



Institute of Market Analysis and Agricultural Trade Policy

SWOT analysis of the German seed savers sector

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Outline

→ Introduction

→ Strength

→ Weaknesses

→ Opportunities

→ Threats

→ Conclusion



Initial statements

In Germany

- 'Think global' regarding agro biodiversity seems to be clearer than 'act local'
- There are much more information about 'think global' than about 'act local'
- That means: There were only few information about the activities and attitudes of plant genetic conservation by private organisations and initiatives



Expedition to the unknown area



Survey of seed savers in Germany

- Due to financial limitations and effectiveness reasons an online questionnaire was carried out
- Known organisations and actors were contacted and asked for support
- At least 4 000 Web-addresses were informed about the questionnaire
- More than 1 200 contacts
- 485 fully answered forms could be analysed
 - 388 participants (80%) are active in conservation of genetic resources and
 - 256 (52%) sell products of these activities
 - Only 30 % own a farm



SWOT-Analysis



SWOT → Strengths

Content

- Clear positive
- Not conflict prone like e.g. pesticide use etc.

Knowledge base

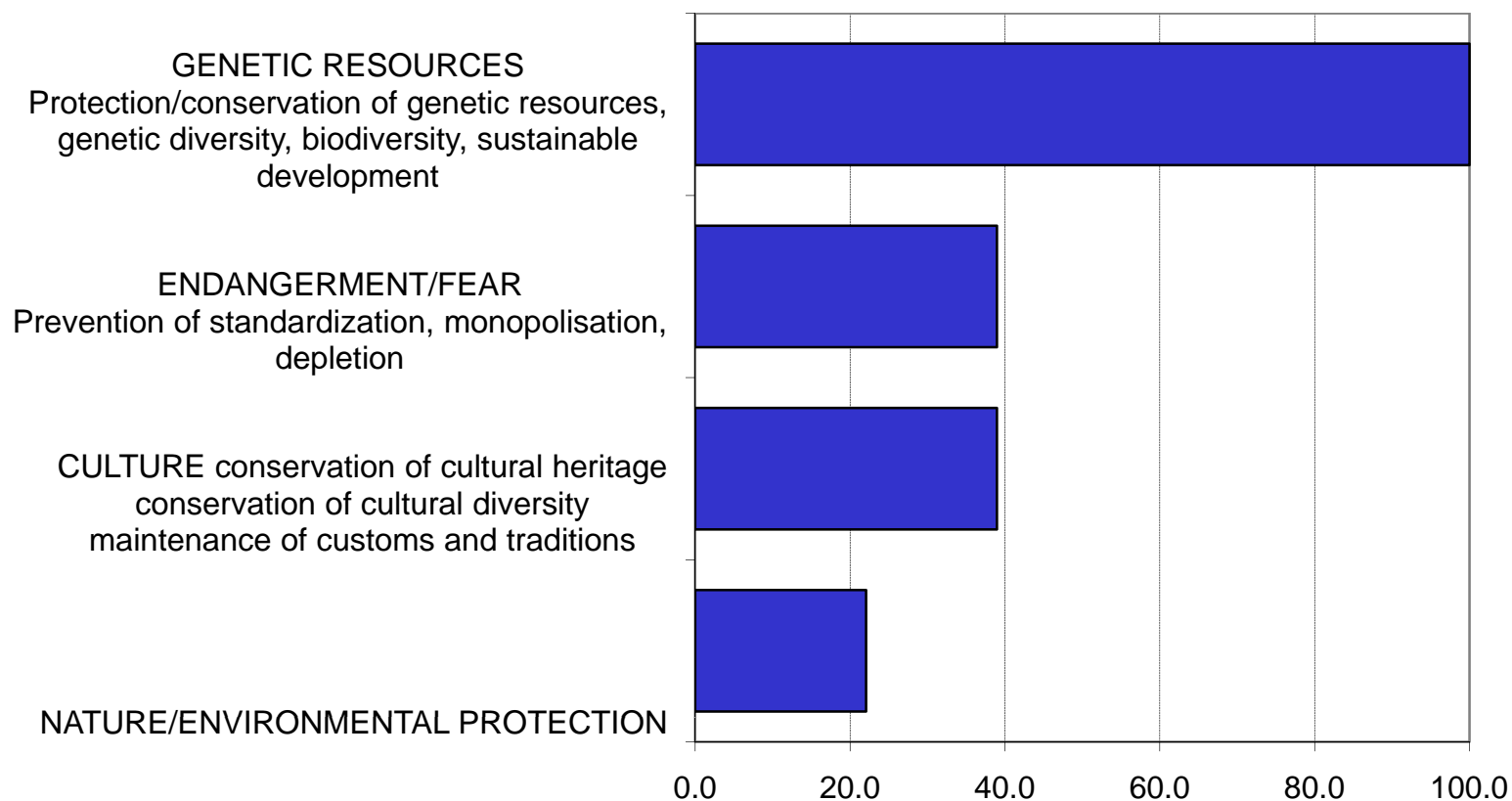
- Various scientific institutions and breeding companies

