## INTERNATIONAL SUSTAINABILITY SUMMIT Taking Action Towards Harmonized Sustainability Practices for the Global Produce Supply Chain Friday April 26 2024 | Vancouver





**Global Coalition of Fresh Produce** 



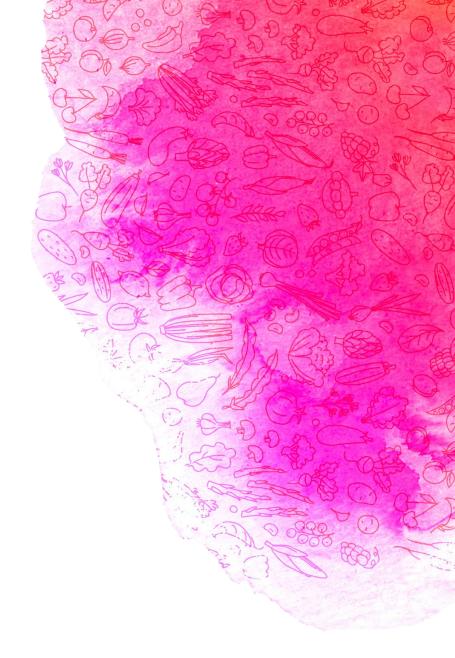
# Thank you to our sponsors!













# **Sinclair**

# For the fresh produce supply chain, sustainability ...

is of critical importance

# is a complex challenge

# <u>must</u> take a harmonized approach

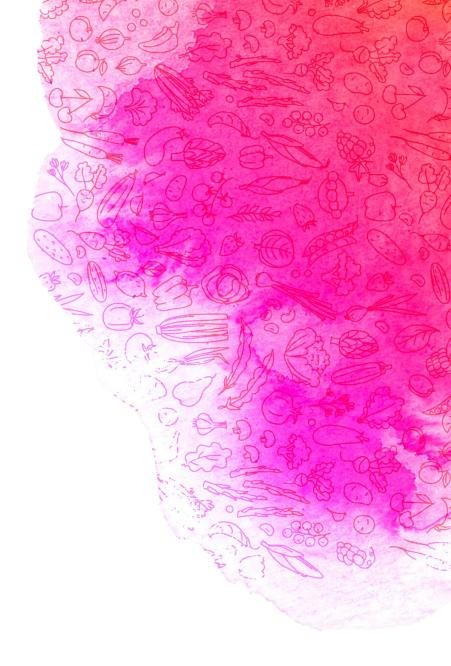
# Today's Summit Goals...

# • Learn

# Share & Challenge

 Shape action towards harmonized sustainability practices





# Today's Summit Goals...

- Breakout Session: Help shape a Draft Fresh **Produce Sustainability Charter**
- Why develop a Fresh Produce Sustainability **Charter?** 
  - To promote the importance of sustainability To advocate for support of sustainability efforts To accelerate adoption of sustainability actions To achieve the desired <u>and</u> required state of sustainability

#### **Opening Remarks** 01 Minister Lawrence MacAulay Agriculture & Agri-Food Canada

#### **Keynote Speaker** 02 John Anderson, Chairmain, CEO & Managing Partner

Garland Perkins, Director, Innovation & Sustainability OPPY | The Oppenheimer Group

#### The State of Sustainability – Efforts Impacting 03 **Global Produce Supply Chains**

Dr Yogendra Chaudry, SSCI Erika Luna, International Institute for Sustainable Development Cheryl Sullivan, International Featured Standards Joanna Nathanson, Freshfel

### **Decoding Environmental, Social and** 04 **Governance Reporting & Investing Trends** Graeme Blair, Royal Bank of Canada Jonathan Belair, Managing Partner, Power Sustainable Lios

# TODAY'S AGENDA



## **Aligning Global Produce Supply Chain** 05 Aligning Global I House with UNSDGs -Lessons to Date

Jacob Lawes & Dr. Hans Maurer United Fresh New Zealand

### Sustainability in Action - Produce Sector 06 Leaders Taking a Systems-Centric Approach to Sustainability

Tom Pierce, Sobeys Matt Aronson, Verdant Technologies

John Mesko, Potato Sustainability Alliance Gerd Uitdewillingen, COPELAND

**Breakout Session | Taking Action Towards** 07 Harmonized Sustainability Practices for the **Global Produce Supply Chain** 

**Breakout Session Reports** 80 **Taking Action – Next Steps & Action Items Closing Remarks** 

# TODAY'S AGENDA

# **OPENING REMARKS | AGRICULTURE &**

# AGRIFOOD CANADA International Sustainability Summit Friday April 26 2024 | Vancouver





**Tom Rosser** Associate Deputy Minister Agriculture & Agrifood Canada

Honorable Lawrence MacAulay

Minister Agriculture & Agrifood Canada

## **OPENING REMARKS | AGRICULTURE & AGRIFOOD CANADA**

### **awrence lay** er food Canada

## KEYNOTE SPEAKERS | A GLOBALLY SUSTAINABLE FRESH PRODUCE SUPPLY CHAIN: CHALLENGES, **BARRIERS & OPPORTUNITIES** International Sustainability Summit Friday April 26 2024 | Vancouver





### John Anderson

Chairman, CEO & Managing Partner OPPY | The Oppenheimer Group **Garland Perkins** Director, Innovation & Sustainability OPPY | The Oppenheimer Group

## KEYNOTE SPEAKERS | A GLOBALLY SUSTAINABLE FRESH PRODUCE SUPPLY CHAIN: CHALLENGES, BARRIERS & OPPORTUNITIES



# **A Globally Sustainable Fresh** Produce Supply Chain: Challenges, **Barriers and Opportunities**

John Anderson Chairman, CEO and Managing Partner at Oppy **Garland Perkins** Director, Innovation and Sustainability at Oppy







Growing, marketing and distributing over 100 varieties of fresh produce from 27 countries to 1,300+ retailers around the globe for 165 years.











# The WHY Challenges, Barriers and Opportunities



Sustainability is transitioning from a marketing function of the business to compliance



