

THE FOOD INDUSTRY'S PATH TOWARDS SUSTAINABILITY

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THE U.S. SUSTAINABILITY ALLIANCE



Agenda

- The U.S. Sustainability Alliance
- Sustainability of U.S. Agriculture & Food Production
- Changing Perceptions
- Sustainability: Our Global Challenge
- Questions & Answers

The U.S. Sustainability Alliance

Agri-Bulk	Animal/Seafood & Related Products	Specialty
North American Export Grain Association	Alaska Seafood Marketing Institute	Almond Board of California
USA Rice	Food Export USA Northeast	American Hardwood Export Council
U.S. Grains Council	Leather & Hide Council of America	American Peanut Council
U.S. Soybean Export Council	North American Renderers Association	Cotton Council International
U.S. Wheat Associates	U.S. Livestock Genetics Export	Food Export Association of the Midwest
	USA Poultry & Egg Export Council	Organic Trade Association
	U.S. Dairy Export Council	Softwood Export Council
	U.S Meat Export Federation	U.S. Dry Bean Council

U.S. FARMS & PRODUCTIVITY

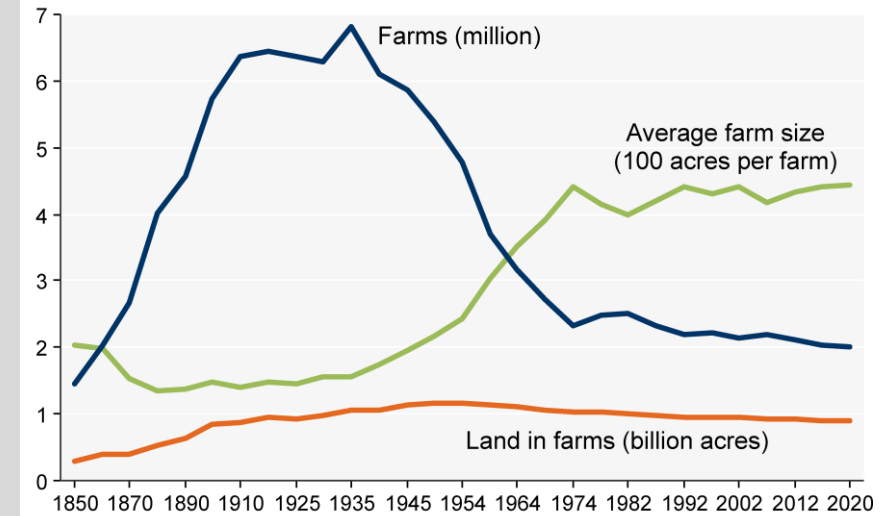
USDA 2020 Ag & Food Statistics Report

- 2.2 million farms covering 365 million hectares
- 98% are family owned & operated
- Average farm size is 178 hectares
- Agricultural output between 1945 and 2017 increased to 300% while land & labor declined
- Improved animal & crop genetics; equipment; new technologies (GMOs), precision farming
- New technologies helping farmers be more sustainable



Farms, land in farms, and average acres per farm, 1850-2020

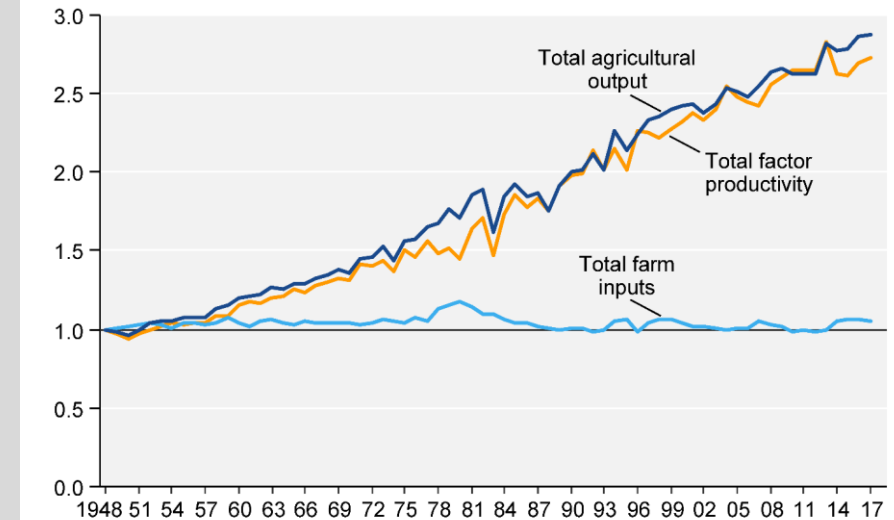
Million farms, billion acres, or 100 acres per farm