Activists

- Strong conviction
- high commitment

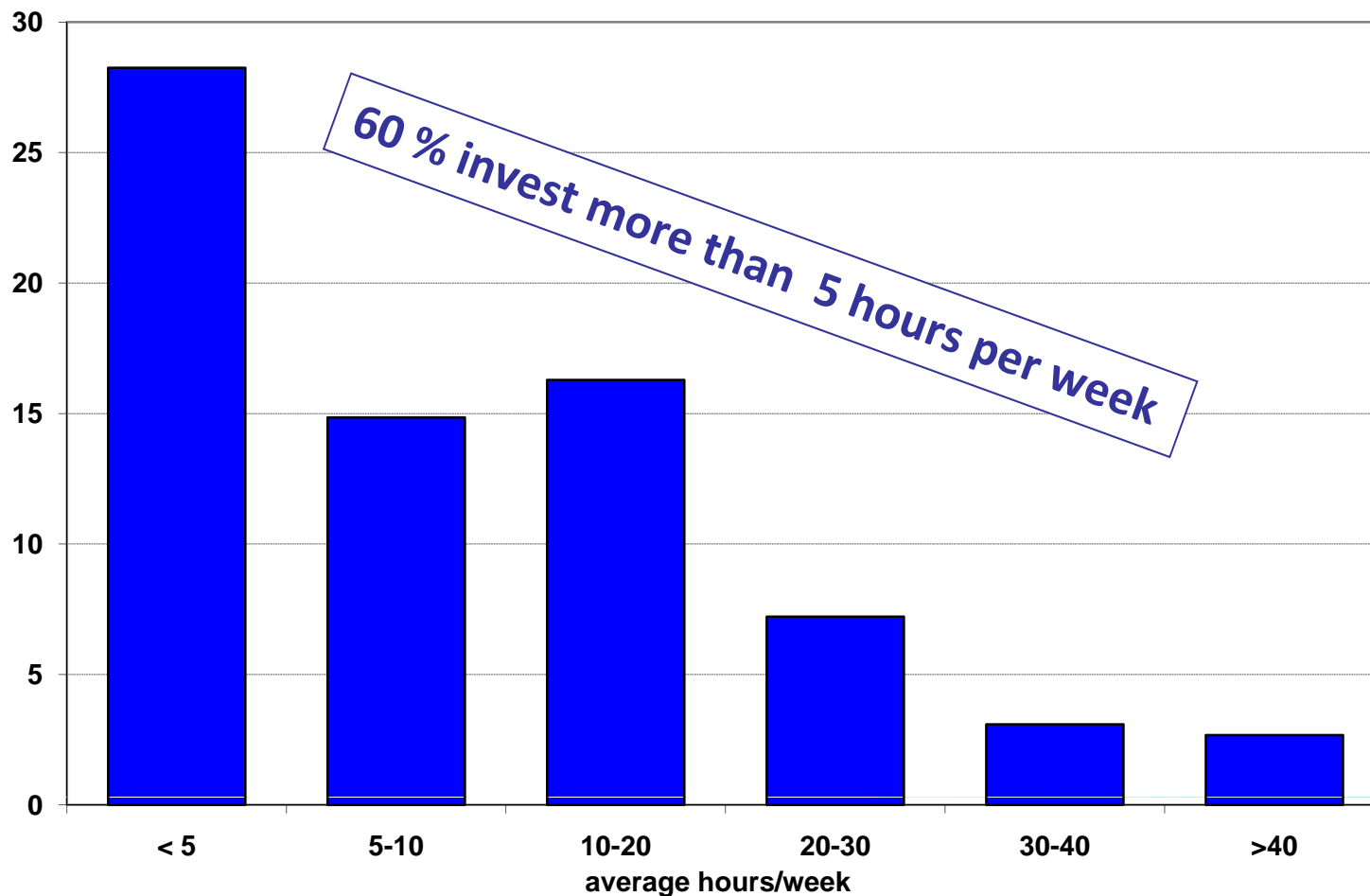
Strengths → Activists

Aspects mentioned regarding the proposed sentence 'I am active in the conservation of genetic resources because ...'



Strengths → Activists

% of answers (351)



SWOT → Weaknesses

Content

- Invisibility
- Complexity
- Measurement problems
- Difficult communication

Know how

Weaknesses → Content

“Massive problems do not only occur in the semantic comprehension of the meaning of the term, but rather also in relation to the perception and acceptance as a socially relevant topic, as a national and supra-national problem, affecting not only policy and agricultural economics, but also private consumption.”

As a result there are only few people, who are committed to agro biodiversity



Kleinhüchelkotten et al., 2006, P. 68; study prepared on behalf of the German Federal Ministry of Food, Agriculture and Consumer Protection (BMELV) on communication strategies for agricultural biodiversity