## Challenge – We're Not There Yet.





# **Opportunity: We can write the playbook**



# **Standardization Efforts Underway**





## INTERNATIONAL FRESH PRODUCE ASSOCIATION





## National Index on Agri-Food Performance

### Centre for Agri-Food Benchmarking



Freshfel Environmental Footprint Initiative



# Where to begin



## **Opportunity = Create and execute a sustainability strategy**



### Establish a timeline

Focus strategy on tangible goals

Leverage compliance in broader sustainability efforts



# **Outsource Expertise**

## **C**CarbonCloud

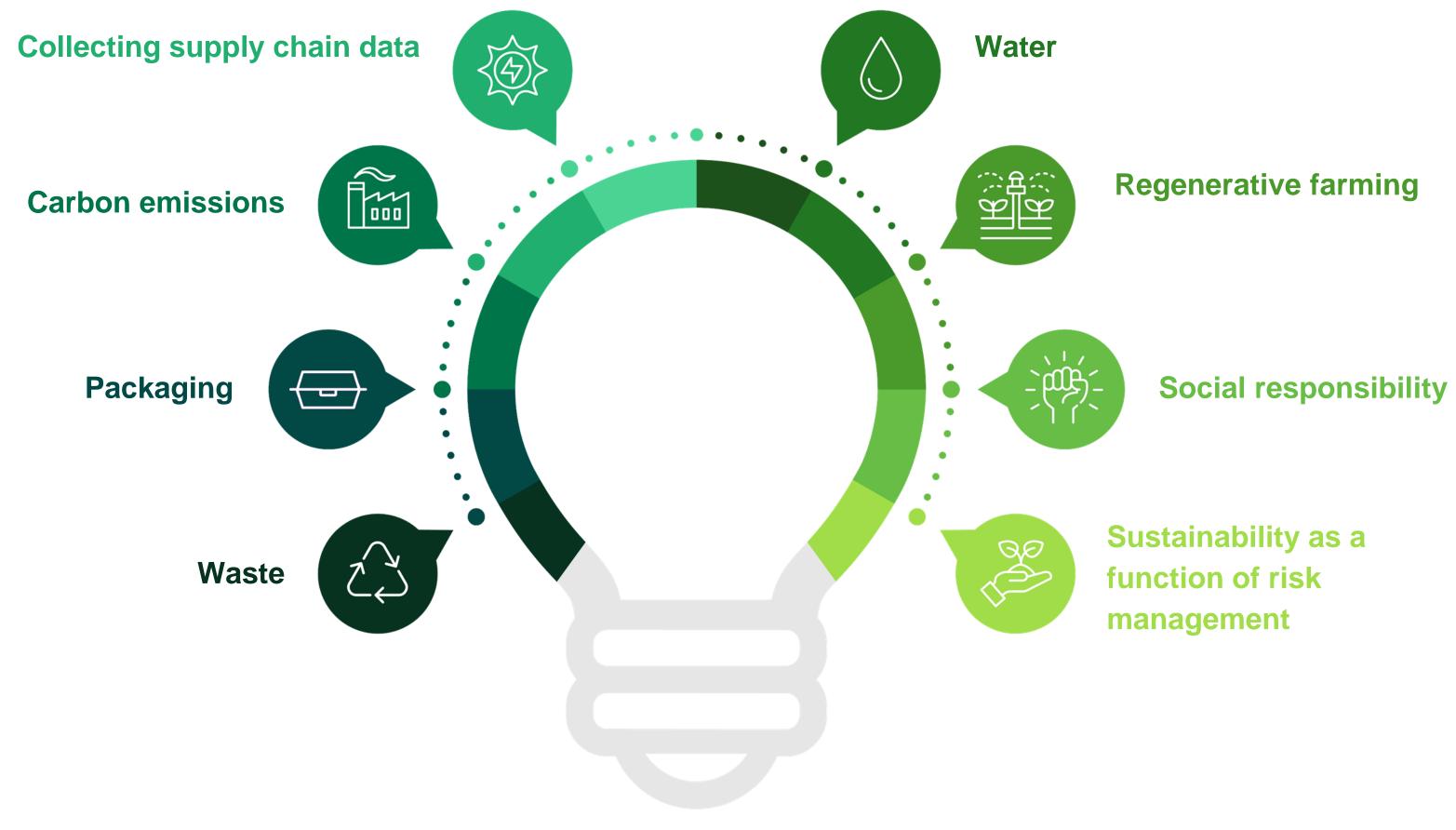






Producing Sustainable Solutions





# **Collecting supply chain data**



Data needs vary by customer and regulations

Barrier

Data collection is difficult & complex

## Opportunity

Start small with existing data, then expand



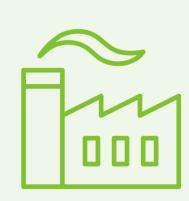


## Sustainable Packaging - Challenges & Barriers



## **Trendy Yet** Difficult

A big focus for sustainability efforts with some successes however multiple factors make progress slow and disjointed.



## Waste Infrastructure Insufficient

Incapable of processing a variety of materials.



## Cost **Prohibitive**

The price of alternative packaging materials is often cost prohibitive



## **Can Have** Inferior Performance

Alternative materials can impact the quality of the product, not to mention potential food safety issues.



## **Industry Efforts** Lack Cohesion

Packaging priorities often differ between customers. No agreed upon best practices.

# The Opportunity

## Revolutionize the way our products are packaged, resulting in little to no packaging waste going into the environment!

## **Sustainable Packaging – The Opportunity**



## **Define Best Practices**

Identify core sustainable packaging practices by balancing customer expectations with what's operationally viable for growers and marketers.



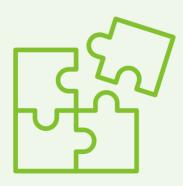
## Reference Existing **Guidelines**

Utilize benchmarks set by APR Design® and CPMA's sustainable packaging guide.



## Be a **Participant!**

Engage in industry committees like the IFPA and CPMA to influence and stay abreast of sustainable packaging trends and innovations.



## **Practical** Implementation

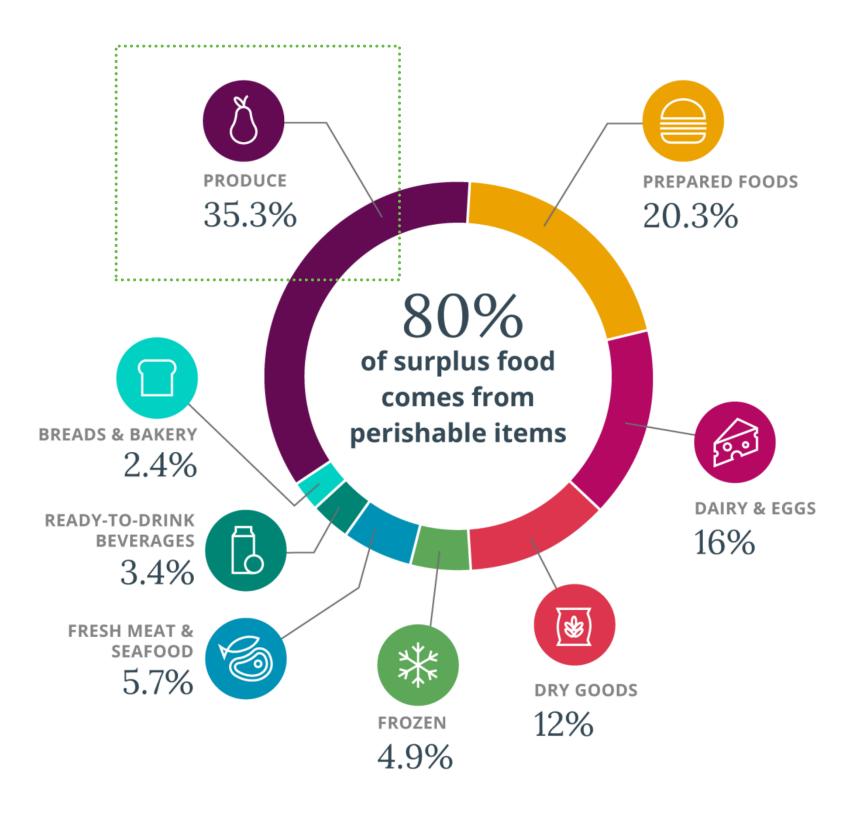
Look for the easiest ways to make changes and build from there. E.g. Replacing nonrecyclable packaging with recyclable.



## Share and **Collaborate**

Share successes and failures with our peers and competitors. Packaging should not be used as a competitive advantage.