Source: USDA, Economic Research Service using data from USDA, National Agricultural Statistics Service, Census of Agriculture (through 2017) and *Farms and Land in Farms: 2020 Summary* (February 2021).

U.S. agricultural output, inputs, and total factor productivity

Index, 1948=1



Source: USDA, Economic Research Service, *Agricultural Productivity in the U.S.* data series. Data as of January 2020.

U.S. COMMITMENT TO CONSERVATION

- Conservation improvements for 80 + years
- USDA invests in conservation programs
 - 12,000 + employees in conservation
 - *\$57.6 billion dollars invested from 2014-2023*
 - USDA surveys farmers & provides production & environmental metrics
- Conservation offices in 2,200 + locations
- 19 federal laws & polices on conservation, plus state laws & industry standards
- U.S. Sustainability Alliance members develop their own sustainability programs often in partnership with other organizations



USSA: changing perceptions

Sharing the values of farmers, fishermen and foresters of the United States regarding sustainability and conservation practices

EU influencers' views of U.S. sustainability (2014)

Results

- Food & agricultural less sustainable than Europe
- Exporters need to understand EU consumer concerns
- Misinformed & negative perception of U.S. products

Interests

- Enthusiastic to learn about U.S. systems / processes
- Evidence of 'real' on-going commitment & improvement
- Support sustainability claims with hard data
- Put a human face to the issue



U.S. AGRICULTURE, FISHERY & FORESTRY

Toward the Shared Goal of Sustainability

Predictable, Consistent Supply

Diverse Agricultural Profile

Ongoing Environmental Improvement



Our Foundation

- Federal Laws
- State Laws
- Voluntary Schemes
- Peer-reviewed studies
- Federal Annual Audits

U.S. LAWS AND POLICIES RELEVANT TO AGRICULTURAL SUSTAINABILITY

Department of Agriculture

Conservation Compliance

Conservation Reserve Program

Conservation Stewardship Program

Environmental Quality Incentives Program

Agricultural Conservation Easement Program

Technical Assistance and Other Conservation Programs

Coordinated Framework for the Regulation of
Biotechnology

National Organic Program

Lacey Act

U.S. LAWS AND POLICIES RELEVANT TO AGRICULTURAL SUSTAINABILITY

Department of Commerce

Magnuson-Stevens Fisheries Management & Conservation Act

Environmental Protection Agency

Clean Air Act (including air emission aspects of CERCLA and EPCRA)

