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Naar nieuwe business modellen in de varkenshouderij?



ILVO, Rendement in de varkenshouderij
Naar een nieuw business- model?
Melle, 26 mei 2015

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INHOUD

1. INTERNATIONALE OMGEVING
2. BELGIE IN DIE WERELDOMGEVING
3. VROEGER BUSINESS MODEL
4. HEDENDAAGSE VERWACHTINGEN
5. NIEUWE BUSINESSMODELLEN
6. BESLUIT

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1. INTERNATIONALE OMGEVING

- Growth of world population \uparrow +30% by 2050
- Economic growth

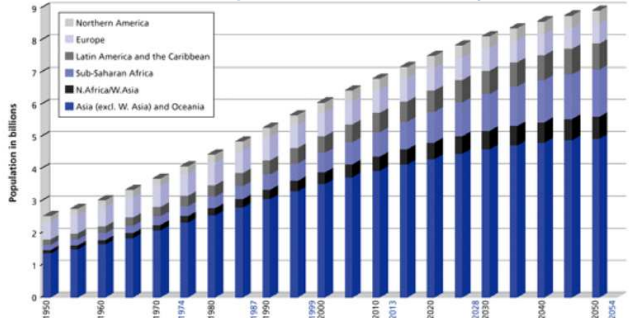
Food demand \uparrow x2

- BRICS/MINT - countries

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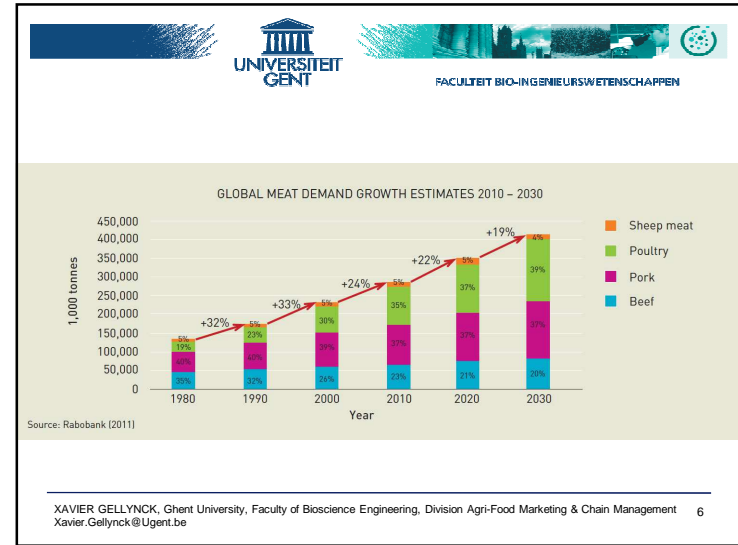
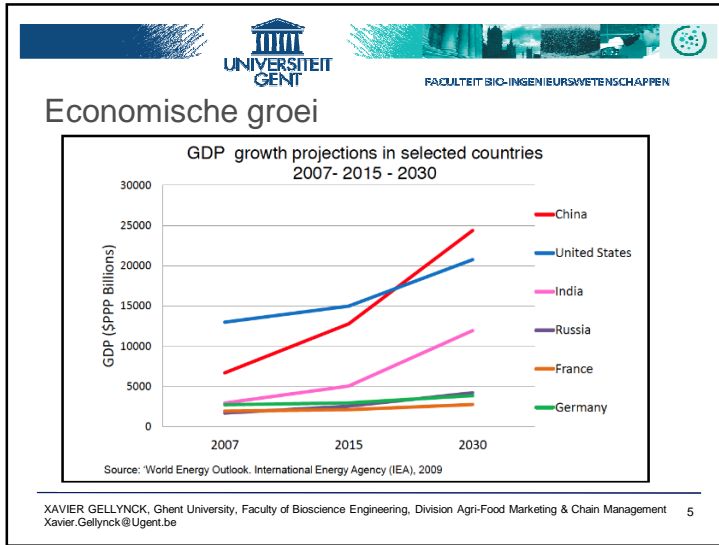
Bevolkingsgroei

World: expected increase of 30% by 2050



Source: http://www.globalchange.umich.edu/globalchange2/current/lectures/human_pop/human_pop.html

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1. INTERNATIONALE OMGEVING

- Growth of world population \uparrow +30% by 2050
- Economic growth
 - BRICS/MINT - countries
- Public spending
 - In whole EU \uparrow , CAP \uparrow
 - Support of market and prices \uparrow
 - Volatility \uparrow

