

SUSTAINABLE
AGRICULTURE
INITIATIVE
PLATFORM

15 YEARS
developing
solutions
together



2017
CONFERENCE
& GENERAL ASSEMBLY
FEEDING THE WORLD'S RAPIDLY
GROWING URBAN POPULATION
BEIJING, CHINA



Local Partner



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Communications



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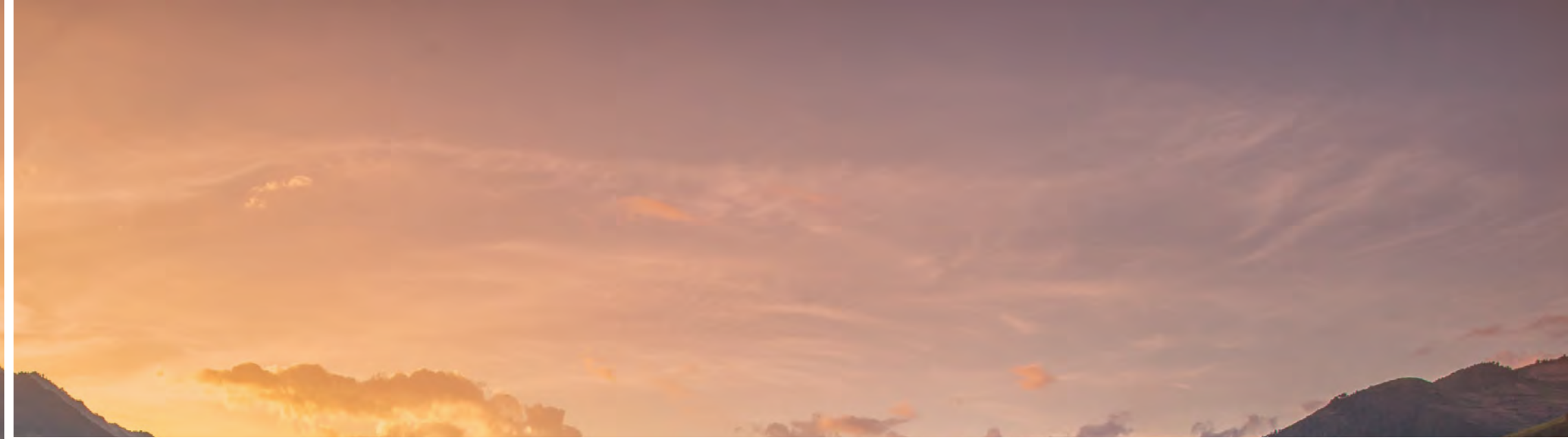


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**2017
CONFERENCE
& GENERAL ASSEMBLY
FEEDING THE WORLD'S RAPIDLY
GROWING URBAN POPULATION
BEIJING, CHINA**

23 April
PRE-CONFERENCE
WELCOME

24 April
CONFERENCE &
15TH ANNIVERSARY
GALA DINNER

25 April
ENGAGEMENT
SESSIONS &
GENERAL ASSEMBLY

26 April
FIELD VISITS

142
DELEGATES

from across the food
and drink industry and
the field of sustainable
agriculture

81
organisations

52% members

48% partners & external
stakeholders

35%
SOURCING &
AGRICULTURE

25%
MANAGEMENT

24%
SUSTAINABILITY

8%
RESEARCH

8%
COMMUNICATION

52%

food & drink
companies

6%

farming
organisations

7%

retailers

19%

accademia,
associations,
government,
NGOs, research

6%

agribusiness,
chemical,
technology,
pharmaceutical

10%

assessment,
audit,
certification,
finance, logistics,
management, tax

#SAIPLATFORM2017
AT A GLANCE

142 delegates from across the food and drink industry and field of sustainable agriculture

Food & Drink Companies

Members

Agrana
Cargill Investments China
Cargill
Coca-Cola China
The Coca-Cola Company
Danone
Döhler
Diageo
Ferrero
Heineken
Ingredion
innocent drinks
Kepak Group
Kerry Group
Linkage Farm Frites
Louis Dreyfus Company
Mars Inc.
Mars Petcare
Mars Foods China
McCain Foods
Muntions
NESTEC S.A.
Nestlé China
Nordzucker
PepsiCo
PepsiCo Foods China
SVZ International
Symrise
Symrise Shanghai
Suedzucker AG
Unilever

External Stakeholders

BCFoods
China Spice Services
Feihe Dairy
Fruidis
FRUIDIS-SCMEHE
Mengniu
SDIC Zhonglu Fruit Juice
Shaanxi Haisheng Fresh
Fruit Juice Co.
Shaanxi Hengtong Fruit
Juice & Beverage Group
Co.
Starbucks Coffee
Company
Wits Foods industrial
(Anhui) Pte Ltd.
Yantai North Andre Juice
Co. Ltd.