SWOT → Weaknesses

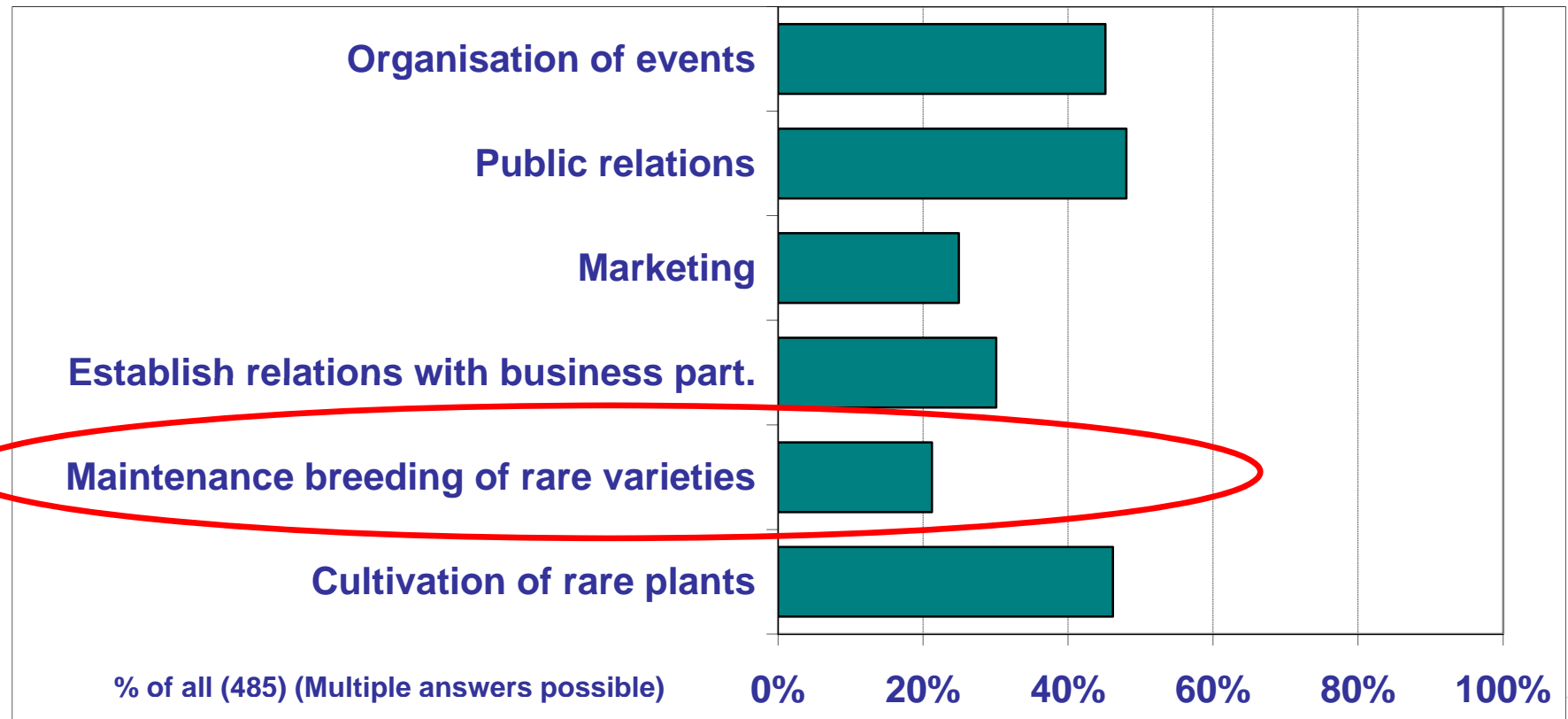
Content

Know how

- Insufficient know how of seed savers
- Rather weak connection between seed saver scene and scientific institutions

Weaknesses → know how

Survey: Sufficient skills?



Weaknesses → know how

Training and education needed but ...

“... The actor landscape is shattered, cooperation between the different breeding and maintenance associations is rare ...”



Kleinhüchelkotten et al., 2006. P. 154; study prepared on behalf of the German Federal Ministry of Food, Agriculture and Consumer Protection (BMELV) on communication strategies for agricultural biodiversity

SWOT → Opportunities

Social and behavioural trends

- Individualism
- Self fulfilment
- Transparency
- Increased ecological sensitivity
- Healthy nutrition
- Wellness
- (food) with benefits
- Regionalism

New and modified marketing channels

- Internet
- Introduction of food in other channels like drugstores, pharmacy, etc.
- New food coops '*renaissance*'
- Producer consumer movements
- Progresses in logistics
- . . .
- → Distribution-mix

Opportunities → Trends → Nutrition

- “... eating diversely is an important recommendation in nutrition science as it is associated with improved dietary quality ...”
- “Overall, the results suggest that especially the demand for healthy food diversity is mainly influenced by education and attitudes ...”
- Obviously there is a potential for agro biodiversity, but it depends on communication and public work



Drescher (2007): Healthy food diversity as a concept of dietary quality

Opportunities → New marketing channels

- Marketing channels found in the survey and additional studies dealing with market opportunities of PGR
 - Supermarkets
 - Restaurants
 - Catering services
 - Delicatessen
 - health food shops
 - Wellness centre
 - Hotels
 - Farm holidays
 - Souvenir shops
 - Travel agencies
 - Nature parks
 - . . .

A marketing and distribution mix is important as well as networking respectively regional networking



SWOT → Threats

Marketing trends

- Need of standards, big amounts and (inter)national markets
- Increased market share of discounters
- Internationalisation of consumer trends and products

Handling of agro biodiversity

- Discussion still is limited to academic circle
- Imbalance or even bias between
 - genetic resources for the main crops and
 - neglected species

Where is the consumer???

- . . . in our discourse
- actual role and effects
- advantages for daily life through agro biodiversity

New PR-Campaign of the German Ministry

Diversity is . . .

Vielfalt beginnt direkt vor der Tür!



Vielfalt macht Appetit auf mehr!



Vielfalt ist verführerisch!

