

Agriculture's Global Challenge: Feeding More People Sustainably



Daren Coppock, President & CEO
Agricultural Retailers Association
National Agronomic Environmental Health & Safety School
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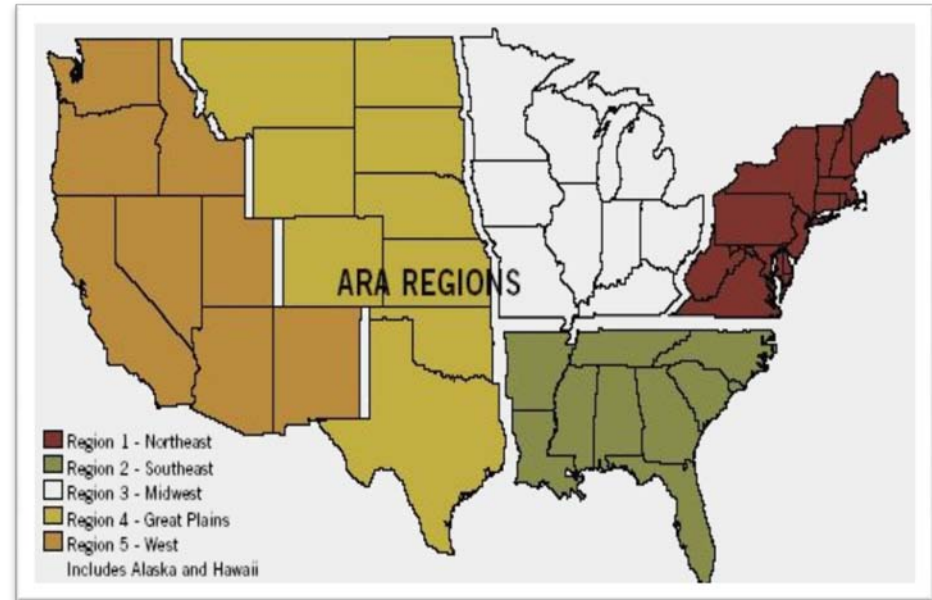


Who Is ARA?

Suppliers to America's
Farmers

Over 6,500 agronomy retail
and distribution outlets

Over 75% of all Crop inputs
sold to America's farmers.



ARA advocates, influences, educates and provides services to support its members in their quest to maintain a profitable business environment, adapt to a changing world and preserve their freedom to operate.