Clean Water Act

Renewable Fuel Standard and Biofuels Policy

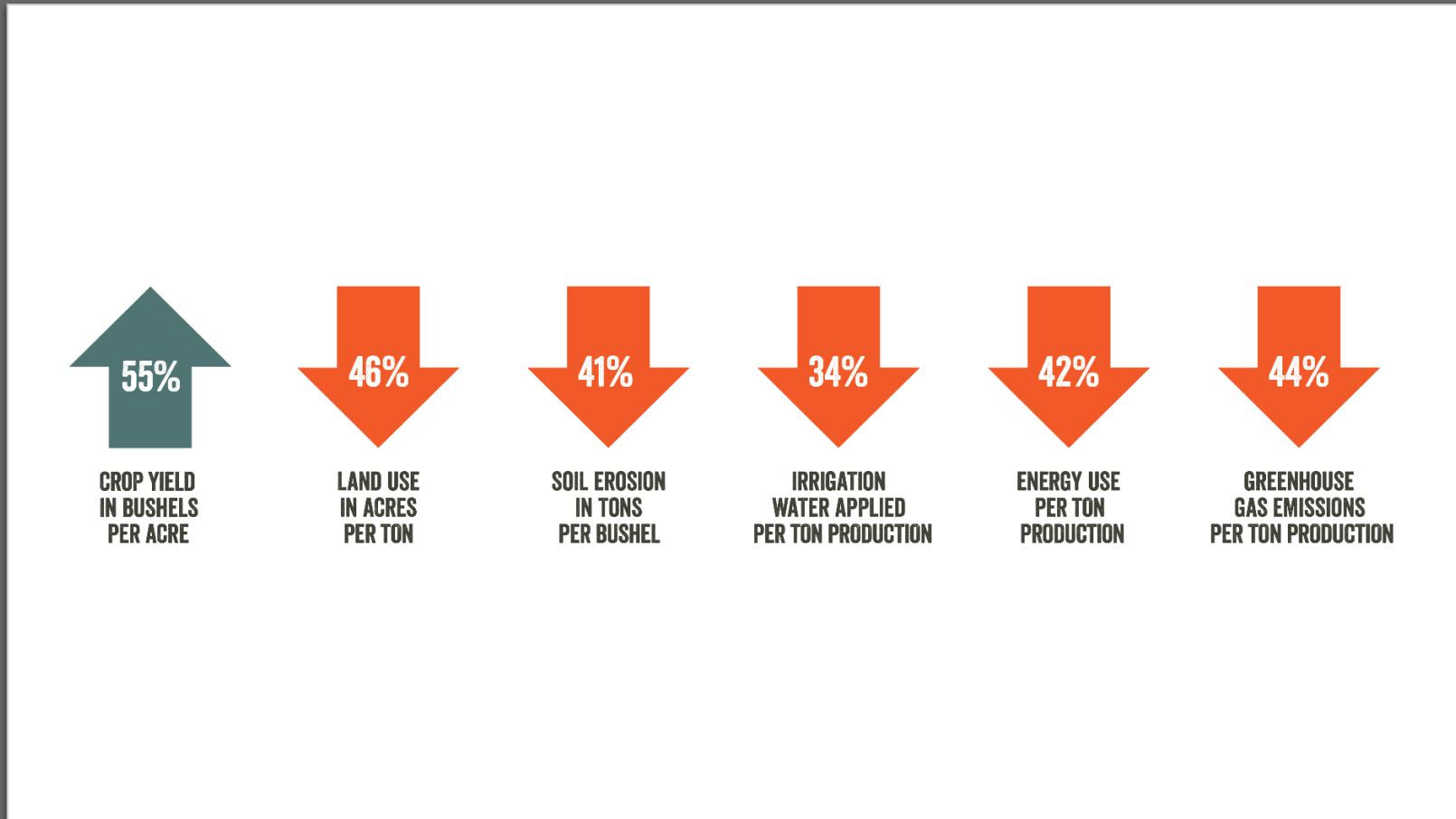
Federal Insecticide, Fungicide, and Rodenticide Act

U.S. Seafood

- For more than 40 years, U.S. seafood fisheries have been required to meet 10 strict national standards of sustainability
- Since 2000, U.S. fisheries have rebuilt 32 fish stocks, which means nearly two-thirds of once-depleted fish stocks are now thriving
- Over-fishing is at an all-time low and 10 additional stocks were removed from the over-fishing list

U.S. Soy

Reduction in resource impacts to produce soybeans



Index per ton resource impact to produce U.S. soybeans 1980-2015

SOURCE: NATIONAL INDICATORS REPORT, FIELD

TO MARKET 2016

U.S. Soy Continuous Improvement Goals

By 2025, U.S. soybean farmers aim to:

- Reduce land use impact by 10%
- Reduce soil erosion by 25%
- Increase energy use efficiency by 10%
- Reduce total greenhouse gas emissions by 10%

These continuous improvement goals were adopted by key U.S. soy organizations in 2014 and are based on 2000 benchmark, using Field to Market National Indicators Report.