Food demand \uparrow x2

2. BELGIE IN DIE WERELDOMGEVING

- Vlaanderen volgt die trend niet

Russisch invoerverbod kost Belgische varkenshouders 17 à 20 miljoen euro

30.09.2014 Varkensboeren schrijven de frustraties van zich af

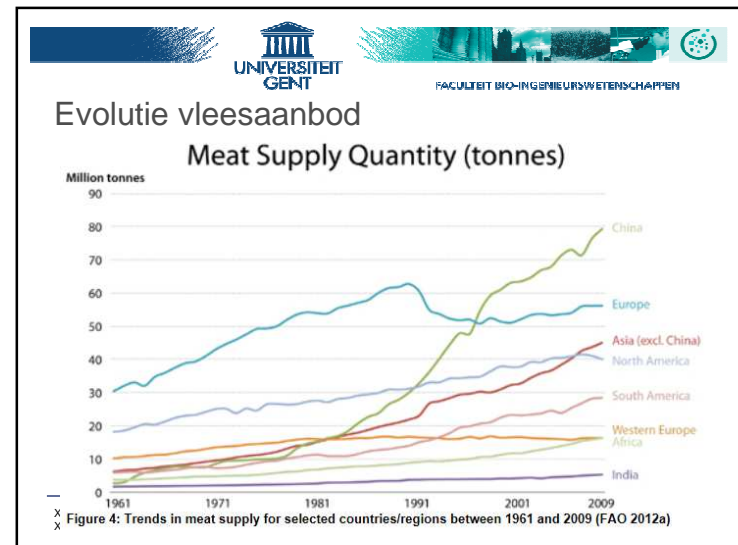
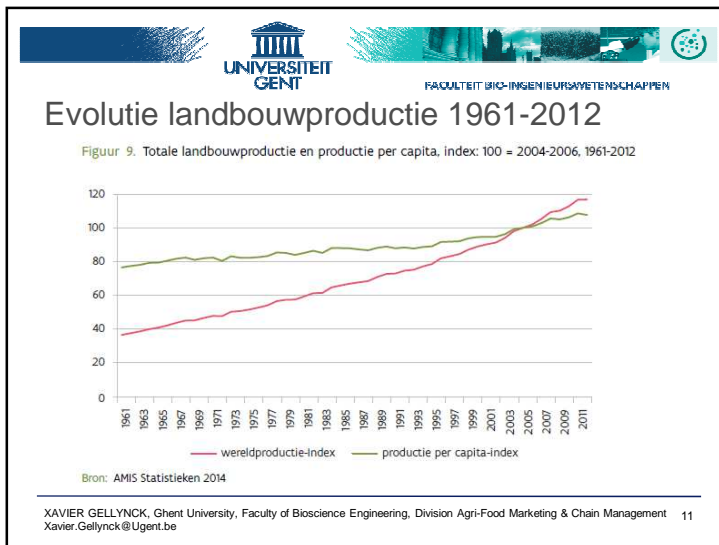
Op varkensbedrijven stapelen de verliezen zich op maar de Europese Commissie blijft volhou...
De varkensrijzen zakken naar een nieuw dieptepunt, stakketen Boer&Tuinder. In een maand ligt zij...
Erikkele varkenshouders nemen nu het initiatief voor de brevenactie 'Kruip in je pen voor (dijk) varkensvlees'. Ze sporen hun collega's aan om grieven en frustraties neer te pennen en te be...
vleesvarken op 20 euro. Belke organisaties rekenen op minister Schouttege om tijdens de Europese...
...landbouwsector te maken in andere lidstaten en die Europese Commissie tot actie te brengen.