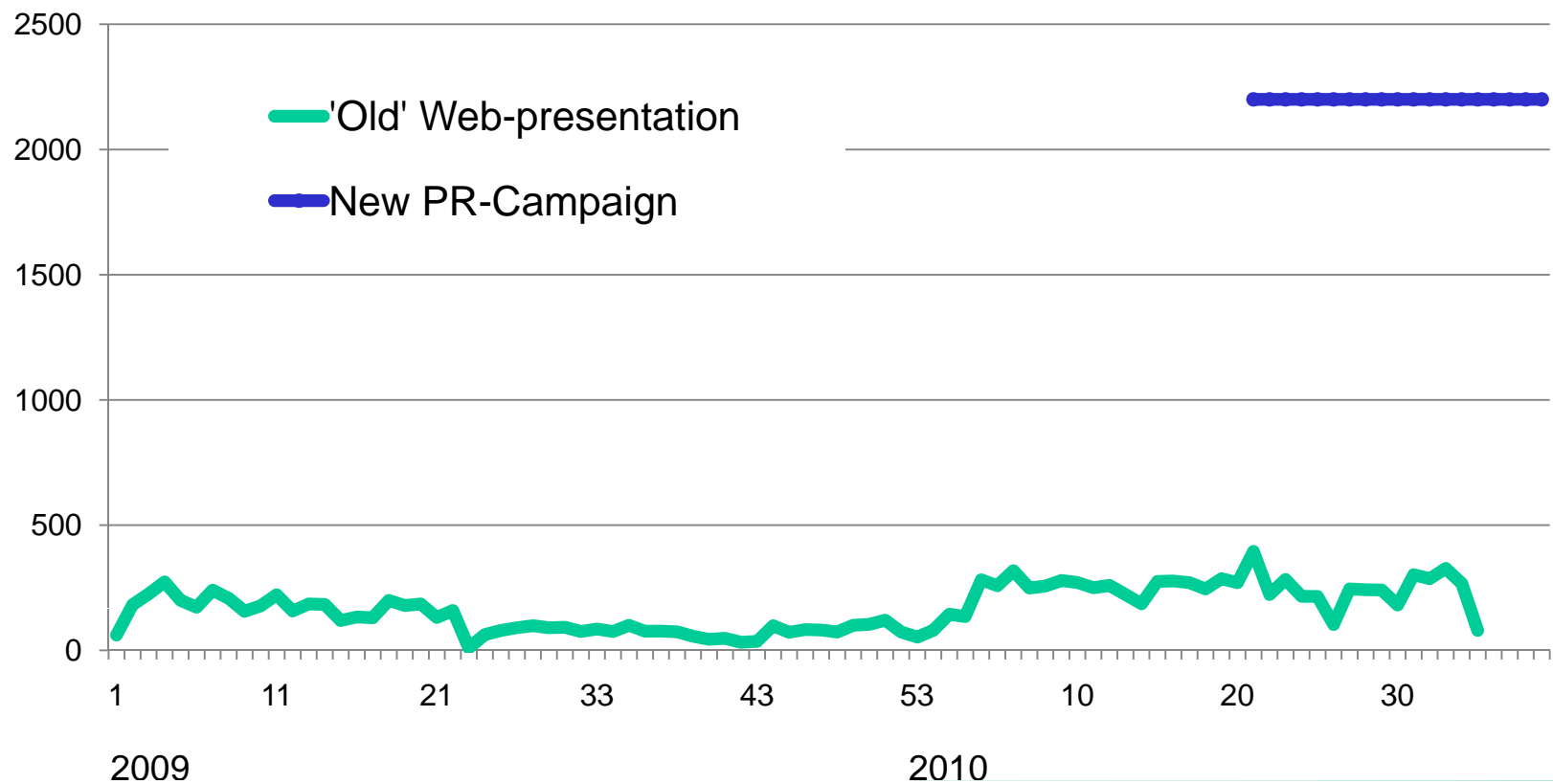


Vielfalt kommt
bei uns groß raus!



New PR-Campaign of the German Ministry

Web-visits per week



New motto and Web '<http://www.hier-waechst-vielfalt.de/>' ~ 'here grows diversity'

Concluding remarks

- Coordination and cooperation between ALL members of the field 'conservation of PGR'
 - private/public and science/practice
 - Finding and implementation of a platform
- Discussion and expression of targets that belong to consumers, consumption and daily life of citizens
- Doing research about the role, effects and influences of consumption and consumers

We need the support of the citizens for our work in order to achieve sustainability





Thank you for your attention