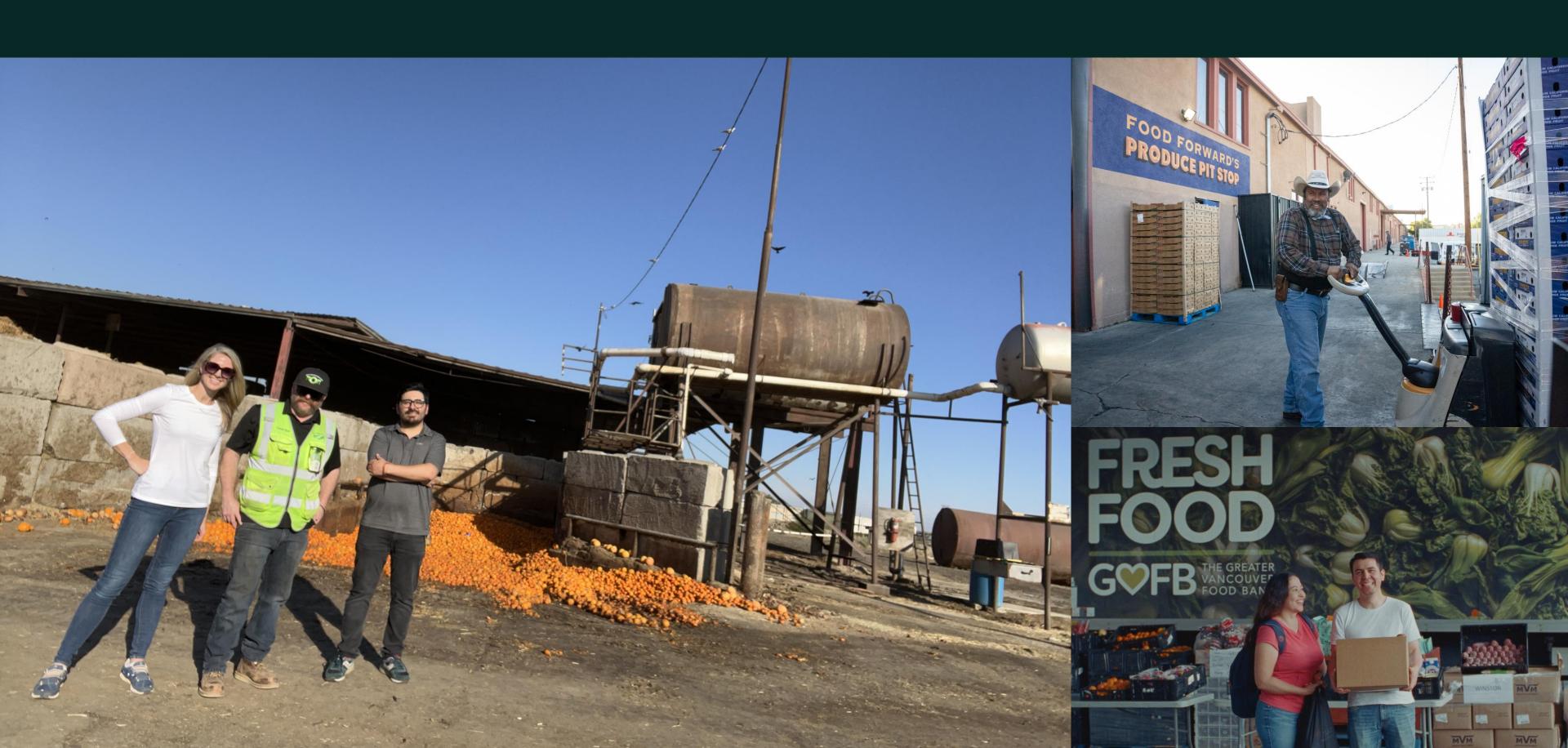
## Waste – The Challenge



## Waste – Barriers



# The Opportunity



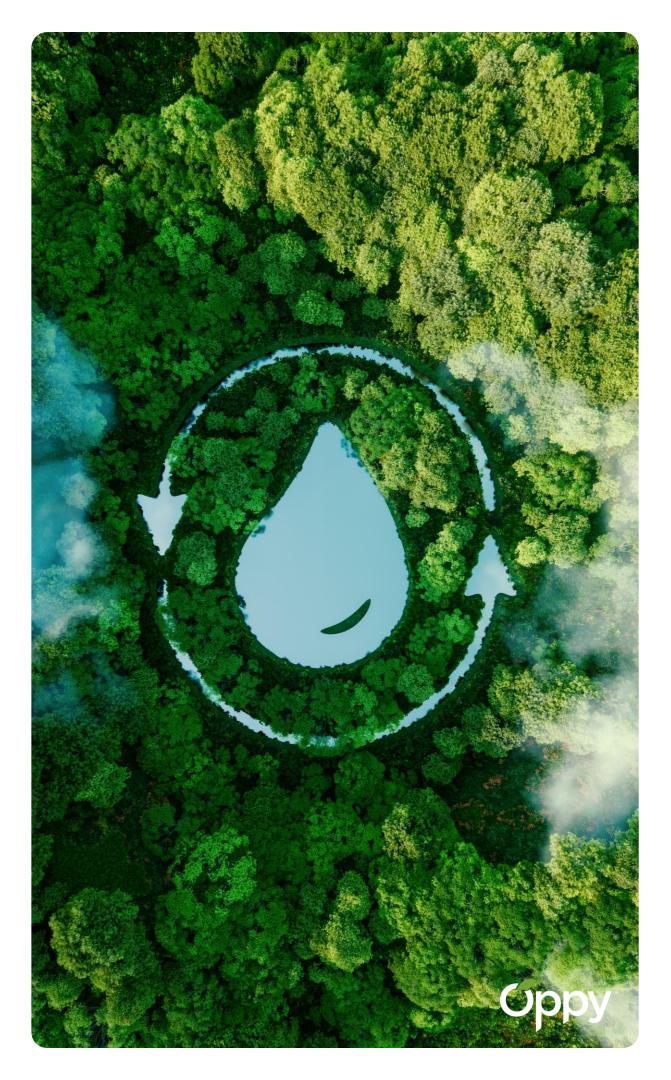
## Water

## Challenges

- We rely on water and it's a finite resource
- Competition for water will increase
- Already experiencing severe droughts, flooding, water shortages and more

## **Barriers**

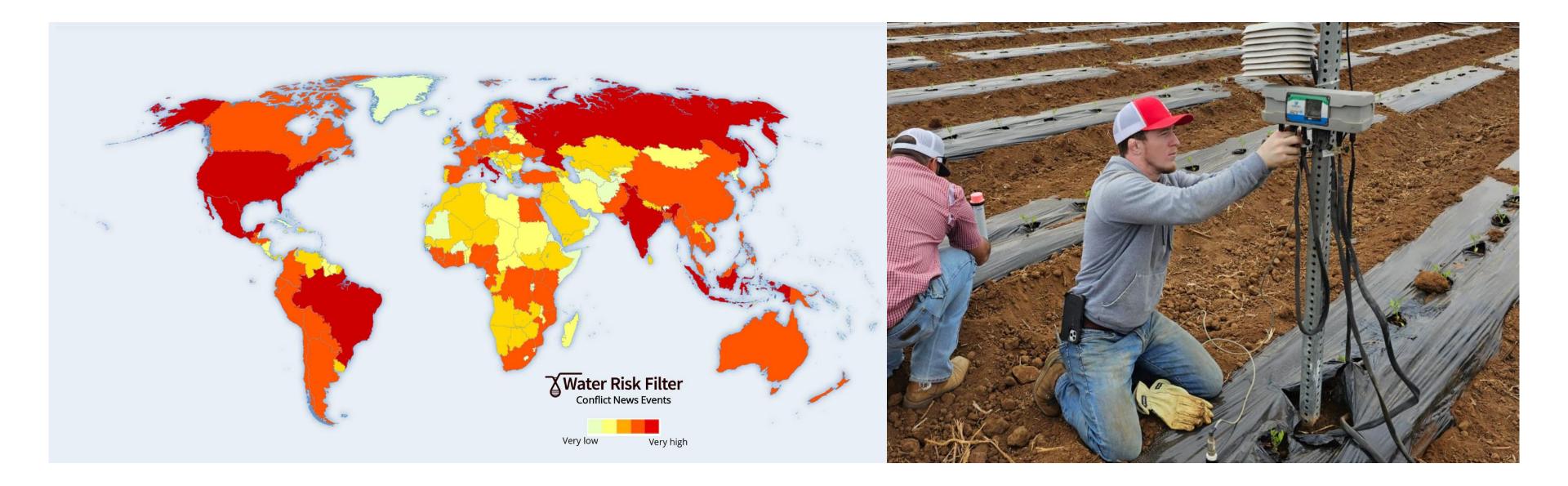
- Global challenge with water is the "big picture"
- Each organization's dependence on water varies
- Knowing what to do is difficult
- Trying something new is often risky, costly



# The Opportunity



## **Practical Examples**



## **Regenerative Agriculture**



## **Social Responsibility**

- Consumers' shopping habits more influenced by ethical and social impacts of their purchases
- Certified product increasingly influencing procurement decisions
- Utilized for risk management
- Volume of certified product is increasing

## It's the right thing to do but it's also good for business.



## Sustainability as a Function of Risk Management



### Sustainability for Vendor Requirements

Sustainability plays a role in determining which vendors retailers select for business or certain countries or growing regions required to have additional certifications.



## **Evolving Standards and Compliance**

Extreme variability in expectations and requirements. Barrier = Having sufficient time and resources to navigate new areas of the business now deemed to be risky.



## A Resilient Supply Chain Through Transparency

E.g. The Supply Chains Act's new reporting requirements are a new risk to the business.Another example of the bar for what's expected being raised.

Conclusion



#### PEOPLE $\sim \sim \sim$

Social variables dealing with community, education, equity, social resources, health, well-bring, and quality of life

BEARABLE

EQUITABLE

### SUSTAINABLE

VIABLE

## PLANET

Environmental variables relating to natural resources, water & air quality, energy conservation & land use