Farming Organisations

Members

Agrifirm Group
Ammerland
Arla Foods
FrieslandCampina
Grain Farmers of Ontario

Retailers

Members

Marks & Spencer
Migros (HK)

External Stakeholders

Beijing Chunbo
Technology Co.
Beijing Miss Fresh Co.
CP Group
China Resources
Vanguard

Academia, Associations, Government, NGOs, Research

Members

Bord Bia
EISA

Partners and External Stakeholders

CAAS/IFST
(China Academy of
Agricultural Sciences
(CAAS) Institute of Food
Science and Technology
(IFST))
FAO
FAO Bangkok
GIZ
GWEC
MIT Joint Program on the
Science and Policy of
Global Change
The Nature Conservancy,
Brazil
Rare
Solidaridad
Values for Development
World Business Council for
Sustainable Development
World Economic Forum
WWF

Agribusiness, Chemical, Technology, Pharmaceutical

Members

Lely Holding
Netafim

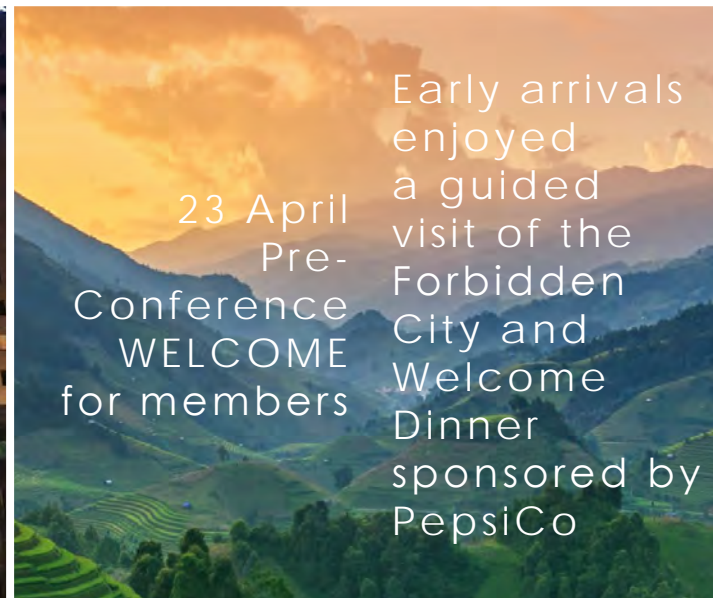
Partners and External Stakeholders

Alltech China
Bayer
Syngenta

Assessment, Audit, Certification, Finance, Logistics, Management, Tax

Partners and External Stakeholders

Bonsucro
Control Union
DQS AP
GLOBALG.A.P.
PwC
Rabobank
SGS-CSTC Standards
Technical Services Co.
Tianjin Top Education
Consulting Co.





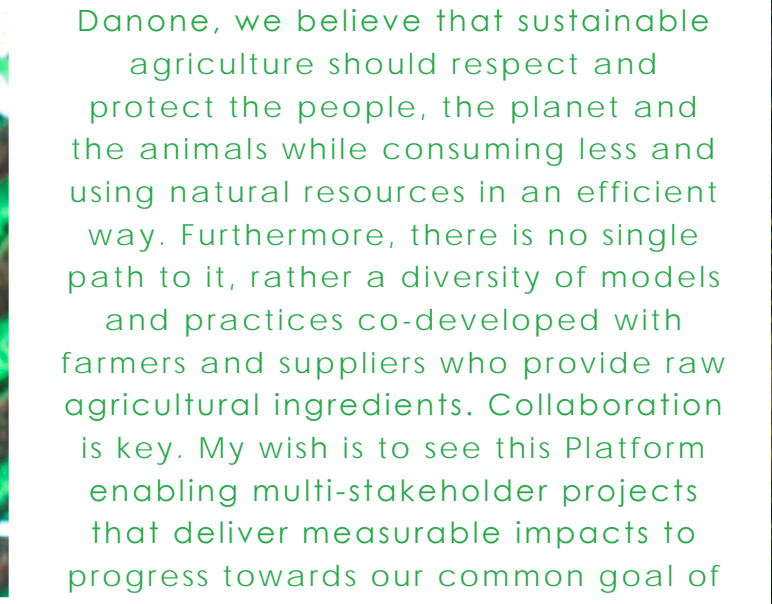
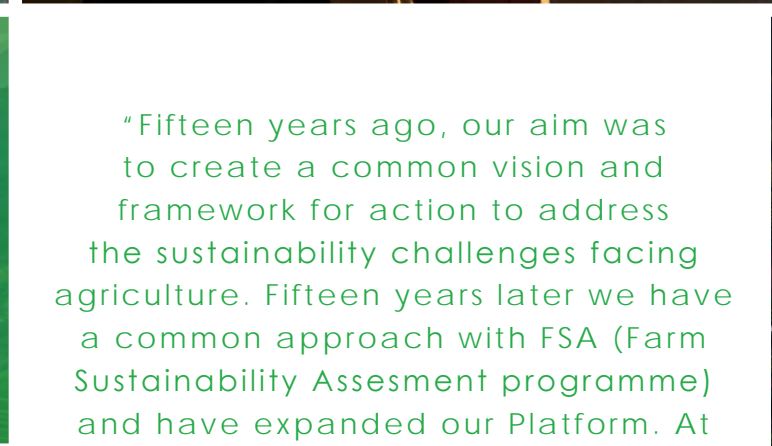
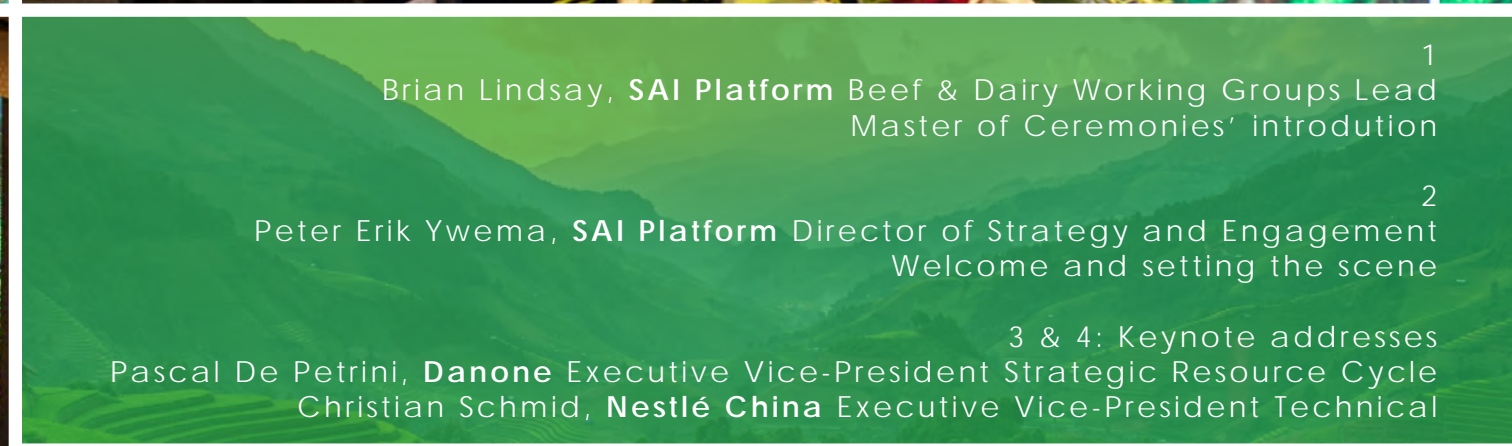
24 April
CONFERENCE
DAY &
15th Anniversary
Gala Dinner

