

Top Trends, Challenges and Issues for the AgChem Industry

Issues Tracking & Stakeholder Research

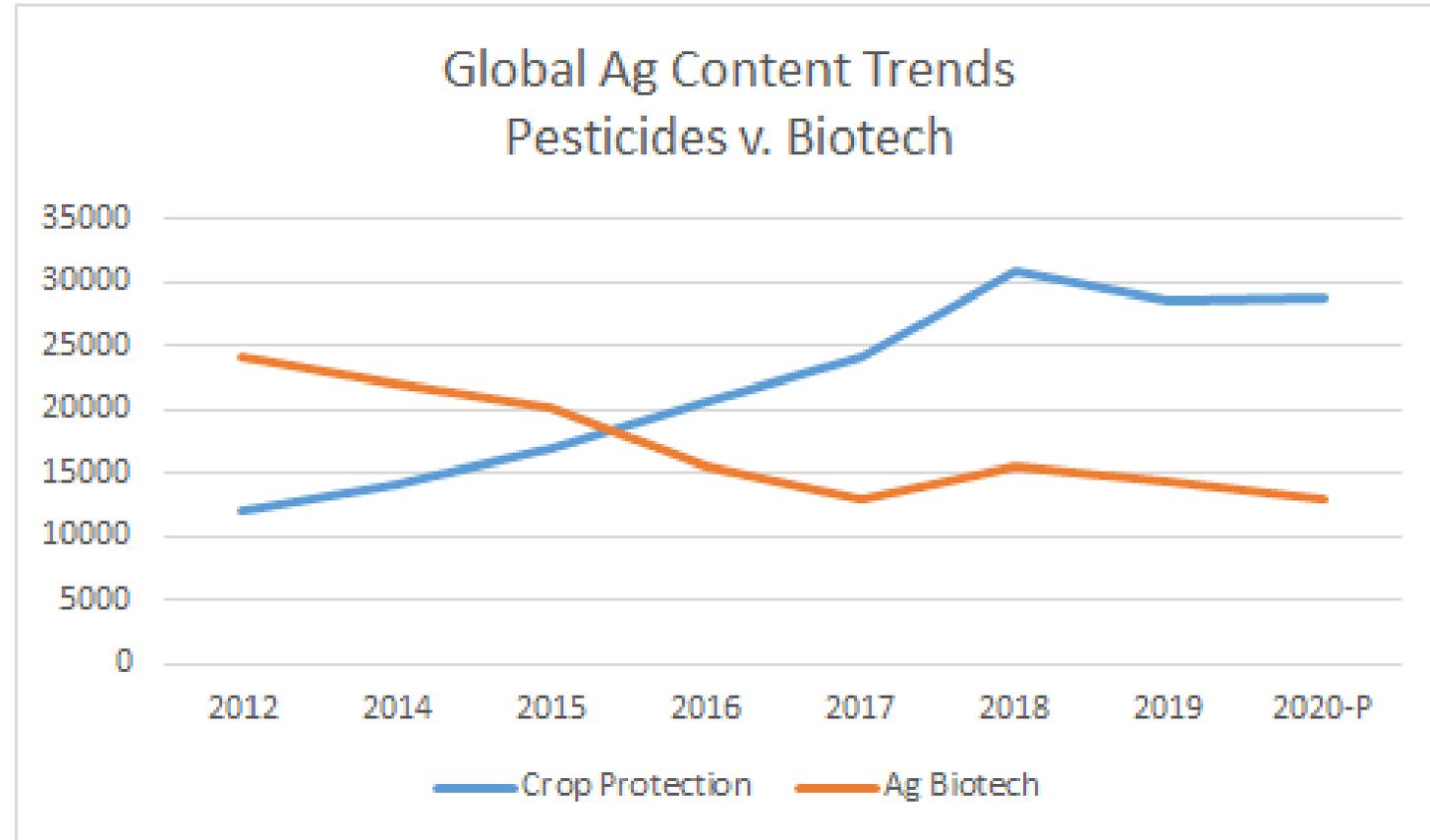
Winter 2021

The environment today

- ▶ Globally coordinated, well-funded **anti-conventional agriculture campaign** seeded in 2008-2009, **launched in 2012** and which has **extended to 2020+** merging with growing anti-US and anti-capitalism sentiments to disparage non-organic, 'big ag' and technology-linked production systems
- ▶ **Initial individual focus on GMOs, antibiotics and pesticides** integrated with **broader anti-ag and anti-corporate themes – most intense global advocacy levels in 20+ years**
- ▶ Emerging "agroecology" and "regenerative" advocacy models **opportunistically partnering with political (Europe-driven) and business (organic) stakeholders** who profit or benefit from disruptions in food security

Issue tracking trends reveals an existential threat to ag chem

- ▶ **Clean Food, Political Food** movements pushing input/chemical-free farming (agroecology, regenerative, zero-budget)
- ▶ Power, profit & political sources driving conversations:
 - ▶ **Power**: Anti-corporate, eco & alt-farming NGOs (\$500M)
 - ▶ **Profit**: Organic, natural product industries and litigators (\$100B)
 - ▶ **Politics**: Disruptors using food as a weapon (Russia, EU Green parties, Qanon US, far-right/far-left shared conspiracy claims, etc.)