## PROFIT

Ecomonic variables dealing with the bottom line & cash flow

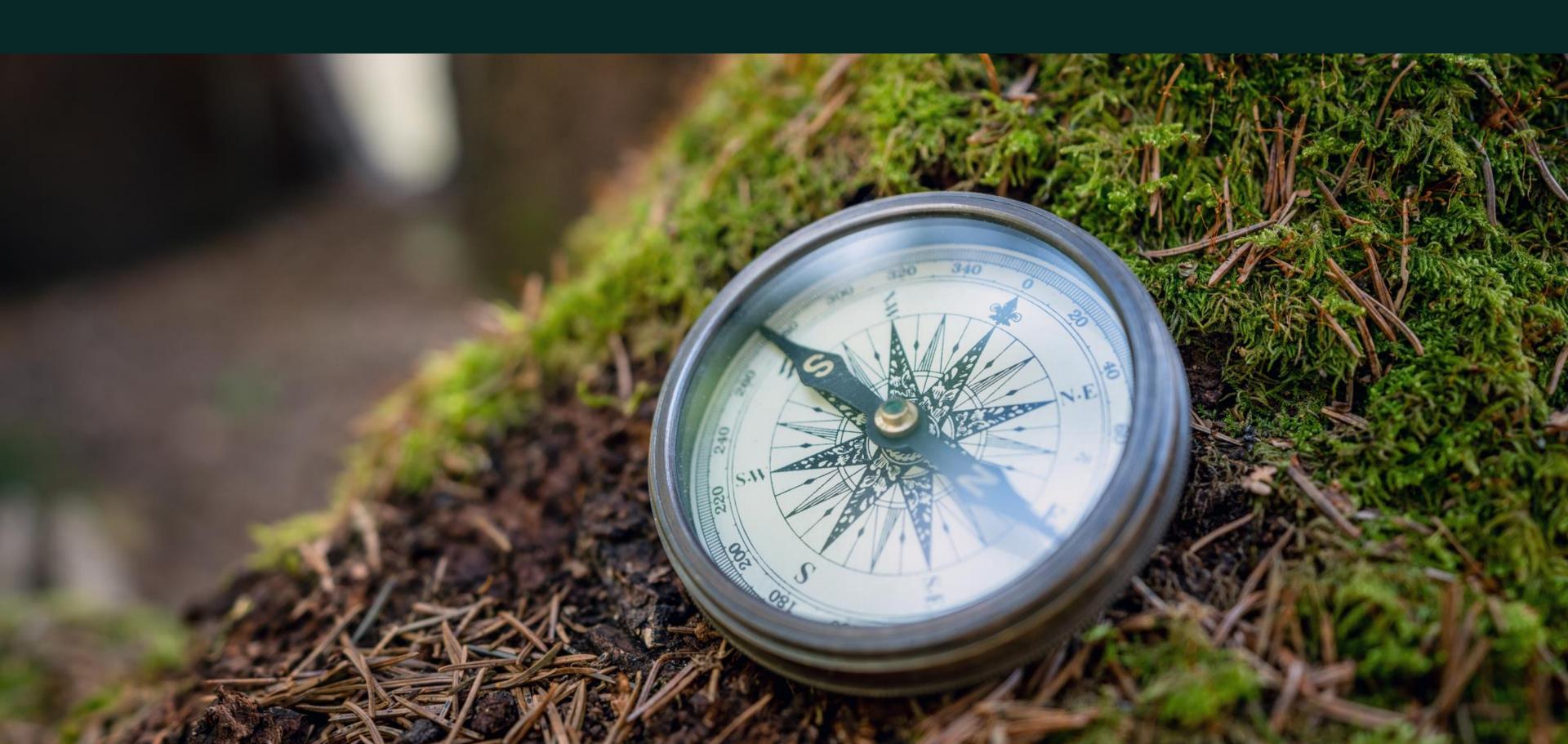


- New ways to generate revenue and profits, such as attracting new customers
- Lower energy consumption and costs
- Higher employee retention rates and attracting new talent
- Enhanced brand reputation that can lead to higher sales
- Improved productivity and reduced operating costs through achieving efficiencies
- Increased transparency and accountability, potentially attracting new investors.

## Is approaching business with a "three Ps" assessment tough? Can it be done?

# Can it be good for business? Absolutely!

## Authenticity



## "Collaboration Over Competition!"







ECO FARM

HOME







## Thank You!

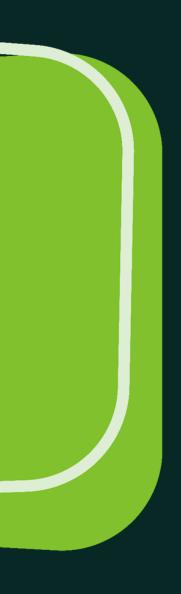
## Garland.Perkins@Oppy.com







# Q & A







### John Anderson

Chairman, CEO & Managing Partner OPPY | The Oppenheimer Group **Garland Perkins** Director, Innovation & Sustainability OPPY | The Oppenheimer Group

## KEYNOTE SPEAKERS | A GLOBALLY SUSTAINABLE FRESH PRODUCE SUPPLY CHAIN: CHALLENGES, BARRIERS & OPPORTUNITIES

PANEL THE STATE OF SUSTAINABILITY -EFFORTS IMPACTING GLOBAL PRODUCE SUPPLY CHAINS International Sustainability Summit Friday April 26 2024 | Vancouver







### Dr Yogendra Chaudry

VP, Professional Services & ESG SSCI/ ECO Canada

### Erika Luna

Policy Analyst International Institute for Sustainable Development

## **Cheryl Sullivan**

International Featured Standards, PAC Next Consultant

## PANEL | THE STATE OF SUSTAINABILITY – EFFORTS IMPACTING GLOBAL **PRODUCE SUPPLY CHAINS**



## Richard Schouten

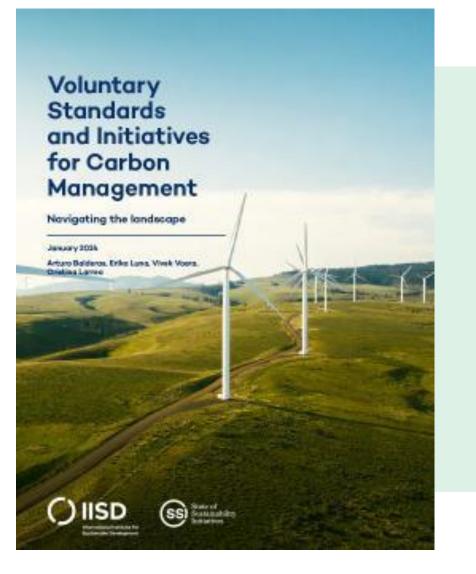
Director Fresh Produce Centre -**GroentenFruit Huis** 

#### Tamara Muruetagoiena VP Sustainability

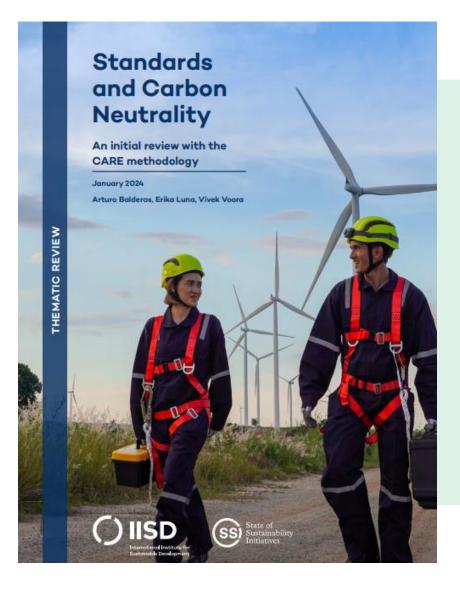
IFPA (moderator)







- Type of VSICMs
- Main findings
- Takeaways

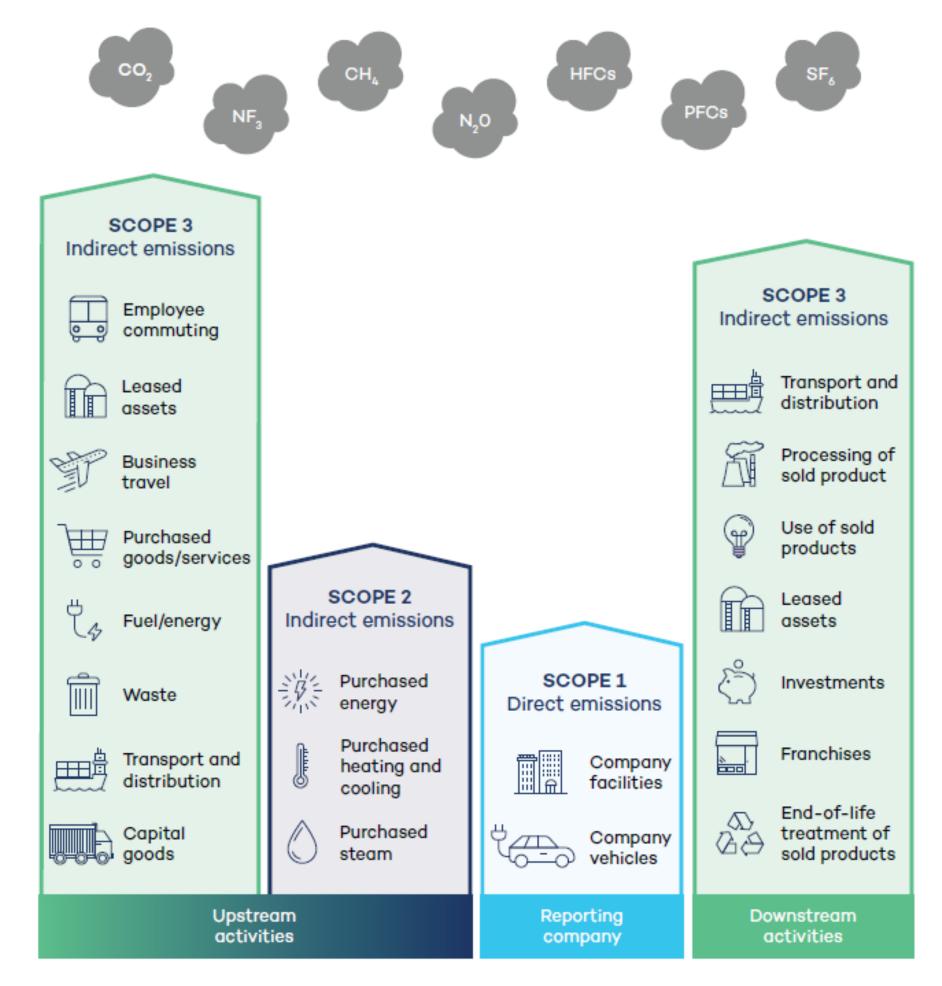


https://www.iisd.org/ssi/publications/voluntary-standards-initiatives-carbon-management/