Arrivals and
breakfast
sessions

1. Facts and
statistics on
China
Dirk Jan Kennes,
Rabobank

2. Introduction
to SAI Platform
in Chinese
Jeff Lindsay,
SAI Platform







Session 1
BUSINESS STRATEGY TO DELIVER IMPACT
Roles and opportunities for the food sector in supporting the delivery of the Sustainable Development Goals

1
Carolyn Opio, **FAO** Livestock Policy Officer
The Sustainable Development Goals
Shaping business strategy through to 2030 - The roadmap for delivery and business solutions related to the agri-food sector

2
Jason Clay, **WWF** Senior Vice-President of Markets
SAI Platform Advisory Council
Meeting the sustainability challenges of the food and agriculture sectors
Unlocking significant business opportunities

3
Martin Ma, **Solidaridad** Managing Director
China's 13th 5-year strategic plan for the agri-food sector
Sustainability: core to delivering the food supply for China's future

4
Adrian Greet, **Mars** Global Sustainability Programme Director
SAI Platform Executive Committee
A practical approach to embedding the SDGs into corporate strategy

"Sustainability is no longer an option for the private sector"
"The Sustainable Development Goals will be the foundation for the future"

"Public private collaboration is critical to implementing the SDGs. FAO is open to engaging with all stakeholders."
Carolyn Opio, **FAO**

"Sustainability is a pre-competitive issue and we need to solve the issue together"

"In the next 40 years, we have to produce as much as we did in last 8,000 years"

"We waste 1 out of 3 calories. [...] Let's make it less easy to waste food. Factor real cost of food production into the cost"

"We need to figure out how to freeze the footprint of food"

"Growth of intangible assets represents value of brand, reputation, and sustainability"
Jason Clay, **WWF**



"We need one voice of industry and civil society to work with government to step up"
Adrian Greet, **Mars**



Session 1 Panel discussion

Session 1 **Objectives**

This session explored the SDGs and how they apply to both developed and emerging markets. It explored the role of the agri-food industry in supporting the delivery of the SDGs, appreciating which of the 17 are most relevant for the sector.

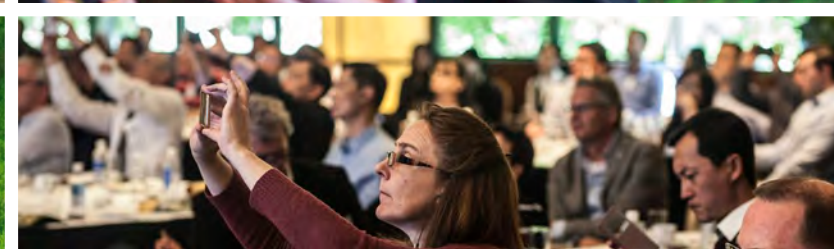
Panel - left to right:

1
Carolyn Opio, **FAO**

2
Moderating:
Steve McLean, **Marks & Spencer**
Head of Agriculture and Fisheries
SAI Platform Executive Committee

3
Adrian Greet, **Mars**

4
Martin Ma, **Solidaridad**



5 Patrick Wrixon, EISA
6 Roberto Vega, Syngenta
7 Jonathan Dong, Nestlé Greater China Region



Session 2
TECHNOLOGY AND INNOVATION
in advancing sustainable agriculture

1
James Pennington, **World Economic Forum** Project Specialist, Circular Economy
Embedding a circular economy in the food industry