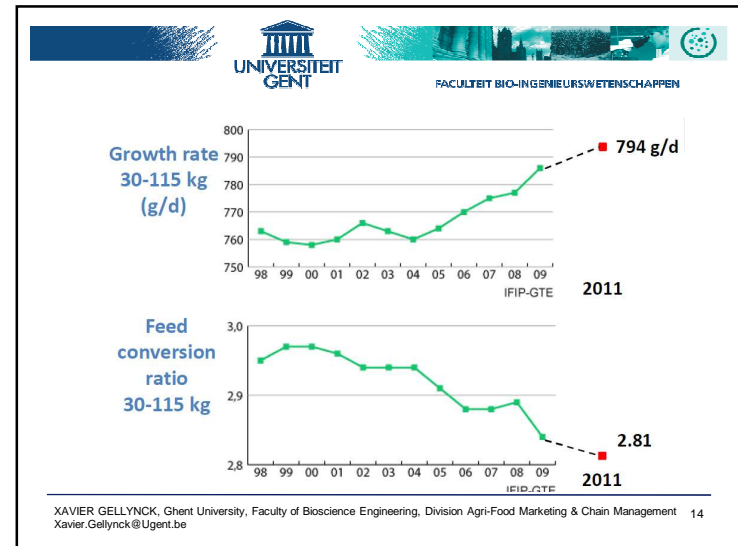
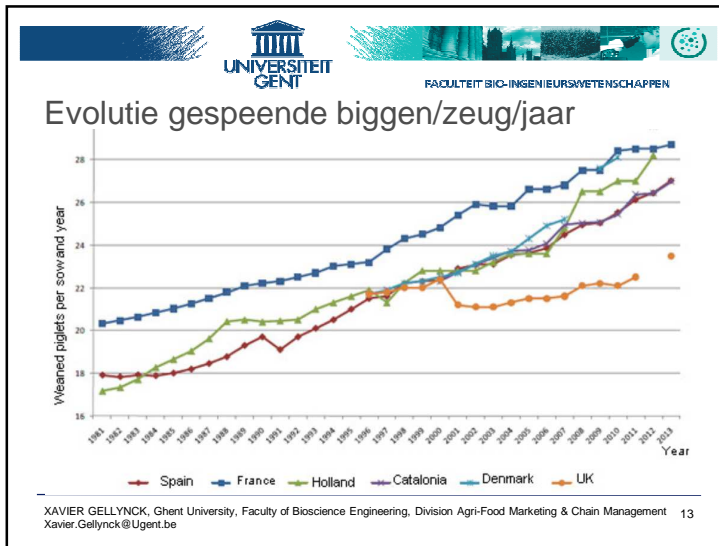


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3. VROEGER BUSINESS MODEL

- Productie ⌚ ⌚
- Productiviteit/ Efficiëntie ⌚ ⌚






3. VROEGER BUSINESS MODEL

- Productie ⓘ ⓘ
- Productiviteit/ Efficiëntie ⓘ ⓘ

Marktmacht


- Terugverdientijd investeringen
 - Landbouwbedrijf: 10-15 jaar
 - Andere schakels: 1-5 jaar
- Vaste kosten ⓘ
- Risico ⓘ: risicopremie???



3. VROEGER BUSINESS MODEL

HOW IS EACH LINK DEALING WITH MARKET POWER ?

- Farmer (unions)
 - Mainly point to other partners in the chain
 - Consider customers as opponents and competitors as supporters
 - Starting point: having the right to receive correct price/ income
 - React instead of anticipate
- Processing industry
 - Squeezed between farmer and retailer
 - How to replace the bottom price formerly fixed by the CAP?






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3. VROEGER BUSINESS MODEL

HOW IS EACH LINK DEALING WITH MARKET POWER ?

- Retailer
 - Little interest in the faith of other chain members
 - Main focus on direct competition and market share
- Final consumer
 - Limited interest in fair income for farmers
 - High interest in low prices
- Government
 - Limited resources

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4. HEDENDAAGSE VERWACHTINGEN

- Koersverandering:
 - Productie ≈
 - Productiviteit/efficiëntie ↗
 - **MARKTGERICHT PRODUCEREN** ↗ ↗
primaire + verwerkende industrie

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4. HEDENDAAGSE VERWACHTINGEN

- Marktgericht produceren:
 - Creëren van toegevoegde waarde
 - Europa is daar +/- in geslaagd
 - Marktaandeel in € is stabiel gebleven



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Invoer in Duitsland

Duitse invoer van vers en bevroren varkensvlees incl vet, spek en stachtafvallen (in ton):

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Denemarken	304.106	303.635	297.767	294.390	311.747	321.215	343.418	367.175	350.155	344.468
Belgie	296.361	306.511	332.062	355.422	340.772	324.810	323.157	331.450	335.286	339.340
Nederland	218.842	224.143	211.460	210.263	214.638	204.872	208.068	173.420	166.452	144.895
Spanje	102.611	110.243	91.360	78.108	94.587	87.930	61.830	64.879	76.554	76.450
Frankrijk	37.293	32.612	27.557	25.685	25.537	26.331	23.705	34.159	44.015	40.427
Vk	28.287	27.516	23.325	23.350	31.371	29.448	29.933	32.124	34.158	31.453
Polen	8.179	12.901	22.050	26.815	10.197	12.173	13.572	13.762	14.519	24.729
Oostenrijk	19.511	17.114	14.272	13.465	14.660	12.602	12.459	19.057	19.615	17.052
Italië	26.320	25.283	20.036	22.257	25.235	25.129	27.990	20.993	16.900	16.340
Ierland	17.154	16.834	13.787	15.820	14.234	9.793	12.509	13.642	16.119	15.021
Tsjechië	972	2.201	3.392	3.024	3.110	3.667	3.895	6.080	4.873	3.723
Overige EU-landen	7.054	10.547	10.553	19.899	26.630	7.601	5.749	8.545	8.224	7.406
Totaal EU 28	1.066.689	1.089.539	1.067.621	1.088.488	1.112.716	1.065.570	1.066.287	1.085.295	1.086.873	1.061.903
Zwitserland	9.234	4.974	8.763	10.135	11.843	16.099	16.989	17.576	17.568	16.229
Chili	1.312	1.313	2.435	2.587	6.212	5.555	3.657	3.644	2.859	2.145
Overige landen	2	21	74	20	1	42	88	42	135	282
TOTAAL	1.076.296	1.095.847	1.078.892	1.101.210	1.130.771	1.087.866	1.087.021	1.106.557	1.107.435	1.080.559