 Benchmarking methodology

- Benchmarking results
- Main findings
- Takeaways

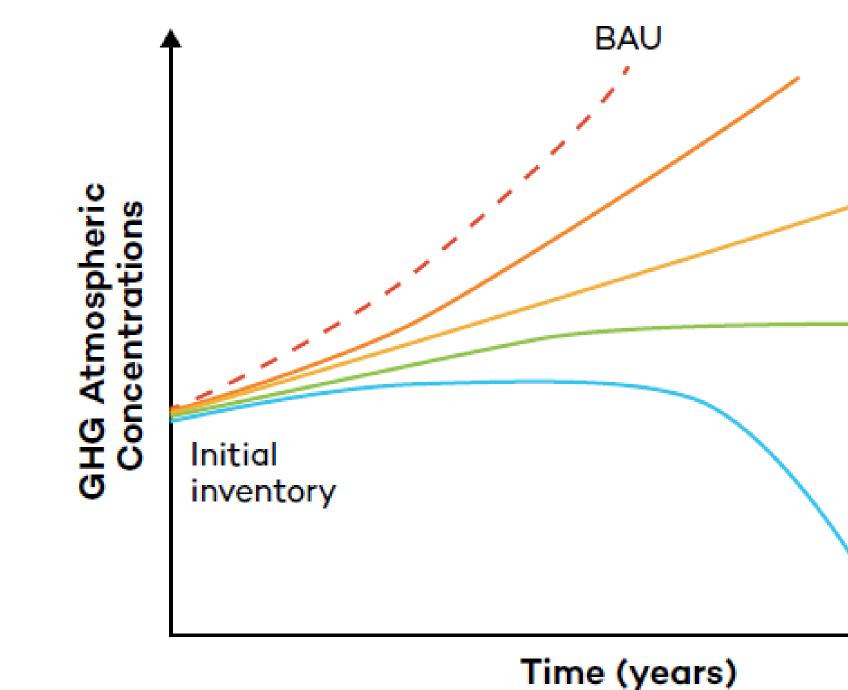
#### Figure 2. A representation of emission processes by Scope 1, 2 and 3



Source: GHG Protocol, 2019.



### Figure 9. The expected trajectory of emissions for Scenario 4: Net removals



Source: Authors' elaboration.

Scenario 1: Increasing emissions

Scenario 2: Constant emissions

Scenario 3: Decreasing emissions

Scenario 4: Net removals







### Dr Yogendra Chaudry

VP, Professional Services & ESG SSCI/ ECO Canada

### Erika Luna

Policy Analyst International Institute for Sustainable Development

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## PANEL | THE STATE OF SUSTAINABILITY – EFFORTS IMPACTING GLOBAL **PRODUCE SUPPLY CHAINS**



## Richard Schouten

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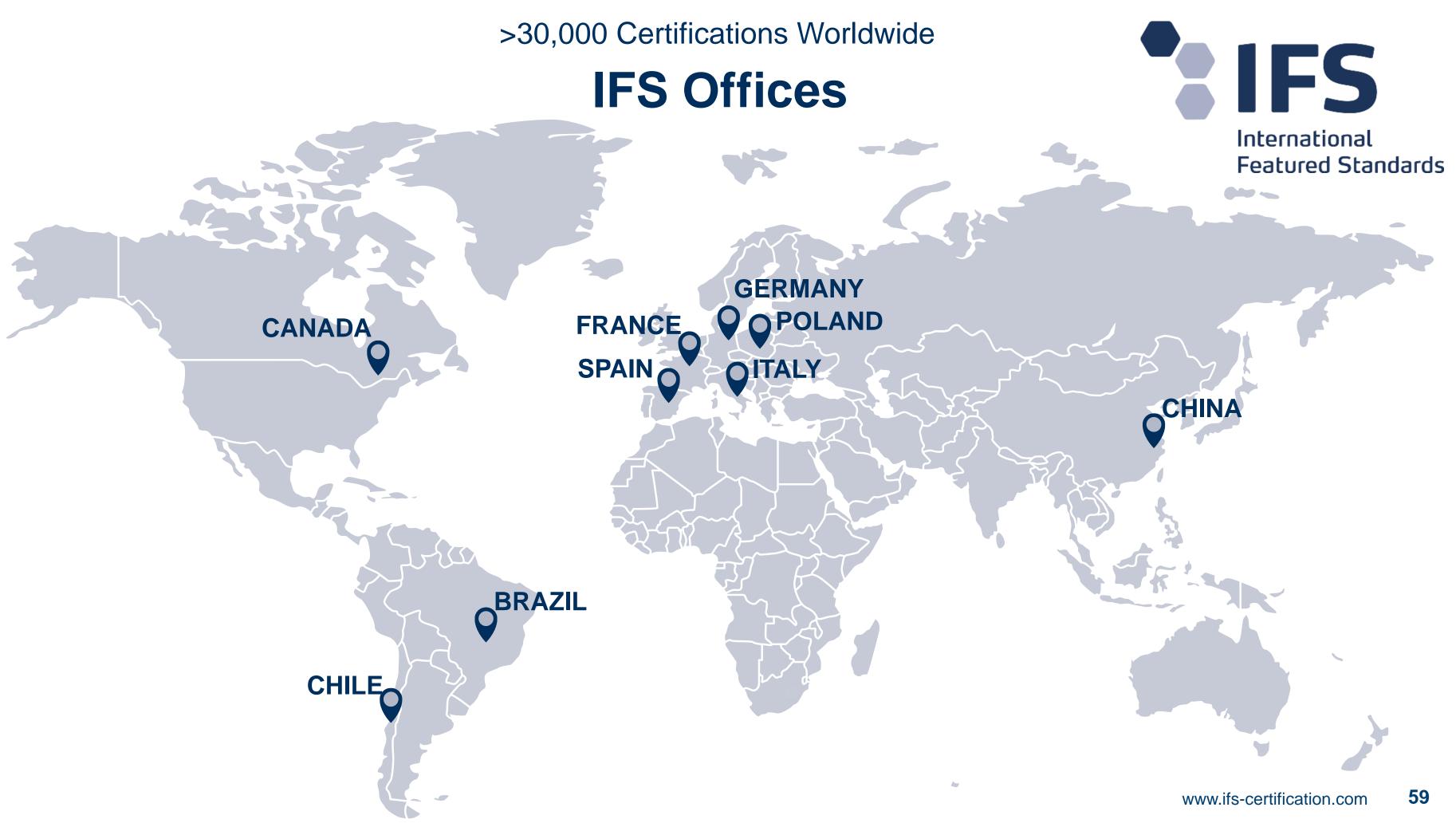
## International Featured Standards

## INTERNATIONAL FEATURED STANDARDS

## CPMA/ACDFL INTERNATIONAL SUSTAINABILITY SUMMIT APRIL 26, 2024







## **IFS Family of Standards**











## **IFS Packaging Standard**



Claims must be supported with evidence!



## IFS PACsecure is a global food safety and quality standard

**62** www.ifs-certification.com

## Any questions?

Contact me any time!

Cheryl Sullivan



## sullivan@ifs-certification.com

## NETWORKING BREAK

International Sustainability Summit Friday April 26 2024 | Vancouver

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Agriculture and Agri-Food Canada





International Featured Standards

# Sinclair

## FIRESIDE CHAT | DECODING ENVIRONMENTAL, SOCIAL AND GOVERNANCE (ESG) REPORTING & **INVESTING TRENDS** International Sustainability Summit Friday April 26 2024 | Vancouver





**Graeme Blair** Director, Sustainable Finance Royal Bank of Canada

## FIRESIDE CHAT | DECODING ENVIRONMENTAL, SOCIAL AND **GOVERNANCE (ESG) REPORTING & INVESTING TRENDS**

#### **Jonathan Belair** Managing Partner Power Sustainable Lios

ALIGNING GLOBAL PRODUCE SUPPLY CHAIN SUSTAINABILITY PRACTICES WITH UNSDGS - LESSONS TO DATE International Sustainability Summit Friday April 26 2024 | Vancouver





### **Jacob Lawes**

Project Manager United Fresh New Zealand

## ALIGNING GLOBAL PRODUCE SUPPLY CHAIN SUSTAINABILITY **PRACTICES WITH UNSDGs – LESSONS TO DATE**











# Aligning Global Produce Supply Chain Sustainability Practices with UNSDGS

Lessons to date

26 April 2024

Jacob Lawes & Dr Hans Maurer

## Introducing United Fresh

### Vision

Creating a sustainable fresh fruit and vegetable industry for New Zealand.

### Mission

Connecting the fresh fruit and vegetable value chain by providing services and representation to industry.