2
Dirk Jan Kennes, **Rabobank** Global Strategy Farm Inputs
The opportunities for farmers to raise capital going forward (farmer engagement technology) and the role of technology in farm investment in agriculture and food production

3
Zhang Hong, **CAAS** - China Academy of Agricultural Sciences, Institute of Food Science Technology Research Fellow
The development of the Chinese potato industry as a staple food source and for its nutritional health value

4
Naty Barak, **Netafim** Chief Sustainability Officer
Latest trends in sustainable water management - a key priority in the future of global agriculture

"8 million tonnes of plastic waste go into the ocean each year. That's one garbage truck a minute"

James Pennington
World Economic Forum





Session 2 Panel discussion

Session 2 **Objectives**

What innovation and technologies are required to feed the fast-growing urban population? To apply these technologies, what skills are required from our future workforce and how will we ensure agriculture attracts the technical expertise to operate this technologically advanced sector?



"The China five-year plan and commitment to agriculture is fully aligned to SAI Platform's vision and this is an opportunity for us to drive scale and speed of delivery for improved agricultural practices to help farmers thrive."

Adrian Greet, **Mars SAI Platform**
Executive Committee

- Panel - left to right:
- 1
Moderating:
Brian Lindsay, **SAI Platform**
Beef and Dairy Working Groups Lead
 - 2
Dirk Jan Kennes, **Rabobank**
 - 3
Zhang Hong, **CAAS**
 - 4
James Pennington,
World Economic Forum
 - 5
Naty Barak, **Netafim**



6 Juliette Hillier Caulkins, Mars Petcare
7 Nigel Davies, Muntions
8 Hans Jöhr, Nestlé



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Session 3 Panel discussion

Session 3 **Objectives**

This session highlighted a number of success stories where food industry players have implemented innovative initiatives as they strive to increase their efficiency and outputs in a sustainable manner.

- Panel - left to right:
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Moderating:
Paul Gardner, **Danone**
Vice-President of Direct Materials
SAI Platform Executive Committee
 - 2
Derek Fushun Wu, **Mengniu**
 - 3
Giovana Baggio,
The Nature Conservancy Brazil
 - 4
Sinne Bundgaard Nielsen, **Mengniu**
 - 5
Jonathan Dong,
Nestlé Greater China Region



6 Carolyn Opio, FAO
7 Hans Jöhr, Nestlé



Session 4: Closing panel discussion
FEEDING THE WORLD'S RAPIDLY GROWING URBAN POPULATION

This session brought together the findings of the earlier sessions and debated the key priorities for the food sector in the future to ensure that the SDGs are at the forefront when feeding the fast-growing urban population. This provoking panel debate drew on knowledge and expertise from many different angles to show how a collaborative approach to sustainable agriculture can achieve the desired outputs.

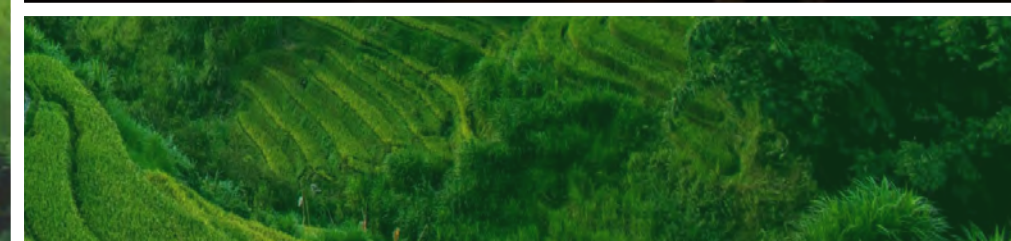
- Panel - left to right:
- 1
Jonathan Dong,
Nestlé Greater China Region
 - 2
Dirk Jan Kennes, **Rabobank**
 - 3
Pascal De Petrini, **Danone**
 - 4
Giovana Baggio,
The Nature Conservancy Brazil
- Moderating:
 5
Ulrike Sapiro,
The Coca-Cola Company
 Director of Sustainability and
 Stakeholders
 Europe, the Middle East and Africa
SAI Platform President



6 Tillman Reiser, Ammerland
 7 Ann Burckhart, Starbucks Coffee Company
 8 Rozanne Davis, innocent drinks



During a break, we asked delegates to consider where their organisations can have the greatest impact in supporting the delivery of the Sustainable Development Goals.





"There was such a buzz of enthusiasm around and a great interaction between all those present. It was a great opportunity to meet people with similar aims and ambitions, enabling very useful interactions with participants on how to make a difference."

Patrick Wrixon, **EISA**

"We were interested to learn that more engagement is needed on the company side; that the global challenges on sustainability are more intertwined and challenging than we initially thought; that global FMCG players have more potential to unleash when working together and that more education is needed on the end-consumer side."

Tillman Reiser, **Ammerland**

"The presentations of the NGOs, scientists, and research institutes were very interesting in terms of knowledge sharing. They were full of content and you could see the impact on the participants."

Caroline Duivenvoorden, **Agrifirm**



"The future belongs to those who believe in the beauty of their dreams."
Eleanor Roosevelt

"We had a dream when we started, with friends from Unilever and Danone, the SAI Platform Association, created and incorporated in Geneva, Switzerland, in 2002.

