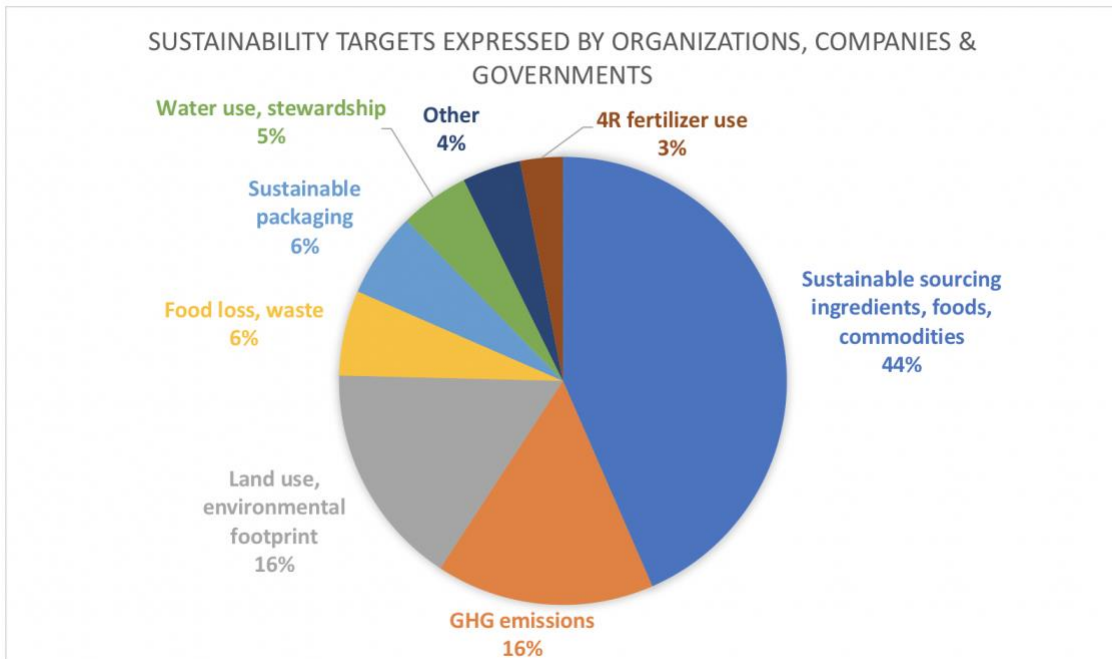


Agri-Food Sustainability Targets – Executive Summary

Summary: Across the agri-food sector ambitious targets are being set to reduce the environmental footprint of producing and supplying food. The report *Agri-Food Sustainability Targets* canvassed the practices of over 50 agri-food organizations, sector initiatives, food companies and governments from Canada and abroad and how these are influencing marketplace and national responses. While not being universally adopted, setting outcomes-based targets is becoming a key tool to add value, compete and deliver societal benefits. (To manage scope, social and health goals were not reviewed.)

Highlights: Setting outcome-based targets is common among food companies, agri-businesses and retailers, and some producer organizations, such as responsibly sourcing 100% of ingredients, reducing GHG emissions, shifting to sustainable packaging, and minimizing waste (see chart). Delivering on these often requires companies to commit their supply chains, increasing collaboration and alignment with producers. Some firms are also pledging to improve “system resilience” which reaches beyond their supply chains and could be transformational, such as improving watershed health and biodiversity. While on-farm continuous improvement has significantly enhanced ecosystem benefits and improved productivity, producers are expressing greater interest in outcomes-based metrics provided that the data adds value. New data platforms and organizations are forming to engage producers and companies to generate the relevant data and processes to verify commitments and demonstrate the value of doing so. New sector-wide initiatives, both nationally and globally, are working pre-competitively (and often with NGOs) to improve environmental sustainability and transparency. Plus, global and regional institutions are setting bold targets that are informing national policies and private sector goals. In short, stewardship targets and benchmarking are varied and here to stay.

Summary of findings: The pie chart summarizes the number and type of mentions of environmental sustainability targets for over 50 canvassed entities that expressed specific targets:



Context: Major developments are prompting agri-food players (but not all) to publish performance targets. Environmental benchmarking is being embraced by a broad variety of agri-food players to increase firm and farm-level productivity and profitability, comply with more demanding supply chain standards and meet rising consumer expectations. Capital markets are catalyzing disclosures. Institutional investors and banks are increasingly assessing corporate environmental, social and governance (ESG) risks. Pressure is rising for companies and countries, alike, to meet global obligations by 2030, notably the U.N. Sustainable Development Goals and the Paris Accord for GHGs (and new biodiversity goals will be launched in 2020). Due to the relentless impact of climate change on the global food system and, now, on questions about global food security and sector viability prompted by COVID-19, the links between social, health and biodiversity impacts and economic vibrancy will surely prompt even greater scrutiny of agri-food commitments and practices.

Canada's opportunity: At a time when the resiliency of the global food supply is paramount, Canada ought to be a recognized global leader for its performance. Thanks to continuous improvement, innovation-adoption and global leading practices and confidence in the regulatory process, Canada's food production system has one of the lowest environmental impacts anywhere. The bar is rising here and abroad to back up these credentials and mark progress. Right now, a consolidated set of metrics is not readily available to show that Canada is among the most environmentally sustainable, safest and reliable global food leaders. Indeed, other countries are seeking to declare their leadership on these claims and global indices often rank other nations performing better than Canada. Ceding Canada's leadership to others must not be an option.

About this project: A diverse group of partners is advancing the idea that a *National Index on Agri-Food Performance* is important for positioning Canada for a changing food world, conferring benefits for society, competitiveness and policy-making. While this initiative will not actually populate data sets, the project will assess how to best frame-up key indicators for a new benchmark that are relevant for producers to consumers, inclusive. This multi-disciplinary and pre-competitive initiative completes its considerations by early 2021.

Partners: Agriculture & Agri-Food Canada, Arrell Food Institute (U. of Guelph), Bayer Crop Science, Canadian Federation of Agriculture, Canadian Produce Marketing Association, Canadian Wildlife Federation, Chicken Farmers of Canada, Enterprise Machine Intelligence & Learning Initiative, Environment & Climate Change Canada, Fertilizer Canada, Food, Health & Consumer Products of Canada, Global Institute for Food Security, Loblaw Companies Ltd., Maple Leaf Foods Inc., National Research Council, Nutrien, Protein Industries Canada, Pulse Canada, Standards Council of Canada, Statistics Canada, Syngenta, TrustBIX Inc.

Next steps: Building on April and September webinars (see recordings at: <https://arrellfoodinstitute.ca/index-agri-food-performance/>; https://www.gifs.ca/events/details/national_index_on_agrifood_performance_webinar), a November 18 webinar is planned on the policy and strategic implications of developing an index. By engaging diverse stakeholders and building momentum for this idea over the course of 2020, partners will develop a final report, including recommendations on the index's scope, governance and operation for consideration by food system leaders in government, industry and among adjacent sectors.

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