## **United Fresh**



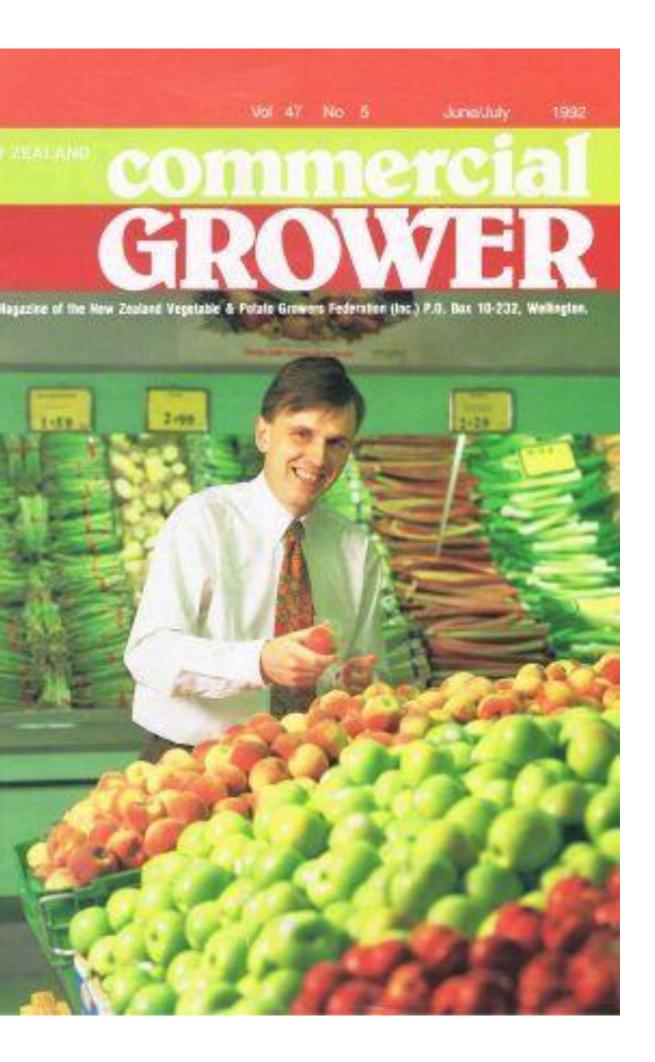
### www.unitedfresh.co.nz

#### The Organisation

- Only pan-produce industry organisation in New Zealand.
- Represent the produce value chain since 1991.
- ~95 members, across the entire supply chain.
- Incorporated Society: Elected Executive Committee provides Governance, United Fresh staff manage work to the direction of Executive.
- Work completed must follow requirements of Incorporated Societies Act.
- Cannot just chose to "do" sustainability & SDGs, need member acceptance.
- Cannot force members to implement United Fresh work.

## Dr Hans Maurer

- Founder and Director, The AgriChain Centre Ltd. <u>www.agrichain-centre.com</u>
- Executive Committee Member & Chair Technical Advisory Group, United Fresh Inc. www.unitedfresh.co.nz
- Chair, Information Management & Standardization Committee, International Federation for Produce Standards (IFPS). <u>www.ifpsglobal.com</u>
- Retailer in my misspent youth!



# Jacob Lawes Master of Sustainable Development Goals

- Projects Manager, The AgriChain Centre Ltd. <u>www.agrichain-centre.com</u>
- Technical Advisory Group Projects Manager & Sustainability Representative, United Fresh Inc. <u>www.unitedfresh.co.nz</u>
- New Zealand Representative, Sustainability Committee, International Federation for Produce Standards (IFPS). www.ifpsglobal.com
- Recently completed Masters (2023) focused on fresh produce governance, based on the SDGs.

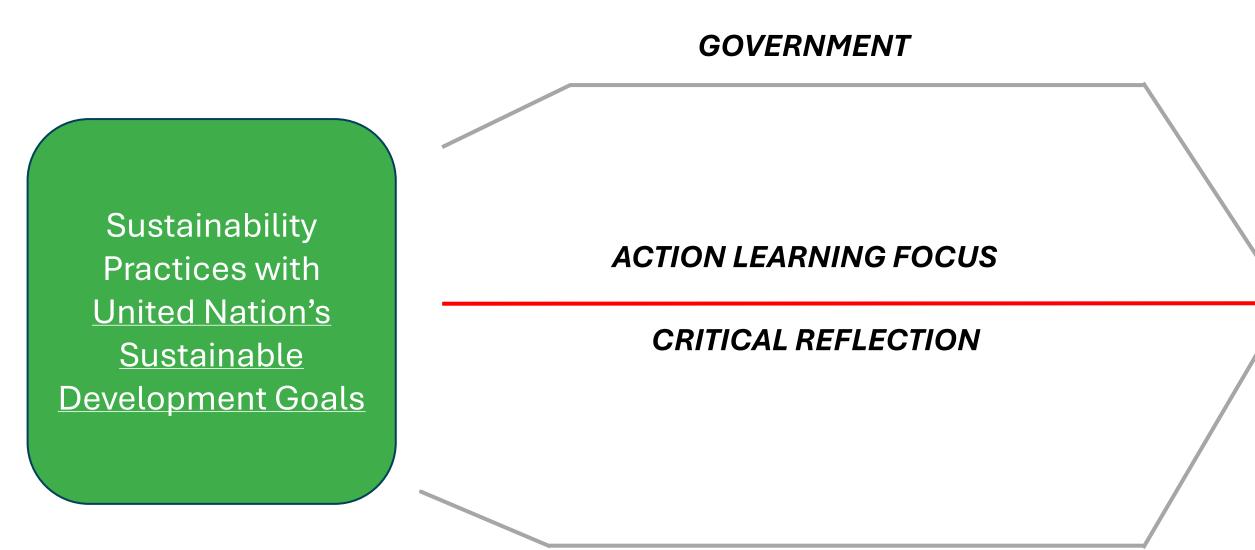


# Not Australia!

If anything.....



# Visual outline of the next 50 minutes



#### FRESH PRODUCE INDUSTRY



Produce industry specific OPPORTUNITIES guidelines

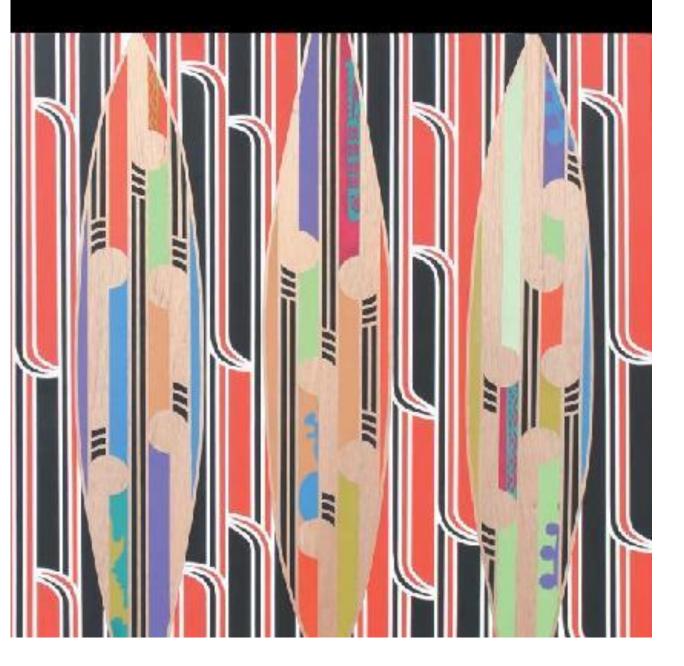
# NZ Government's Progress Towards The SDGs - 2019

- New Zealand committed to supporting the SDGs in 2015.
- New Zealand recognises that all SDGs are connected and cannot be achieved by governments alone.
- NZ's natural capital is woven into the fabric of every New Zealander's health and wellbeing, the country's brand and Te Ao Māori.
- NZ wants to build a solid and enduring foundation to achieve a more productive, sustainable and inclusive society.



#### HE WAKA EKE NOA Towards a better future, together

NEW ZEALAND'S PROGRESS TOWARDS THE SDGs - 2019



## Government Indicators Actearoa New Zealand - 2019



# The COVID Pause



Source: Rafia Rasool, Kashmir

# The Auditor General's Progress Review - 2021

#### Recommendations

- When the Government signs up to international agreements, it should clearly communicate what these commitments mean.
- The Government still needs to clarify: whether it will set targets for each SDG; what specific actions it will take; and how it will measure progress.
- The Government also needs to consider how it will work with Māori to ensure that plans to achieve the sustainable development goals uphold and reflect te Tiriti o Waitangi.
- Engagement with stakeholders and the public is needed to increase awareness of New Zealand's commitment to the goals and to encourage participation across all sectors.