Let me take you quickly back in time. Ten years earlier, in 1992, there was the first Rio Summit on sustainability and a mounting pressure was building up from NGOs, activist groups, and certification schemes and labels in the food industry, creating niche markets. These were on a steep growth path, but none were addressing prominently "Sustainable agricultural production practice changes and methodologies" - what in fact mainstream agricultural production would need; exactly where food industries are sourcing from.

So, the question was: "Do we want to double niche markets or really go for the big bang, impacting mainstream?" And, how do we define success?

We decided for impacting mainstream...and the big dream started to materialize.

Now, after 15 years, SAI Platform is still growing, with close to 100 members."

Hans Jöhr
Nestlé
SAI Platform Honorary President



Sustainability challenges

- Land resources: quantity & quality**
 - Farm land loss to urbanization; low average fertility
- Water resources: efficiency and quality**
 - <50% of irrigation water reaches the field; water source pollution from agriculture
- Nutrient management: efficiency, organic resources**
 - High N fertilizer application rates, low use of organic resources
- Food quality and safety**
 - intensive production practices + longer supply chains + increased food trade, transport and processing + wide variation in regulatory capacities
- Social transformations: changing farm labour force**
 - Large-scale migration; women and elderly taking on greater labour



Dairy for triple win

1. Nutritional and health benefits:

- 12% of the population in Asia is hungry
- 30% of the children stunted
- Milk is a good supplier of energy, protein, vitamins and minerals.
- Evidence available that school milk programs have aided the reduction of stunting among children

Source: FAO Asia and the Pacific Regional Overview on Food Insecurity, 2016

1. Definition and function of food traceability system

Traceability means the ability to trace and follow a food, feed, food-producing animal or substance intended to be, or expected to be, incorporated into a food or feed, through all stages of production, processing and distribution.

Function of food traceability system

- Improve the transparency of the food chain;
- Identify the contamination sources, responsible person, and the reason of food safety crisis food;
- Recall substandard products.

Damuhong Gouji Co. Ltd.

Addressing land degradation

SAI PLATFORM CONFERENCE

可持续农业启动平台年会
FEEDING THE WORLD'S RAPIDLY GROWING URBAN POPULATION
满足城市激增人口的食物

24-26 April 2017
2017年4月24-26日
Beijing, China

FSA Programme: recent progress and achievements

1. Wide implementation
10,000+ farms
2. Alignment across standards
70 by end of 2017
3. Online tool co-developed
1.9 users
4. Focus on outcomes
10 metrics
5. Proven flexibility
30 crops/countries

Sustainable Rice Project (SAIRISI)

- Training**
Ongoing technical assistance for first-year and second-year participating farmers across Italy
- Expert Knowledge**
Workshops and field visits with expert agronomists
- Innovation**
Transfer of expertise on the latest techniques of rice cultivation
- Verification & Benchmarking**
Rating and monitoring Improvement through the FSA

Food and Agriculture Organization of the United Nations

Dairy Asia
for health and prosperity

DAIRY ASIA
TOWARDS SUSTAINABILITY
Melina Lamkowsky
SAI Platform Meeting, 25 April 2017

快速发展的农业与农业食品行业

作物产出量

畜产品产出量

产出(销售)价值的结构

驱动因素:

- 城镇化、收入增长
- 膳食结构变化
- 政策: 农业技术、基础设施、规模化生产

China's changing agri-food sector

Crop output

Livestock product output

Structure of output (sales) value

Drivers:

- Urbanisation & rising incomes
- Dietary change
- Policies: technological innovation, infrastructure, input reduction

Bayer

Science For A Better Life

Working together for sustainable agriculture

Joining hands to advance sustainable crop production in China

致力于本土化的可持续农业发展——以梦为马，不负韶华

AN Jianping – Enterprise Key Account Manager, Bayer

SAI Platform Annual Conference – April 24 – 26, 2017



25 APRIL - ENGAGEMENT SESSIONS

SAI Platform's unique role in promoting sustainable agriculture
Technology and innovation for small-holder farmers in China and Asia

