Conference Overview

Floriculture's Environmental Footprint: an inconvenient truth or consumer opportunity?

Cornell University
Ithaca, NY
How many times have you been to Seeley?

1. First time 50%
2. 2-5 years 22%
3. 6-10 years 13%
4. 11-15 years 5%
5. 16-20 years 5%
6. 21-24 years 5%
7. All 25 of'em 2%
2007 and 2008

Profit Squeeze
Is There A Solution?
It’s not about cost cutting, it’s about aligning your operation to benefit your customer.

Profit Squeeze Part 2
Is Differentiation the Solution?
In addition to customer focused efficiency, there must be more!

23rd Annual
Seeley Conference
June 21-24, 2008
Cornell University
2009

24th Annual Seeley Conference
June 28 - July 1, 2009
Cornell University
Ithaca, NY

Chaos!
Are YOU realizing the opportunity?

It has been an especially challenging year for businesses dealing with the global economic pressures and the resultant impact on consumer spending and changed mindsets. Merriam-Webster defines Chaos as "the confused, energized state existing before the creation of distinct forms." The American writer, Henry Miller has said "Chaos is the score upon which reality is written."

If this is the state of the economy and industry early in 2009, we ask the following questions:
- Chaos, or market disruption, creates new opportunities to reposition and differentiate. Are YOU ready?
- Consumer mindsets and purchase behaviors have changed dramatically. Are they permanent?
- Business Darwinism...survival goes not to the strongest, but to those who are the quickest to adapt to change. Where do you stand?
- We've become comfortable with evolutionary change. Chaos calls for revolutionary change! Can you cope?
- What's your value message? Is it relevant to today's customers and how do you communicate it?
- Facebook, Twitter, MySpace, Blogs, Podcasts...new tools to reach tomorrow's consumers. Are you ready for 21st century marketing?

As always, the think-tank atmosphere of the Seeley Conference will allow for plenty of interaction with fellow industry leaders. We invite you to join us in Ithaca for a valuable discussion.
Why this topic in 2010?

Fioriculture’s Environmental Footprint: an inconvenient truth or consumer opportunity?

As in any market transition, there will be winners and losers. In the face of this emerging reality, the questions facing you are numerous:

- What kind of climate-related action is prudent for my company? Are there opportunities amidst the uncertainty of this market transition? How do consumers really feel about sustainability issues? Does their purchasing match their dialogues?
- What is my company’s water and carbon footprint and how will potential changes in policy and market domains affect the positioning of our products and services? What tools and IT systems are available for calculating these footprints?
- How can I reduce my water and carbon footprint and find strategic advantage in those actions? Are there lessons we can learn from related industris?
- What’s my environmental footprint message? Is it relevant to today’s customers and how I communicate it? Do I have a good story to tell?

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GLOBAL WARMING
50% of consumers buy green products today

50% of consumers choose not to buy green products for various reasons...

- Relevance: 12%
  - Don’t think green products are relevant to their shopping needs

- Awareness: 34%
  - Are unaware of green products

- Availability: 10%
  - Feel there are not enough green-product options

- Choice: 16%
  - Prefer another brand
  - Don’t trust green-product claims

- Brand: 10%
  - Think green products are of lesser quality

- Quality: 4%
  - Think green products are too expensive

- Price: 2%

Sources: BCG Global Green Consumer Survey, 2008; BCG analysis.
Note: About 4,000 respondents from all surveyed countries except China—about 50 percent of the respondents to our survey—were asked to indicate the main reason why they had not recently bought green products. Percentages do not total 100 because of rounding.
WTP & Consumer Segments for Biodegradable Containers

- Price conscious or sensitive
- Carbon footprint sensitive
- Non-discriminating
- Environmentally conscious
- Demonstrate liking to rice hull
- Demonstrate liking to straw
- Demonstrate dislike for straw

<table>
<thead>
<tr>
<th>Container attribute</th>
<th>WTP results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plastic</td>
<td>base</td>
</tr>
<tr>
<td>Rice hull</td>
<td>$0.58</td>
</tr>
<tr>
<td>Straw</td>
<td>$0.37</td>
</tr>
<tr>
<td>Wheat (OP-47)</td>
<td>$0.23</td>
</tr>
<tr>
<td>Carbon saving</td>
<td>$0.17</td>
</tr>
<tr>
<td>Carbon neutral</td>
<td>base</td>
</tr>
<tr>
<td>Carbon intensive</td>
<td>-$0.43</td>
</tr>
<tr>
<td>No waste</td>
<td>base</td>
</tr>
<tr>
<td>1-49% waste</td>
<td>$0.15</td>
</tr>
<tr>
<td>+50% waste</td>
<td>$0.23</td>
</tr>
</tbody>
</table>
Floriculture’s Environmental Footprint: an inconvenient truth

OR CONSUMER OPPORTUNITY?

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So let’s get started...
Saturday, June 26
5:30 – 8:30pm Registration at the conference hotel
Dinner on your own with colleagues.

Sunday, June 7
7:30am Registration at Cornell Vet School
8:00am Opening, Introduction of participants
— Bill Miller, Cornell University
Introduction to the Conference
— Charlie Hall, Texas A&M University
The Big (Environmental) Picture
— Dr. Robert Stavins, Director, Harvard Environmental Economics Program
Discussion
12:30pm Lunch
1:30pm Green Business Driving Forces
— Joel Makower, CEO, Greener World Media
An Overview of the Sustainable Sites Initiative
— Dr. Steve Windhager, Lady Bird Johnson Wildflower Center
Panel Discussion
6:30pm Socializing
7:30 pm Banquet
9:30pm Networking and Socializing

Monday, June 28
8:00am Recap of Sunday’s discussion and overview of the topics for the day.
Making the Grade – Examples of environmental sustainability from outside floriculture
Two case studies
Walmart and Food Marketing Institute
Discussion
What Exactly IS Our Footprint?

Water and the Water Footprint
— Kaji Kado, PPD Technologies
12:30 pm Lunch
What Exactly IS Our Footprint? (continued)
The Carbon Footprint
— Dr. Will Healy, Ball Horticultural Company
Case Studies from Those Who Are Operationalizing Sustainability
— Augusto Solano & Andrea Toro, Florverde
— Mark Elting, Elziega & Booksema
— Rick Brown, Riverview Farms
— Maria Kriemernacher, Pork & Plants
Discussion

5:30 pm Socializing - Monkey Run
7:30 pm Chicken Bar-B-Q
— Master of Ceremonies – William B. Miller
9:30 pm Networking and Socializing

Tuesday, June 29
6:00 am Closing Keynote
— Bob Bolboas, ANLA
Branch
Telling Our Story
— Fred Haberman, Modern Story Tellers
Discussion
Invited discussants include:
— Debbie Hanrick, N.C. Farm Bureau
Coordinator’s Summary Comments
12:00 pm Adjourn

About Seeley Conferences
Seeley Conferences were established in 1988 in honor of Dr. John B. Seeley (1915-2003) after his retirement from Cornell University. Each year a confer-
ence area important to the future of horticulture is nominated by the council Directors.

Seeley Conferences are intended to promote discussion of issues important to the future of commercial floriculture. The meetings are structured to foster discussion by industry leaders and increase the level of understanding of topics through presentations by speakers with a wide range of backgrounds and experiences. The goal of the conference is to prepare attendees to make decisions that have a direct impact on their business, and the industry as a whole.

To assure free exchange of ideas, participants including representatives of the trade press, are asked to not attribute comments or points of view to any speakers or industry leaders unless such dissemination is agreed to by the person expressing their point of view.
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