

# Protective Cultivation and Market Linkage

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## SUSTAINABILITY VS THE BOTTOM LINE IN COMMERCIAL HORTICULTURE

The shift toward efficient greenhouse systems is accelerating. Water recycling, nutrient recovery and lower-carbon production are increasingly being engineered into modern facilities. In many cases, these are no longer optional features, but part of the baseline design for new developments. However, these systems come with a cost. Higher capital expenditure, increased technical complexity, and tighter operational requirements all raise a fundamental commercial question:

## WHERE DOES SUSTAINABILITY CREATE REAL VALUE?

The answer is often straightforward - At the point of sale. In most retail markets, price remains the dominant factor. Consumers may express a preference for sustainable, residue free produce, but this does not consistently translate into a measurable premium. Yet focusing only on retail pricing misses the wider shift taking place. Value is increasingly being recognized elsewhere in the chain:

- In long-term off take agreements where consistency and traceability are critical
- In retailer procurement standards that prioritise resource efficiency and supply



security

- In export markets where compliance is becoming more stringent
- In regulatory environments that are steadily tightening

In these contexts, sustainability is not simply a differentiator. It is becoming a condition of participation. This reframes the question. The issue is no longer whether sustainability commands a premium at the shelf. It is whether a production system can meet the requirements of the markets it intends to serve reliably, consistently, and at scale.

Protective Cultivation systems, efficient

water use, and integrated resource management are not just environmental considerations. They are directly linked to operational resilience, input stability, and long-term cost control.

The commercial outcome, therefore, is not always visible in the price of a single product. It is reflected in:

- Access to markets
- Stability of supply
- Predictability of production
- The ability to operate under increasing regulatory and resource constraints.

Sustainability, in this context, is not a premium feature. It is a performance requirement.

The real question is:

Which parts of the value chain are willing to pay for it, and which are not?