Regulatory Issue Snapshot

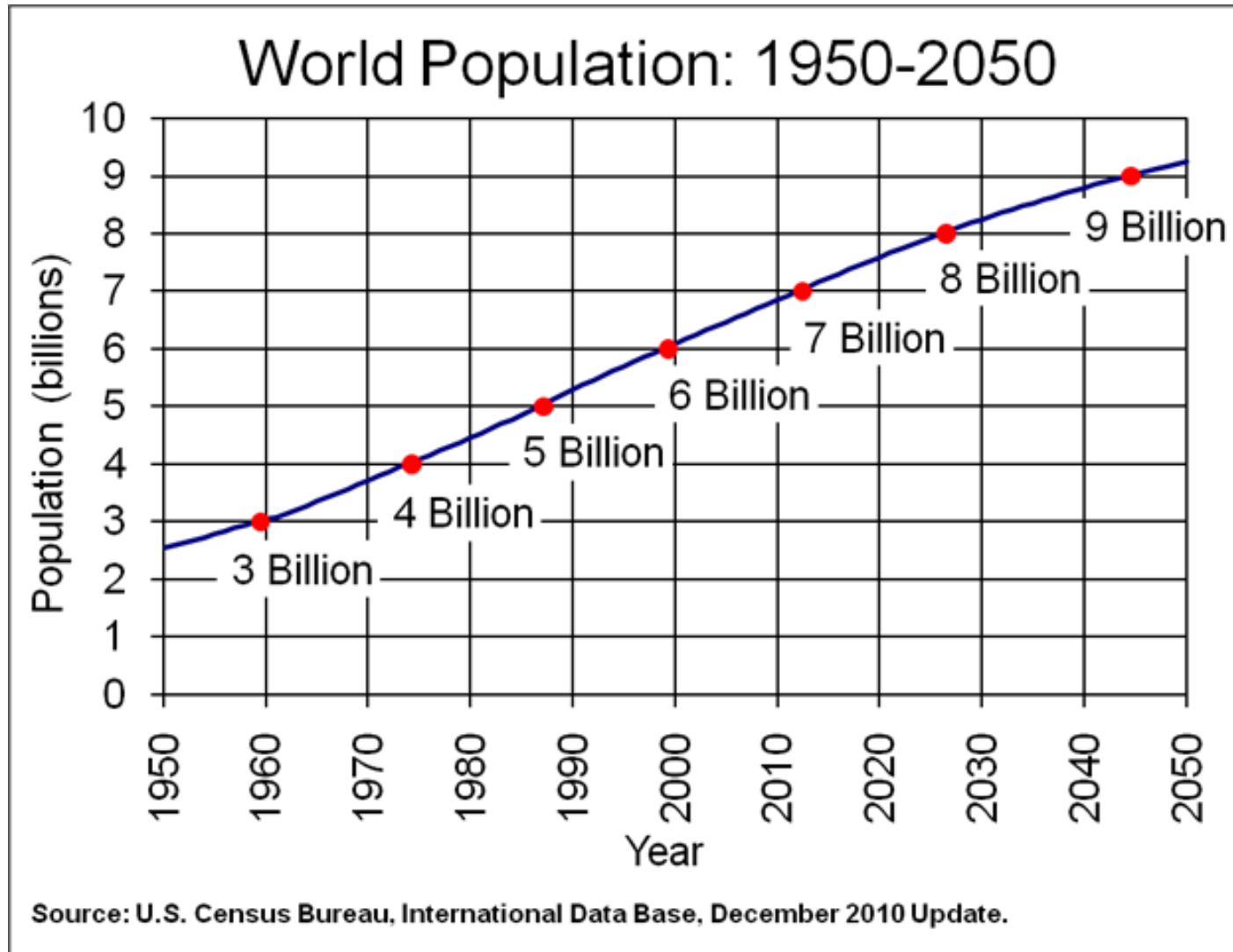
- **Security**
 - Personnel Surety, CFATS reauthorization, Chemicals of Interest
 - Stupid Example #1: Diggers Hotline
- **Transportation**
 - Stupid Example #2: Hours of Service Ag Exemption
 - Implements of Husbandry, NH3 Nurse Tanks and common carrier
- **EPA**
 - NPDES permitting, Container & Containment, SPCC, Nutrient TMDLs, Spray Drift, Atrazine, Web Distributed Labeling
- **Major distractions**
 - Debt limit debate
 - 2012 election posturing



Agriculture's Global Challenge:

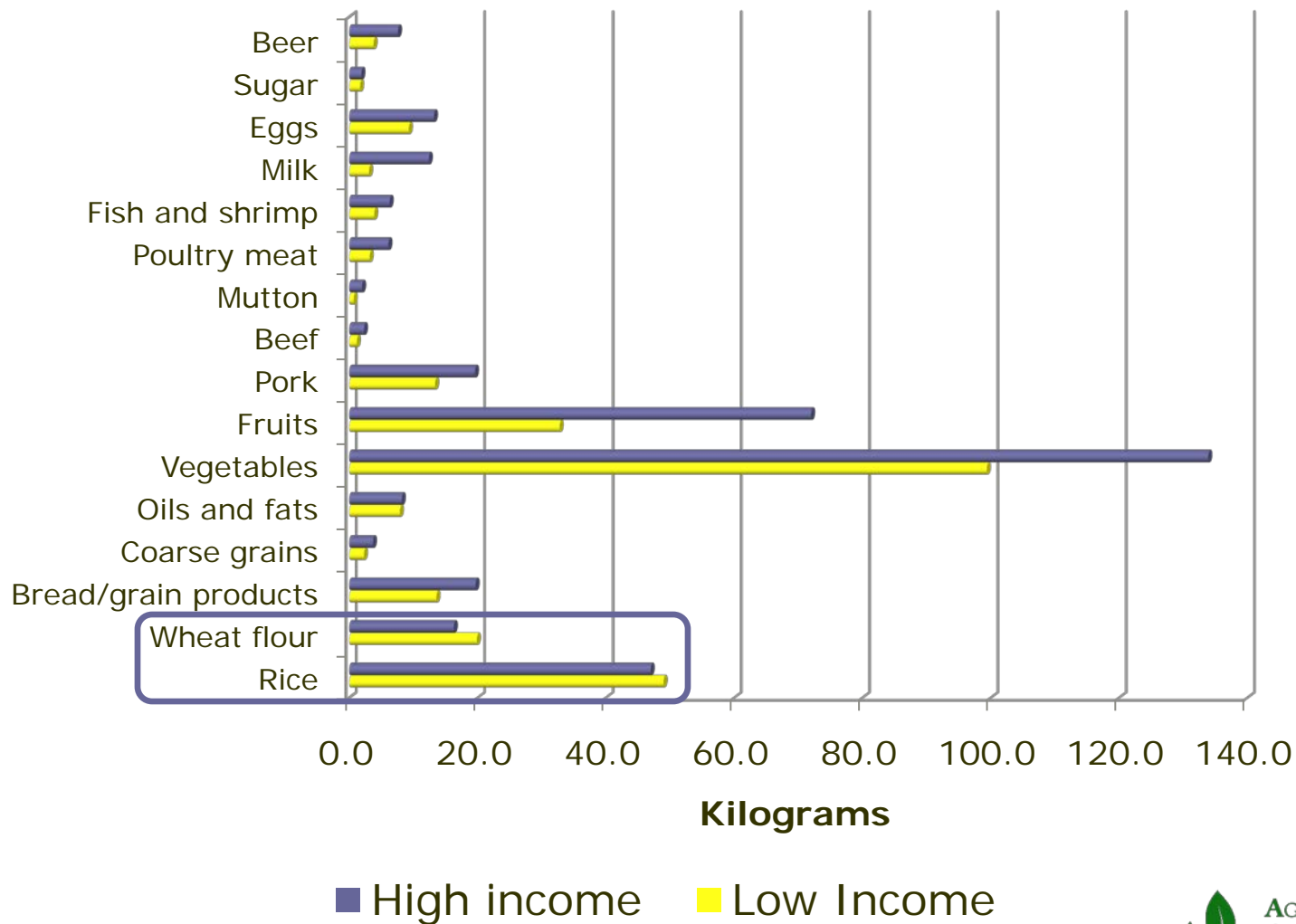
How Do We Sustainably Produce Enough Food to Feed 9 Billion People in 2050?

