link horticulture within the society
- Efficiency is our strength and the challenges are our chance

Doing 'more with less' ... in a better way

- Use strengths of efficiency and high-tech
- Continue high-tech developments at known areas: energy, CO₂, water
- Integrate plant / root zone / climate knowledge
- More transparency (measurements)
- Controlled growing:
 - Decrease use of materials
 - Increase production volumes
 - Matching environment with profitability



Today's reality: Innovative sector...

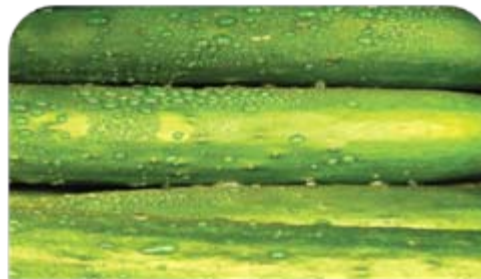
- Successful innovations are quickly implemented:
 - Good for end user
 - But also work as 'brake' for innovators who keep their advantage for a relatively short time, although costs of investments are relatively high
- Cause: most horticulture markets are commodity markets:
 - Many providers and little differentiation in offering



... and not so innovative sector

- Commodity markets have few product innovations
 - taste
 - health
 - and good behaviour / sustainability
- Lots of providers and little differentiation in offering:
 - Low margin for investment in innovations
- Although there is a lot of innovative ‘pioneering’ caused by the entrepreneurial mentality, this is often not linked together

} Opportunities for premium



Changing consumer preferences

- Health & good behavior:
 - Safe, clean production
 - Sustainable production
 - Increased transparency
- Enjoy & easy: route to market
- Cheap
- Communication is key



Horticulture 2.0

- High-tech greenhouses that produce tasty, healthy, varied products in high production quantities, which:
 - Use minimal resources
 - Re-use
 - Emission free growing
 - Residue free
 - Know exactly what to do
 - And are fully integrated into the environment / society



Approach



Re-shaping the horticultural sector to ensure long term profitability

- Precision growing for sustainability and profitability
 - Continue developments on high-tech themes
 - Integrate plant / root zone / climate knowledge
 - Find new ways of collaboration and shared risk taking
 - Make processes fully transparent – know exactly what to do
- Route to market
 - Proactive, consumer driven innovation
 - One vision & integrated approach for strategic themes
 - Be connected: to the consumer and to the society
 - Take responsibility as a sector
- Remaining question: Who takes the lead?