



TOMORROW'S POLICY ISSUES FOR AGRICULTURE:

New Players and a New Agenda

CAROLE BROOKINS

Managing Director
Public Capital Advisor, LLC

WHERE ARE WE GOING?



- We are moving from **disposability to sustainability** in terms of the way we use and manage **natural resources, production processes and lifestyles.**
- We are moving into a new era of focus on “**Global Public Goods**” and pressures for more global governance, less national sovereignty—money and finance, trade and investment, climate, societal agendas (Labor/Health).
- We are moving into **a more dangerous time** of global threats (cyber terrorism), fragmented power, groups not nations controlling weapons of mass destruction.



GLOBAL REBALANCING



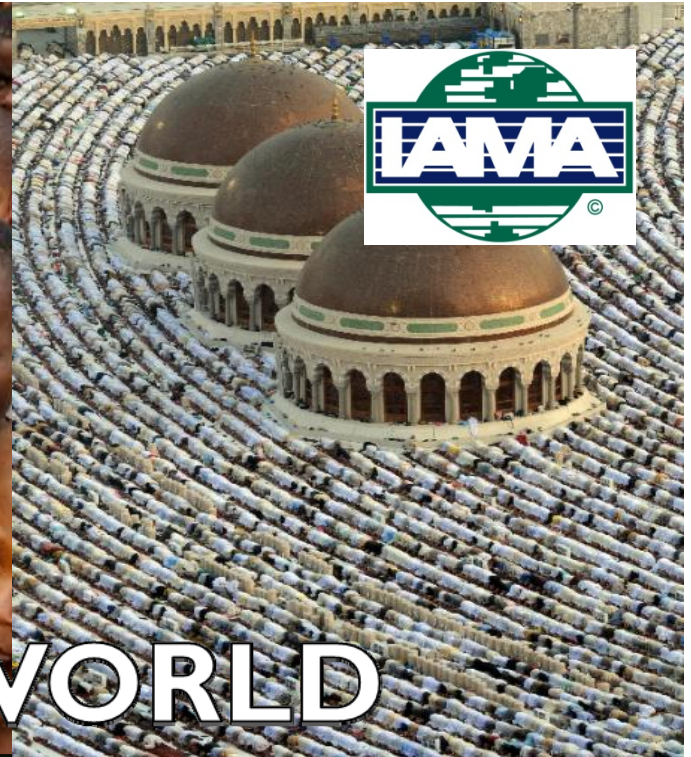
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THE 'OLD' WORLD



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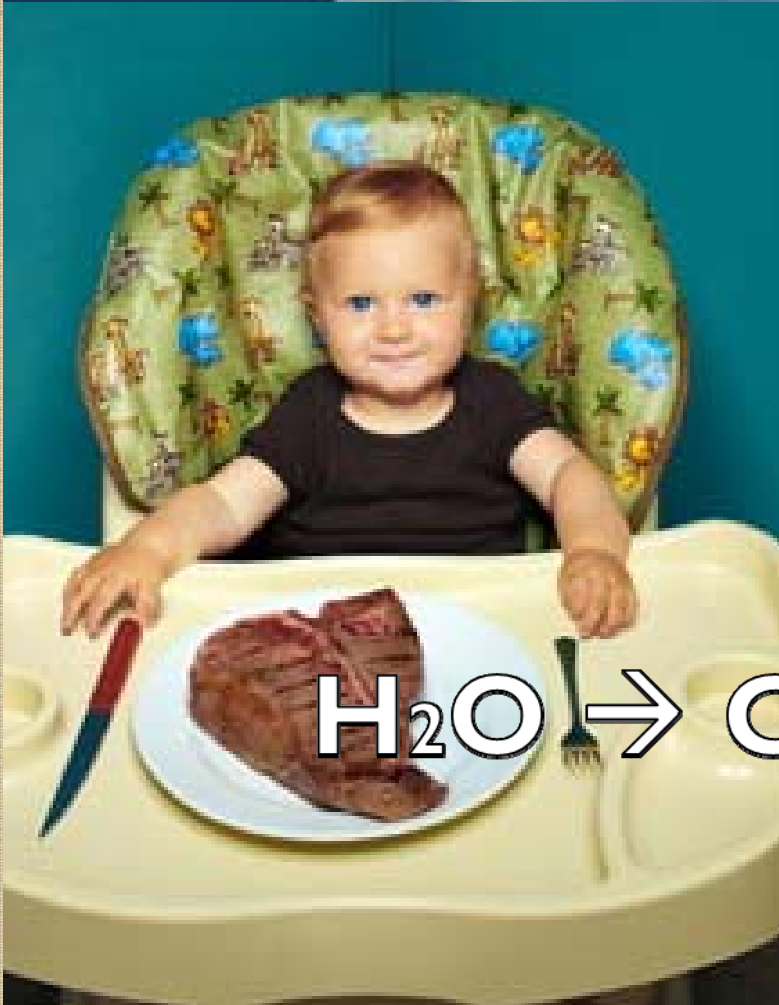


THE 'NEW' WORLD





CLIMATE INSTABILITY



$H_2O \rightarrow$ CONSUMERS



EMERGING ENERGY



REBELLION AGAINST THE MODERN FOOD SYSTEM



- Food is the new “Tobacco”
- Food is killing our children, bankrupting our health care system, destroying our land and water, endangering our planet
- Food corporations are causing food “insecurity”

Welcome to this brave new world and how people see the results of 50 years of advances in building our global food system!



**how 'bout a nice Kentucky
fried factory farmed
pandemic bird flu value meal**

FAST FOOD LEADS TO OBESITY?



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x13934023 fotosearch.com

WHERE DO WE GO FROM HERE?



- In this Brave New World, we are re-balancing the global axis of power and markets, we are re-inventing energy and technologies that run “Life” on our planet
- Consumer and Investment Trends are going to restructure production and markets for the food we eat, where we produce it, who controls it and how it is traded.

Both Your Risk and Reward will be Multiplied. Your Complexity of Choices and Competition will be Magnified.