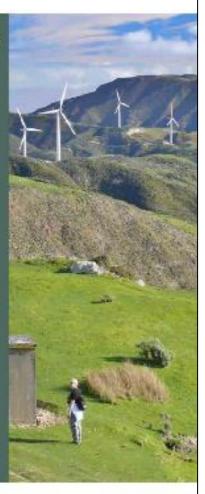


CONTROLLER .... AUDITOR-GENERAL

Turioaki e te Mana Aretake

8.29[21g]

The Government's preparedness to implement the sustainable development goals



# **Global Engagement**

The aim of the Summit was to raise awareness of the critical role that agricultural and food systems play in achieving a sustainable future.



# UNITED NATIONS FOOD SYSTEMS SUMMIT 2021

# Global Engagement

# Local Action

### **Food Systems** Summit Dialogue

Jerry Prendergast, Curator **President United Fresh** Auckland, 20th April 2021

The Future for Fruit & **Vegetable Kai Systems in Aotearoa New Zealand** 



Convened by: Dr Hans Maurer, United Fresh Dr Nick Roskruge, Tahuri Whenua





Tahuri Whenua National Mäori Vegetable Growers Collective

> #SummitDialogues @foodsystems

### https://summitdialogues.org/dialogue/6597/

International Industry Engagement

The Fresh Produce Industry Contribution

www.ifpsglobal.com





### Aotearoa New Zealand Industry/Government SDG Issues

#### The Issues

**Issue 1**: Governments committed to SDGs but vague in engaging with industry on realistic potential achievements!

**Issue 2:** Industry not always sure of how to work towards the SDGs and their targets.

**Issue 3:** Industry not certain all Goals apply to them (e.g., SDG 4).

**Issue 4:** Industry specific information on SDGs lacking. SDGs' major focus is Governments & developing nations.

### Guy in the Middle: 5<sup>th</sup> Prime Minister since 2015



https://tuesdayclub.nz/the-new-government-is-heading-nz-down-a-scary-road/

# Our New Zealand Challenge

How can United Fresh help the fresh produce industry understand & enable it to work towards SDGs, and avoid the siloed thinking our farming industry appears to be afflicted by?

### **Siloed thinking – holding NZ & the world back**



**Illustration by Chris Slane** 

https://www.farmersweekly.co.nz/opinion/siloed-thinking-is-holding-nz-back/. September 2022

United Fresh Conclusion & Realisations -November 2022

#### Conclusion

• Our industry needs to take responsibility and become accountable for developing industry specific sustainability focused solutions, ideally in line with SDGs.

#### Realisations

- Implementing this Conclusion is preferable to having to deal with government-imposed solutions that may end up sub-optimal for our industry.
- We are lacking a framework and a "how-to" process that allows our industry to effectively implement Sustainable Development Goal **Targets** based on industry-relevant **Indicators**.

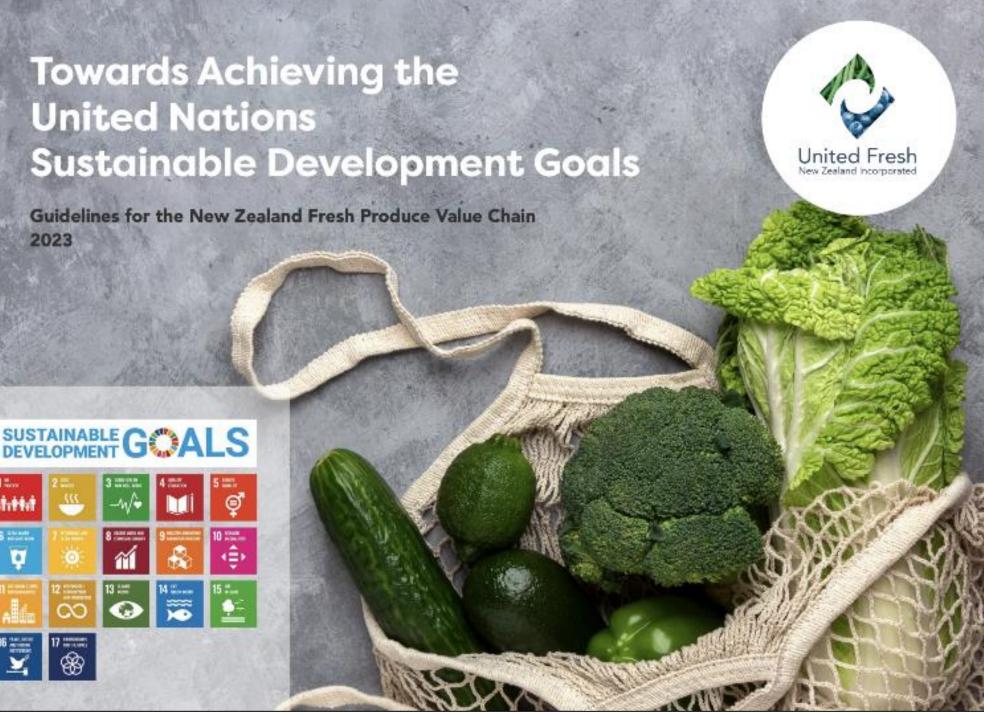


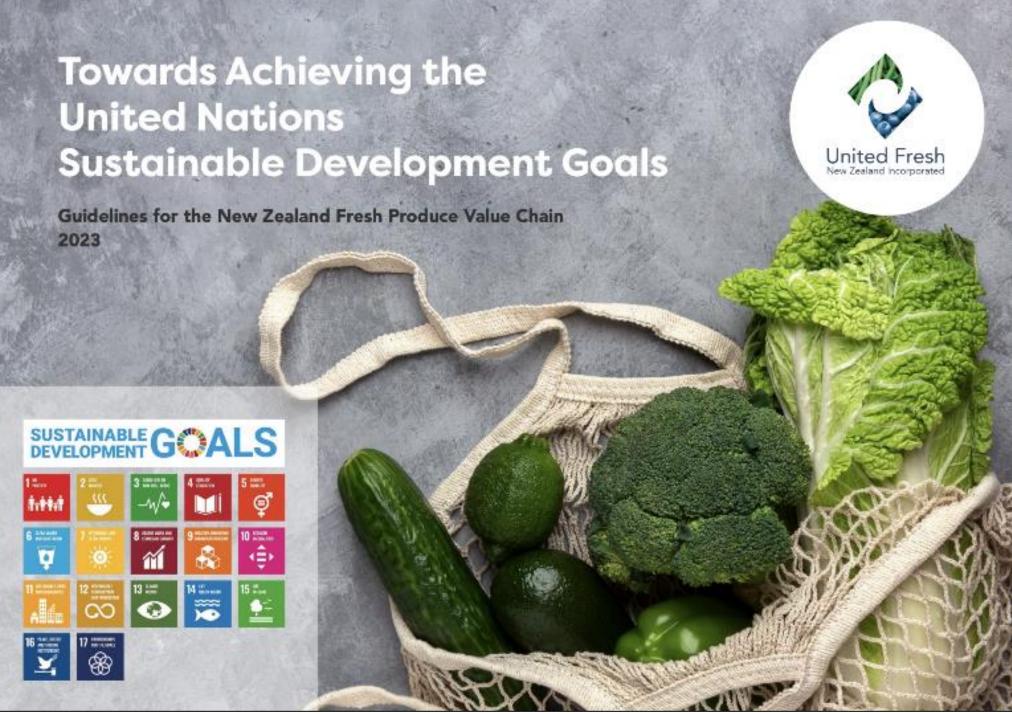


#### Hall of Mental Cultivation (Yangxin dian)

The Outcome of Our **Deliberations – June** 2023

### **An Industry Guideline!**





https://unitedfresh.co.nz/assets/site/23052\_UF\_Guidelines-\_NZ-Fresh-Produce-Value-Chain\_v4F1.pdf

# Sustainable Development Goals Structure

- Each **Goal** has a particular focus area.
- Goals achieved by reaching associated Targets.
- **Targets** tracked by measuring **Indicators** with data.



# 17 Goals,169 Targets,231 Unique Indicators

### Example:

- Common descriptor of SDG 9: "Industry, Innovation, and Infrastructure".
- Formal wording of SDG 9: "Build resilient infrastructure, promote inclusive and sustainable industrialization, and foster innovation".
- SDG 9 has 8 Targets, with associated Indicators.
- **Target 9.4**: "By 2030, upgrade infrastructure and retrofit industries to make them sustainable, with increased resource-use efficiency and greater adoption of clean and environmentally sound technologies and industrial processes...".
- Indicator 9.4.1: "CO<sub>2</sub> emission per unit of value added".