U.S. RICE

U.S. rice farmers produce more than 10 million tons of rice a year. A study of the industry's impact over a 20-year period on five key environmental factors:

- 21 percent decrease in land use
- 33 percent reduction in water use
- 43 percent decrease in soil erosion
- 52 percent reduction in energy use
- 29 percent reduction in soil methane

Source: U.S. Rice Resource Efficiency

2030 goals

- 10% increase in land use efficiency
- 10% improvement in biodiversity
- 8% reduction in soil loss
- 13% reduction in GHG emissions
- 13% reduction in water use
- 10% reduction in energy use

USSA some activities

- Website with accessible language capability
- Social media outreach
- Industry groups' Fact Sheets in 5 languages
- One-page overviews of Federal policies
- Monthly newsletter
- Media outreach
- Speaking opportunities & joint seminars
- Outreach in 11 EU members states + UK



SUSTAINABILITY: OUR GLOBAL CHALLENGE

- Foster an understanding of our shared values and shared goals
- Establish U.S. producers as good-faith participants in the global challenge of sustainability, based on a century of environmental protection and conservation
- Develop relationships with EU stakeholders to ensure ongoing dialogue & exchange of information

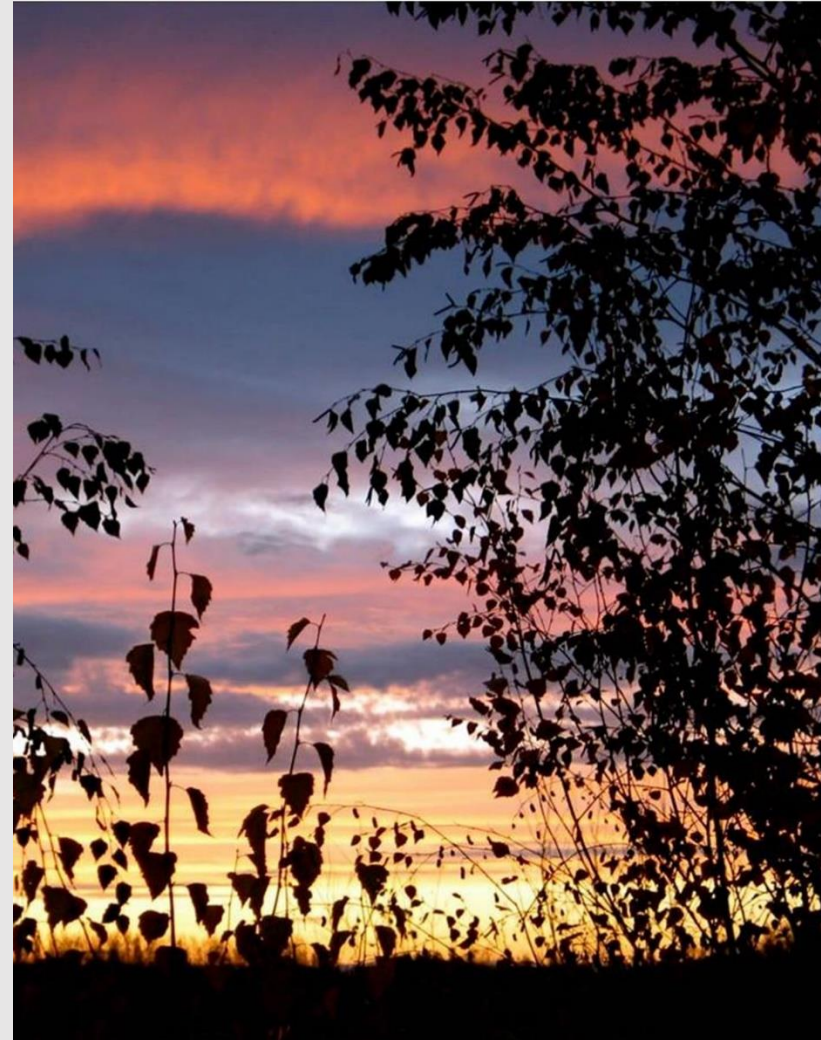


SUSTAINABILITY: OUR GLOBAL CHALLENGE

DIFFERENT PATHWAYS TO THE SAME GOAL?

- UN Sustainable Development Goals
- EU Green Deal
 - Biodiversity
 - Farm to Fork
 - Sustainable Food Systems
- U.S. Sustainable Productivity Growth
- Agriculture Mission for Climate
- U.S. & EU Collaborative Platform on Agriculture

The common goal will best be reached by mutual understanding & recognition of the different roads to get there



THANK YOU

www.thesustainabilityalliance.us