The combined top ag-issue global topic trends

▶ #1 Crop protection

- ▶ Human health (glyphosate, herbicides & EDCs)
- ▶ Pollinators (e.g., neonics, bees, **biodiversity**)
- ▶ Note: 34% CP reports intersect with water quality

▶ #2 Biotechnology and NBTs (plant and animal - 10% incl. water)

- ▶ **Conflation with pesticides** (glyphosate) 35%+ globally (15% in Africa)
- ▶ Non-GMO marketing trends
- ▶ NBTs, gene editing and synbio

▶ #3 Animal health and productivity (12% incl. water - not a major advocacy focal point in Africa)

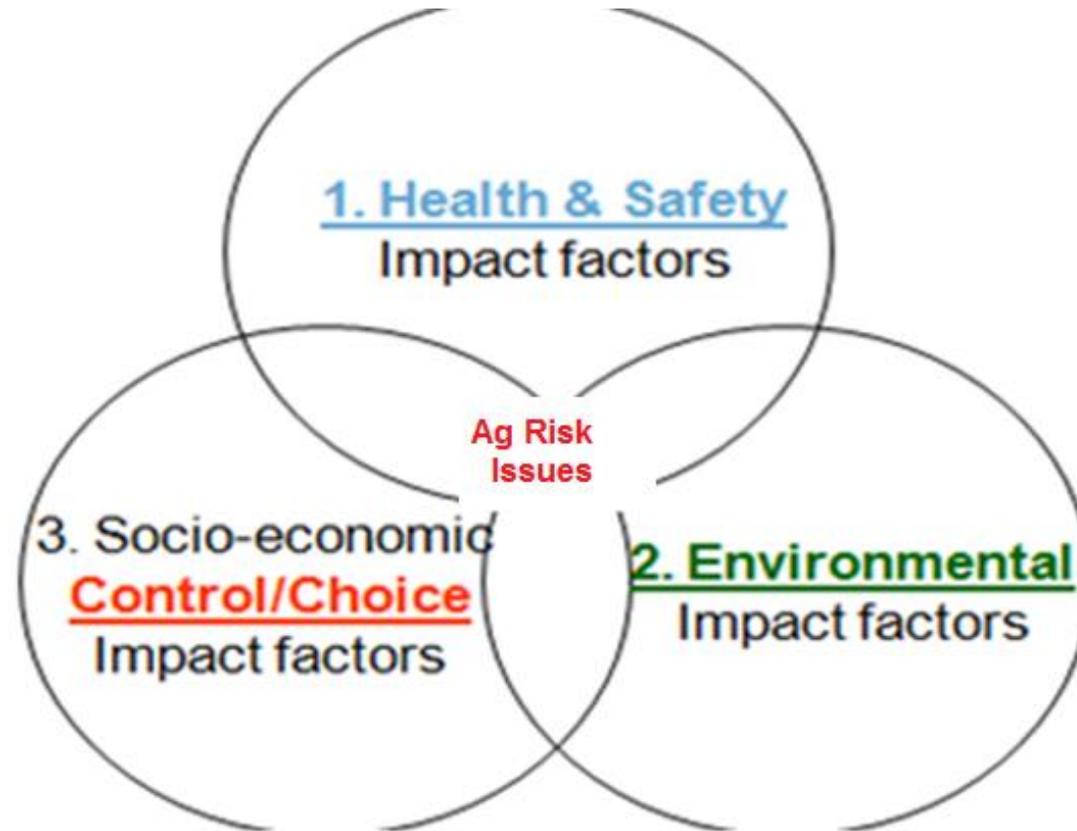
- ▶ Alleged contributions to **climate change** top issue followed by antibiotic use
- ▶ Trade challenges on hormones, chlorine, **GM feed** on the rise
- ▶ Animal care mostly opportunistic and temporal
- ▶ **Animal biotech** (gene editing)

▶ Other intersecting trends:

- ▶ **Water quality** - 3,500+ percent increase in volume since 2015
- ▶ **Clean food** (organic) - completed shift from niche to mainstream, organic **evolving to regenerative advocacy**
- ▶ **Political food** (**agroecology / regenerative ag** and trade) - growing influence - particularly via IGOs, EU gov'ts
- ▶ Adoption of anti-pesticide, anti-GMO claims in broader anti-vaccine, 5G, and **anti-corporate/Qanon conspiracy** claims

Themes

- ▶ Human Safety
- ▶ Environmental Risks
- ▶ Socio-economic harm



Traditional science & regulatory support only covers the health and environmental areas - socio/econ challenges require political cover support. In current anti-corporate, conspiracy environment independent, diverse third parties required for all

Tactics: Villains, Victims & Heroes + Urgency



Villain: pesticides & industrial ag
 Victim: humanity (extinction)
 Heroes: politicians who ban pesticides

PREMIUM
 An insect apocalypse will be everyone's apocalypse

Michael S. Engel

PUBLISHED MAR 4, 2019



The National Butterflies and Moths Conservation Society has been working to protect the butterfly bush land along the coast, where countless other insects are also found.