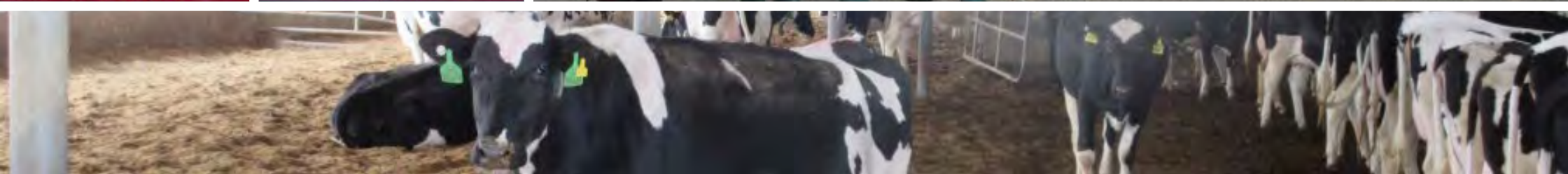
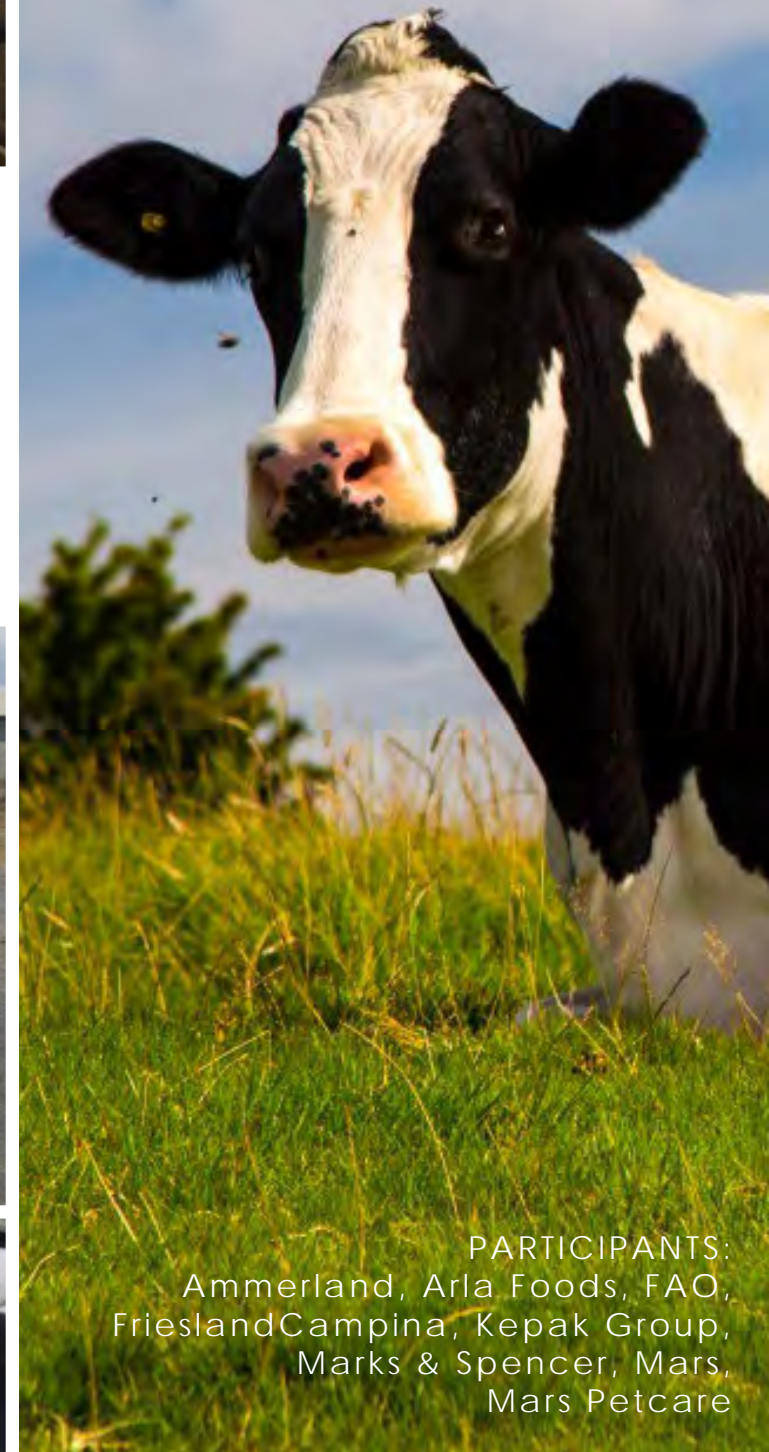


DAIRY FIELD VISIT



DAIRY FIELD VISIT Shuangcheng, Heilongjiang province Kindly organised by Nestlé

The Heilongjiang province has a long dairy tradition. It is known for its fertile soil and has much more land per farmer than further inland. On this visit, we visited the Nestlé Dairy Farm Institute to learn about their training programme and collaborations. We met with Chinese farmers and visited two different scale Chinese dairy farms. We heard about the Chinese dairy reality and its challenges and opportunities.



PARTICIPANTS:
Ammerland, Arla Foods, FAO,
FrieslandCampina, Kepak Group,
Marks & Spencer, Mars,
Mars Petcare



DAIRY FIELD VISIT LEARNINGS

"My main take-away is the mind-blowing speed of change in the Chinese dairy sector. How they responded to the melamine-crisis with restructuring the sector, how they embrace sharing of best-practice such as the Nestlé research center, and how that is then implemented in farms."

"It was encouraging to see how much effort goes into more sustainable and efficient livestock farming with best practices developed and shared by Nestlé and intertwined collaboration of other global players within the field. Seeing this new model of pre-competitive collaboration indicates the way we all will have to develop towards within the years to come."