Demand: Global Population

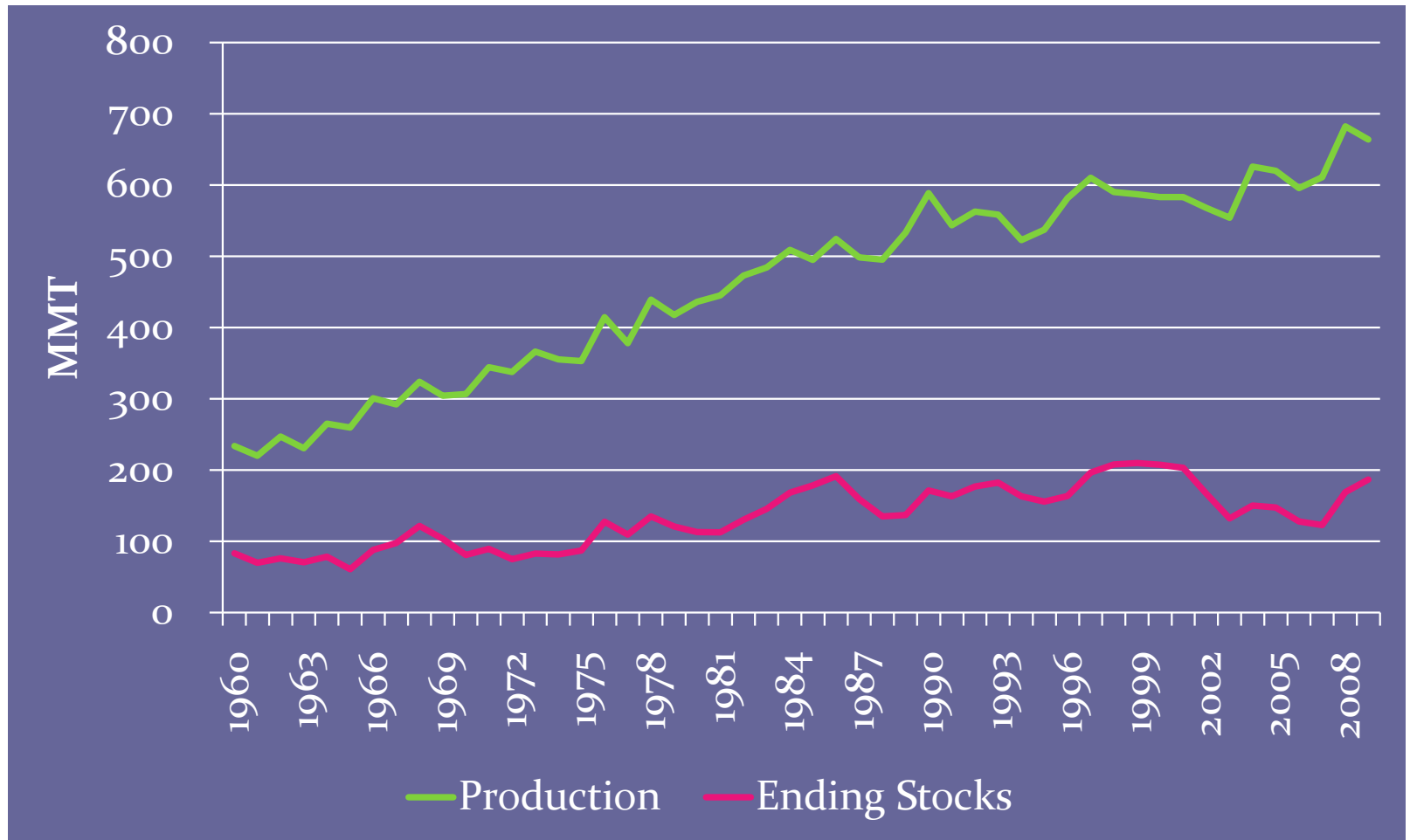




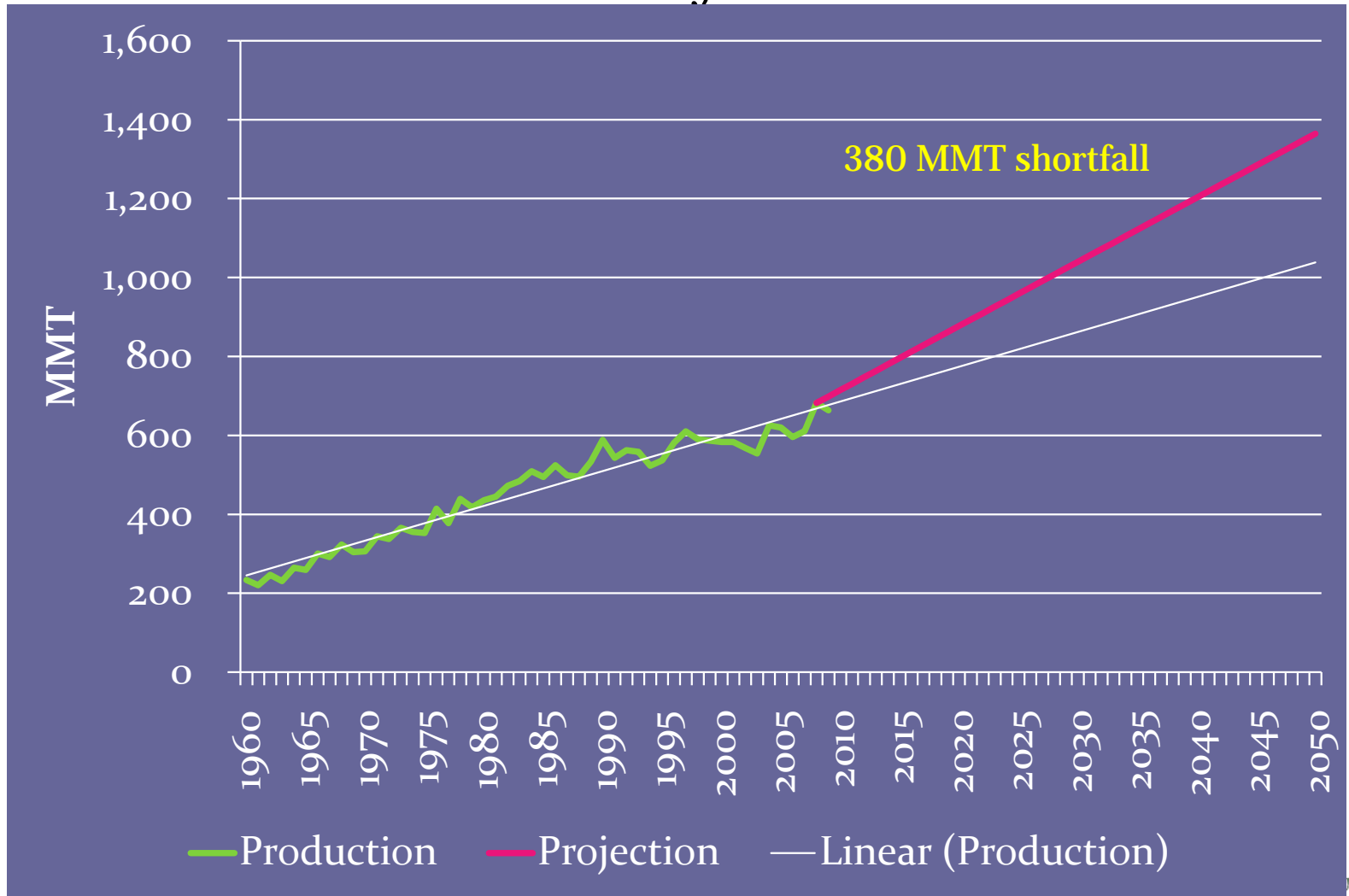
Growing Food Demand



World Wheat Supply & Disappearance



Can We Double Production by 2050?



PRAL



Increasing Supply: Challenges

- Finite supply of arable land
- Competition for land use
- Tighter supplies of water
- Higher leverage requires more capital
- Opposition to new technology
- Intense and growing regulatory constraints

SAVE THE DATE • ARA CONFERENCE & EXPO
Nov. 29 – Dec. 1, 2011 • Boca Raton, FL



Building a **Sustainable** Business

Potential Solutions

- Reduce Demand – Fewer mouths to feed

OR

- Increase Supply
 - Bring more land into production
 - Increase output on existing land

Where Should We Place Our Bets?

- World had 1.5 billion hectares of farmland (2007).
 - Declines in industrialized and transition countries: -3.4 M Ha
 - Increases in developing countries: +5.5 M Ha
- Yields: 25-50% lower for organic production vs. modern agriculture
- If yield is reduced by 25%....
 - 25% fewer mouths to feed – zero population growth between now and 2050.
 - 25% more land in production – additional 3.75 million km², an area larger than India comprised only of farmland







THANK YOU!

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