The Trump administration has announced plans to destroy it. But such a move would seem almost a luxury in a world where insects are essential for life.



OPINION

THE WALL STREET JOURNAL
 — **Putin's Disinformation Matrix**

The Kremlin's English-language TV organ offers Britain its signature blend of propaganda and tinfoil-hat conspiracy theorizing.

FORTUNE

HEALTH • ENVIRONMENT

Insects Are Dying Off at a Scary Rate, Putting Humanity at Risk

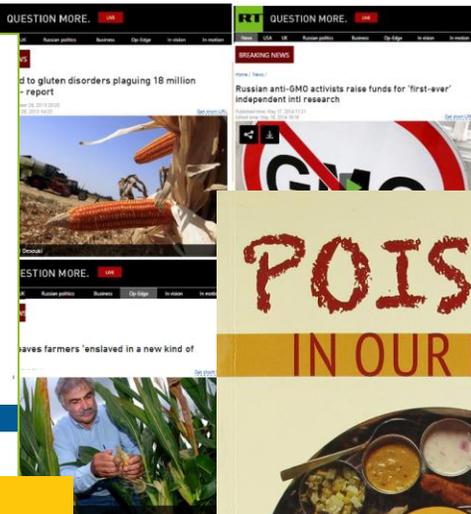


Study Predicts Demise of Insects within Decades if Pesticides Continue to Proliferate

AgriFood Digital Economy & Jobs Energy & Environment Global Europe

Environmentalists call for pesticide ban as study shows extent of insect decline

By Samuel White | EURACTIV.com



More than 1,000 anti-GMO stories published in RT Russian state sponsored

POISONS IN OUR FOOD



Links between Pesticides and Diseases

Dr. Vandana Shiva, PhD
 Dr. Mira Shiva, MD
 Dr. M. Suresh Kumar, MDS

Global advocacy intersecting with India chemical industry freedom to operate

- ▶ Russian disinformation sources
- ▶ European Green advocacy
- ▶ North American anti-trade interests
- ▶ Other foreign NGOs
 - ▶ Pesticide Action Network
 - ▶ Greenpeace
 - ▶ La Via Campesina
 - ▶ Third World Network

RT QUESTION MORE

Dr. Vandana Shiva on India's farmers protests: Indian farmers are victims of food imperialism (E976)

13 Feb, 2021 07:57



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NEO
New Eastern Outlook

15.02.2021 Author: F William Engdahl

The WEF Agenda Behind Modi Farm Reform

Column: Economics Region: Southern Asia Country: India



Stop persecution of Indian farmers, activists opposed to ecologically destructive Farm Laws

Global Day of Solidarity with the Indian Peoples
February 25, 2021 in Media



Published on Friday, February 19, 2021 by Common Dreams

US Farmers and Food Justice Groups Declare 'Solidarity' With Indian Farmer Protests



Near term urgent challenges

▶ Ongoing **IARC monographs 2020-2025 cycle**

- ▶ Current round of prioritized agents/issues includes: atrazine, chlorpyrifos, pyrethroids, alachlor, mancozeb, terbufos, chlordecone - to extend to 2024
- ▶ Lack of effective member state involvement and challenges

▶ Expansion of **U.S. toxic tort litigation model (global tribunals)**

▶ **EU gov't exporting GREEN DEAL, agroecology and precautionary principle** -based trade agreements and IGO convention policies which exclude pesticides, modern crop protection and seed breeding techniques from multinational policy making

▶ **U.S. political transition** - shift of power in U.S. executive and legislative branches may elevate previously fringe-left anti-pesticide/anti-corporate agribusiness policy agenda and legislative items; defining ag role in climate (pos/neg) on agenda while Qanon, Alt-right claims open alternative front risks

▶ EU, US and IGO progression with advocacy and marketing interests on defining and implementing regulations on **endocrine disrupting chemicals** and “chemical cocktail” exposures (Endocrine Society, Ramazzini, NIEHS funded EU research, et al)

▶ EU **maximum residue limits (MRLs)** for pesticides (major growth in testing for residues in foods, animals, water and people) (banning exports of chemicals and imports of foods grown with chemicals)

▶ Growing **anti-corporate** allegations of corruption and “**greenwashing**” claims around risks “**green chemistry**” solutions involving biological alternatives coming from corporate-driven gene editing, biocides. Indigenous owned resource exploitation, etc.

- ▶ Merged with growing allegations of “**human rights abuses**” by private sector
- ▶ Criminal and conspiracy claims amplified by Russia and other political sources
- ▶ NGO and socio-political groups calling for multi-national agribusiness break-ups

Thank you

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<http://community.bonuseventus.org>