Bron: Eurostat + berekeningen ILAM

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Pig meat self-sufficiency: UK

Source: Eurostat, FAO, BPEX

Pig meat self-sufficiency: Germany

Source: Eurostat, FAO, BPEX

Pig meat self-sufficiency: Spain

Source: Eurostat, FAO, BPEX

Pig meat self-sufficiency: Poland

Source: Eurostat, FAO, BPEX


Pig meat self-sufficiency: France

Source: Eurostat, FAO, BPEX

Pig meat self-sufficiency: EU-27

Source: Eurostat, FAO, BPEX

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German pork exports

in millions of US dollars

167 (1993) **1,574** (2011)

DER SPIEGEL

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4. HEDENDAAGSE VERWACHTINGEN

- ~~Ondernemen~~ – Ondergaan

Calamiteitenbusiness (Poetin, ziektes,...)




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MARKTGERICHT PRODUCEREN/ WERKEN

- **Wat houdt dit in?**
 - ▶ Bevestigingen bij: Consumenten, retailer, slachterij, vleetsnijderij, veiling, melkerij?
 - Wat wil je?
 - Zeg me wat ik moet produceren, en ik zal dat voor u doen?
- **Waarde creëren:**
 - Welke?
 - Wie?
 - €?

Excellent
 Very good
 Good
 Average
 Poor

Van behoefte naar daadwerkelijk verzilveren...

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5. NIEUW BUSINESS MODEL

Urgent need for dramatic shift in the business model

- We can no longer allow ourselves to pass on the majority of the risks back to the start of the chain
- Mutual responsibility but the answer is mainly to be initiated at farm level
 - ▶ Restructure the farm business in order to become full partner in the chain
 - ▶ BUT: restructure to add value, not only to realize higher prices

ORGANIZE!

time to CHANGE

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You're holding a handbook for visionaries, game changers, and challengers striving to defy outmoded business models and design tomorrow's enterprises. It's a book for the...

Business Model Generation

WRITTEN BY
Alexander Osterwalder & Yves Pigneur

CO-CREATED BY
An amazing crowd of 470 practitioners from 45 countries

DESIGNED BY
Alan Smith, The Movement

The Business Model Canvas

Key Partners	Key Activities	Value Proposition	Customer Relationships	Customer Segments
	Key Resources		Channels	
Cost Structure		Revenue Streams		

2009, Osterwalder & Pigneur, Business Model Generatie
<https://canvanizer.com/>

The Business Model Canvas

Key Partners	Key Activities	Value Proposition	Customer Relationships	Customer Segments
<ul style="list-style-type: none"> • For whom are we creating value? • Who are our most important customers? • What are the customer archetypes? 				
<ul style="list-style-type: none"> • How costly are they? • Which customer needs are we satisfying? 				
<ul style="list-style-type: none"> • Through which channels do our customer segments want to be reached? • How do other companies reach them now? • Which ones work best? 				
<ul style="list-style-type: none"> • For what value are our customers really willing to pay? • For what do they currently pay? • What is the revenue model? • What are the pricing tactics? 				

<https://www.strategyfirst.com>

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- Welke aspiraties heeft onze klant en hoe kunnen we hem helpen daaraan te voldoen?
- Voor welke waarden zijn klanten echt bereid te betalen?

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Objective

- Develop a strong message and engaging branding which shows that Belgium is the worldwide reference point for excellence in food.
- The image of the sector will only improve if all the companies, industry associations, government agencies and partner organisations support this 'pride' and 'passion' message, which will lead to additional growth.

<http://www.food.be/the-best-of-belgium#!/belgium-a-cheese-country>

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6. BESLUIT

- Perspectief op groei
- Ondernemen \neq Ondergaan
- Producers \neq Waarde creëren
- Meerdere modellen
- Collectieve verantwoordelijkheid
Keten, Overheid, Kennisinstellingen




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Bedankt voor uw aandacht!

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