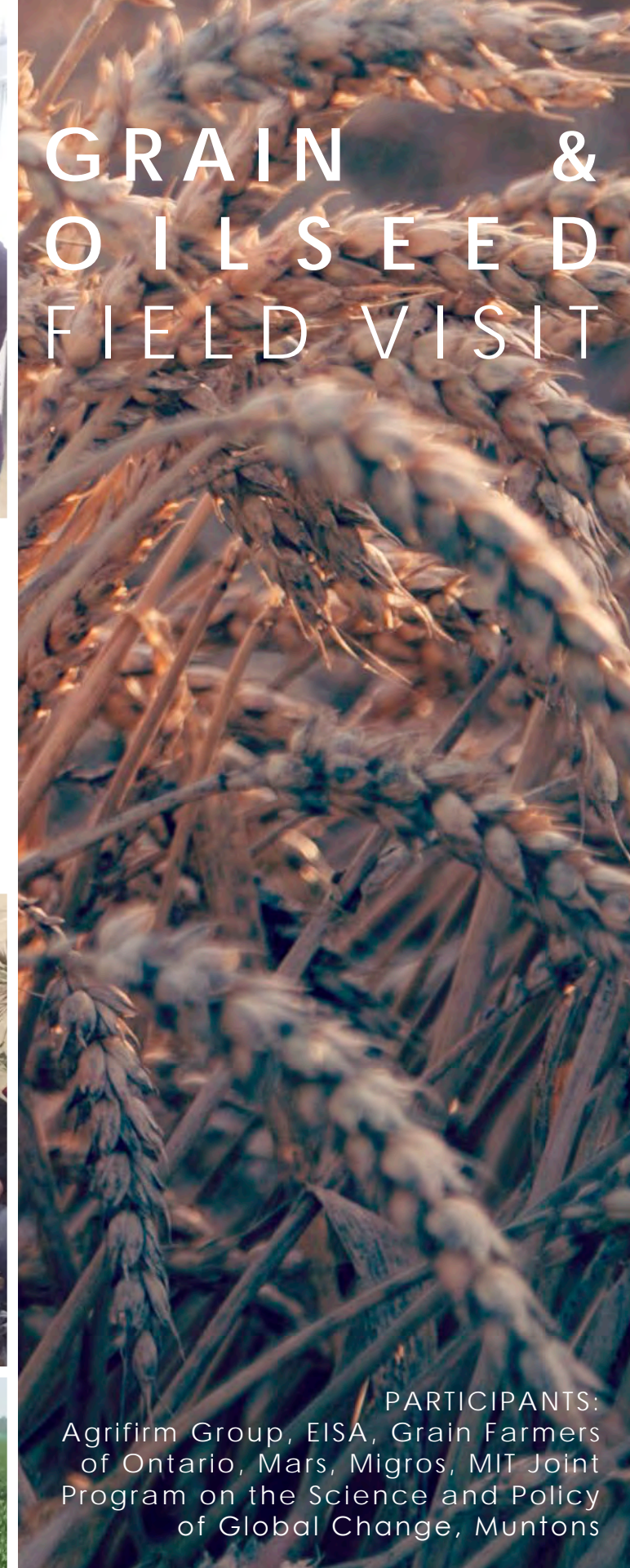
"The sector is currently heavily financially supported by the government (direct cash support to set up farms and domestic market protection that keeps prices above world market). Not yet, but I could see the sector becoming competitive in the future."

"The complexity of nutrient circulation in dairy production is manifested as a challenge in large dairy herd operations. I think it is a challenge how to link dairy herd management with crop rotation management suitable for the region. How to make use of the enormous amounts of manure these large operations generate. The system has challenges ahead in improving the sustainability performance with regard to nutrient cycling, minimizing ground- and surface water pollution and loss of nitrogen in ammonia and nitrous oxide from the storage in the large lagoons."

"I particularly note the generosity and professionalism shown by our Chinese hosts during the field trip, and shown by Nestlé in emphasizing that the dairy research center is for the sector rather than only for their company."

I think that is really the spirit we should all embrace in moving forward, strengthening the sector both locally in China and globally in SAI Platform and the DSF.

It was a truly inspiring trip!"



GRAIN AND OILSEED FIELD VISIT

Dezhou City, Shandong province

Kindly organised by the Institute of Food Science and Technology (IFST),
CAAS

During this field visit, we learnt about China's latest standardised farming and large-scale intensive food processing methods. To do this, we visited three operations in Shandong Province, just south of Beijing.



PARTICIPANTS:
Agrifirm Group, EISA, Grain Farmers
of Ontario, Mars, Migros, MIT Joint
Program on the Science and Policy
of Global Change, Muntons



GRAIN & OILSEED FIELD VISIT LEARNINGS

“I learnt more about the way how public-private partnership flourishes in China. There are focused and powerful plans on how to optimize crop yields without conflicting with food quality and food safety, as with the R&D department of the Institute we visited.”

“There are a lot of impressive examples of vertical and horizontal chain integration such as the processing and packaging station for vegetables and the wheat mill with production sites for consumer products and an own farm for fattening pigs and own biofuel installations.”

“The discussions between the participants highlighted what are the changes we expect when it comes to commodity trade about 10/20 years from now and the role you want to play with your own company/sector.”

“We gained insights on how urbanization is impacting on agriculture, i.e. the challenge to keep young people interested in agriculture and keep them in the rural areas. Young people look to cities for opportunities and don't stay in rural areas which is causing labour issues.”

“In order to drive sustainability and sustainable intensification of agriculture systems, driving yield input is a key variable. As we heard in presentations throughout the seminars, less than 50% of irrigation water reaches the field. I think that with greater emphasis on topics such as irrigation efficiency, nutrient, genetics etc, yield can and will improve, improving the sustainability of the crop.”



FRUIT FIELD VISIT

Yantai, Shandong province
Kindly organised by Danone

On this field visit, we learnt about strawberry and peach cultivation. We visited a hot greenhouse using solar power only and a strawberries factory in the Shandong province. The tour included issues such as waste management, use of agri-chemicals, measurements of water consumption, health and safety for employees and more.



PARTICIPANTS:
Agrana, The Coca-Cola Company,
Danone, Döhler, Ferrero, Heineken,
innocent drinks, Netafim,
SVZ International



FRUIT FIELD VISIT LEARNINGS

“Generally, the rural and agricultural development in Shandong area is far better than expected. However, I believe that the development status in this province cannot represent the entire Chinese rural and agricultural scenario. It is mainly because of the influx of foreign investment in the area since the 80s, and market and trade liberalization. Coupled with domestic policy reform, foreign investors brought in technology and knowledge to advance local fruit agricultural practices (e.g. we’ve seen a lot of greenhouse cultivation), generating higher household income in the area (e.g. most village houses we saw were big in size and well maintained).”

“Farmers in Shandong were among the first to expand into fruit production from grains, owing to the rising demand for higher-value fruits.”

“I am particularly interested in the labour aspect. Below are some general observations and understandings:

Working contracts are not issued between the peach farmer and workers. Employer-employee relationship is highly based on trust and community solidarity.

All family members help pick peaches during the harvest period, including children and elderly. They are not allowed to work under extreme weather conditions (e.g. heavy rainfall). No seasonal workers are hired. All children go to school in the village. Helping out their family performing agricultural work in spare time is very common.

Men earn more than women, mainly owing to the different types of work tasks. Wages are paid after the harvest period.

No first aid kit is provided at the farm. In case of accident, farmers will send the injured to the nearby hospital. There is a general lack of awareness of first aid. Most people in the rural area believe accidents will not happen.”

“There is a significant off-farm employment trend on fruit production. More and more of the younger cohorts in the labour force are moving out of agriculture. This implies a challenge in the continuous expansion of fruit production. If China is to retain its comparative advantage (cheap labour) in fruit production in the long term, labour-saving technology is essential.”

“Looking at the water and soil management:

Water management is free and is one of the most important things, though some improvements in technology are necessary.

An effort to maximize nutrient profile based on historical experience is done by the farmers.

There is limited soil erosion due to the very good structure of terraces.”



TEA & VEGETABLE FIELD VISIT

TEA AND VEGETABLE FIELD VISIT
Zhangzhou, Fujian Province
Kindly organised by Cheng Qiu

On this field visit, we learnt about different vegetable farming practices, conventional smallholder rice farming practices, and best sustainable practices used for producing organic tea in China. We visited a 400-acre ecological tea plantation located in the mountains of Fujian province, learn about the cultivation, manufacturing, processing, packaging, and wholesaling processes of the tea, and the technologies used for quality control. We also visited small-scale organic vegetable farming, conventional vegetable farming, and smallholder rice farming. We learnt about different farming practices in China, and the development of ecological and organic agriculture in China.

PARTICIPANTS:
Ferrero, GIZ, GLOBALG.A.P.,
Ingredion, Linkage Farm Frites,
PepsiCo, The Nature Conservancy
Brazil, Unilever

A close-up photograph of vibrant green tea leaves, showing their serrated edges and prominent veins, serving as a background for the title.

TEA & VEGETABLE FIELD VISIT LEARNINGS

“The field visits for Tea and Vegetable were extremely interesting. I learned that there are growers in China seeking to be more sustainable in their agricultural practices because it is a profitable business model, particularly at the tea farm, where the growers faced the challenge of getting organic farming off the ground in China, where it was thought to be virtually impossible.

The grower shared with the group the struggles and solutions they had found along the way, like the various approaches to pest management they have taken over the years. The farm visits also highlighted for me the value that SAI could bring to these growers, helping to identify areas of need (through FSA) and sharing resources to fill those needs.”

“During the visit to the tea farm, there were lots of attendants from the city government, including local agricultural leaders. This - combined with visitors from SAI Platform, NGOs, and industry - made for very interesting conversation at the end of the tour. It became obvious that the collective knowledge in the room could have helped solve many of the growers’ struggles. I found myself making mental notes on several of the comments and questions, as there were some learnings that could help our own agribusiness team as they engage with growers.

I particularly found the use of chickens for pest control - and the other methods that were ultimately abandoned leading up to that - to be creative and something to investigate further with some of our smaller-sized crop growers around the globe.

This conversation also highlighted for me the need to have a local network of growers, industry personnel, NGOs, and government officials to help more efficiently implement sustainable agriculture practices, particularly in areas where there farmers may have limited access to advanced technologies.”

“Good agricultural practices training is needed. For example, the government decided that the over-supply of fertilizers is not a good thing - which of course it is not - but switching over to organic fertilizers is not going to solve the problems. The farmers need to do soil and leaf analyses and get information, based on the results, on what and how much fertilizers should be applied.

Organic farming is still seen as “safe and sustainable” because “no pesticides” are applied. Food safety was never mentioned once, and as mentioned above, sustainability is not guaranteed through organic practices per se.

I also learned that the farmers are passionate and eager to learn, so we should take up the opportunities!”