### **Government** Indicators Aotearoa New Zealand - 2019



# **Government** Indicators Aotearoa New Zealand – SDG 1& 9







Infrastructure Resilience of infrastructure Modified land Commuting time to work Costs of extreme weather events Gross greenhouse gas emissions 🛛 🗨 Material intensity, including recycling, landfill inflows, second-hand economy 

Net fixed assets

# Government Indicators Aotearoa New Zealand - 2019 & Fresh Produce Value Chain SDG Opportunities – 2023



SDG	Produce Value Chain SDG Opportunities
1 POVERTY	- Pay the living wage as a minimum along the entire value chain.
<b>∄</b> ∗##÷₿	<ul> <li>Increase the attractiveness of fresh produce value chain employment of</li> </ul>
	- Increase employment opportunities for people with physical or menta

ne		
vents		

t opportunities for both permanent and seasonal staff. tal disabilities, as well as for senior citizens.

# Government Indicators Aotearoa New Zealand - 2019 Å **Fresh Produce Value Chain SDG Opportunities** – 2023



Infrastructure Resilience of infrastructure Modified land Commuting time to work Costs of extreme weather events Gross greenhouse gas emissions 🛛 📥 Material intensity, including recycling, landfill inflows, second-hand economy 

Net fixed assets

#### SDG

#### **Produce Value Chain SDG Opportunities**



- Accelerate the pace of industry relevant science/research/knowledge integration into produce industry processes and behaviours.
- Extend this approach to all aspects of the produce supply chain, including packhouse logistics and transport management.
- Develop resilient supply chain infrastructure that uses environmentally sustainable processes, in terms of building supplies, heating and cooling technology, Wi-Fi capability, transport network strengthening and data management and traceability.

# The SDG Opportunities in YOUR Organisation

#### Produce Industry Opportunities mapped against SDGs and Aotearoa New Zealand Indicators Worksheet

SDG	Produce Value Chain SDG Opportunities	What is My Organisation's Starting Point Towards Achieving the SDGs?	Who is responsible?	Starting when?
1 ₩ Â¥ĤĤİ	<ul> <li>Pay the living wage as a minimum along the entire value chain.</li> <li>Increase the attractiveness of fresh produce value chain employment opportunities for both permanent and seasonal staff.</li> <li>Increase employment opportunities for people with physical or mental disabilities, as well as for senior citizens.</li> </ul>			
2 //#0 #IAAGER	<ul> <li>Maintain and develop Aotearoa New Zealand's capacity and capability to grow all fruit and vegetable varieties that can be commercially produced in our climatic conditions, contributing to food security.</li> <li>Encourage increased fruit and vegetable consumption.</li> <li>Improve access to affordable fruit and vegetables for all.</li> </ul>			
3 GOOD HEATTH AND WILL-SENG 	<ul> <li>Consistent, accurate and science-based promotion of fruit and vegetables' health benefits.</li> <li>Investment into the role of fruit and vegetables as functional foods components.</li> <li>Workplace policies that encourage team health from both physical and mental perspectives.</li> <li>Ensure all team members have a safe working environment at all times.</li> </ul>			

# **Opportunities, rather than Targets**

- An Opportunity is not a Target.
- They serve different purposes.
- You build a Target **from** the Opportunity.
- Opportunities are **strategic** in nature, and involve blue-skying.
- Targets are **operational** in nature, and involve structured measuring, on the basis of indicators.



Food and Agriculture Organization of the United Nations





### FRUIT AND VEGETABLES Opportunities and challenges

for small-scale sustainable farming

# **But Measuring Matters**

- We cannot know if we have achieved a Goal without having Targets.
- We cannot check **Target** progress without **Indicator** data.
- Indicators rely on accurate data.



Source: The Daily Mail

# **United Fresh Solution -Fresh Facts**

### A Welcome Opportunity...

- New Zealand annual industry publication since 1999.  $\bullet$
- Publisher 1999-2022: Plant & Food Research, a State-Owned lacksquareEnterprise.
- Coverage: "Horticulture", incl. wine, nuts, fresh & processed  $\bullet$ fruit & vegetables, ornamentals, cut flowers, and the seed industry.
- Focus: Export revenue data & statistics.  $\bullet$
- 2022: Plant & Food Research no longer considers Fresh Facts  $\bullet$ core business.
- 2023: New publisher continues Fresh Facts and introduces  $\bullet$ several changes.
- Fresh Facts now covers Domestic and Export & no longer  $\bullet$ includes wine.



# Fresh Facts 2023 – **Product Data &** Graphics

# The Tactical Approach: **Business as usual**

#### **Sector Profile**

	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	2,756	2,792	2,813	2,843	2,804
Hectares	12,373	11,650	12,072	13,610	14,512
NZ Export Volume (000)					
(3.6kg trays sold)	148,843	145,223	158,077	175,033	158,726
OGR/per ha	\$96,033	\$107,142	\$123,041	\$124,479	\$100,345
Domestic Crop Value					
Export NZ Crop Value (fob)	\$2.106 billion	\$2.272 billion	\$2.599 billion	\$2.871 billion	\$2.608 billion

Source: Zespri Annual Reports

New Zealand Grown Kiwifruit Volume by Variety (3.6kg Trays, 000')



Source: Zespri Annual Report 2022/23.

- Zespri's 2022/23 financial results reflect a challenging period for the kiwifruit industry, with grower returns down on the back of fruit quality issues that have primarily been driven by the industry's severe labour shortage, along with cost increases and supply chain challenges.
- Zespri recorded total global fruit sales revenue of NZ\$3.92 billion in 2022/23, down 3 percent on the record result of 2021/22, with global sales volumes down from 201.5 million travs to 183.5 million trays.
- Zespri's Non-New Zealand Supply sales decreased to \$519 million, down from \$537 million last year. This reflects challenges experienced in Zespri's offshore growing regions, with their Italian growers in particular facing extreme heat and some of the worst quality costs they have experienced in recent years.

Source: Zespri 2022/23 Financial Results Media Release, 30 May 2023.

- New Zealand Kiwifruit Growers Inc. published a very informative free e-book about the New Zealand kiwifruit industry in 2021. Check it out at https://www.nzkgi.org.nz/wp-content/ uploads/2022/01/FINAL WholeBook Digital.pdf

#### **Kiwifruit**

Green	55.7
Organic Green	2.9
SunGold	93.6
Organic SunGold	2.8
Sweet Green	0.2
Ruby Red	0.1
Other	3.4



- Zespri has commenced a collaborative marketing programme with Māori Kiwifruit Growers Inc. (https://www.maorikiwifruitgrowers. com/), which will make Māori Kiwifruit Growers Inc. solely responsible for the Hawaiian market.
- Independent kiwifruit marketers can apply for a collaborative marketing arrangement, in order to export their fruit to Zespri markets, or to gain access to new export markets. During the 2022/23 season, Kiwifruit New Zealand Inc. (KNZ) received and approved a total of 24 Collaborative Marketing applications.
- Kiwifruit is imported into Australia under the Compliance-Based Intervention Scheme (CBIS). It is now the most valuable HEA product exported to Australia, increasing 20% to \$65.4 million and accounting for 16% by value in 2022.

#### Zespri New Zealand Grower Returns for 2022/23

Fruit Category	Per Tray 2021/22	Per Tray 2022/23	Per Hectare 2021/22	Per Hectare 2022/23
Zespri Green	\$6.35	\$5.78	\$75,494	\$57,636
Zespri Organic Green	\$9.74	\$8.68	\$67,752	\$60,912
Zespri SunGold Kiwifruit	\$11.51	\$9.97	\$176,026	\$137,524
Zespri Organic SunGold Kiwifruit	\$12.61	\$12.28	\$143,770	\$133,548
Zespri Sweet Green	\$7.82	\$6.87	\$54,609	\$41,761
Zespri RubyRed Kiwifruit	-	\$22.27	-	\$42,063

Source: Zespri 2022/23 Financial Results Media Release, 30 May 2023.

- Every 750ha of production equates to approximately 10 million trays of fruit.
- There were appr. 14,500 producing kiwifruit orchards in 2022, which suggests that the average kiwifruit orchard size was just over 5ha, with every orchard on average producing over 66,000 travs.
- Kiwifruit New Zealand Inc. is the independent professional regulator that grants an Export Authorisation to Zespri and considers collaborative kiwifruit marketing applications.
- Collaborative Marketing efforts resulted in 2.8 million trays of kiwifruit being exported, representing \$27.8 million in market returns.

Sources: Zespri Annual Report 2022/23. Kiwifruit New Zealand 2023 Annual Report. Horticulture Export Authority, Kiwifruit Trade Website, accessed 11 July 2023.

#### **Industry Plans and Guidelines**



https://www.hortnz.co.nz/about-us/aotearoa-horticulture-action-plan/

- In February 2023, Horticulture New Zealand launched the Aotearoa Horticulture Action Plan - Strategy. One of the critical outcome areas is to grow sustainably.
- The scope of the Action Plan is 'food for people' (fresh & processed). It excludes forestry, wine, floriculture, and 'arable for livestock feed' sectors.
- The Plan's target is "increasing grower returns, and achieving \$12 billion in annual revenue by 2035".

Source: Aotearoa Horticulture Action Plan - Strategy. Growing Together 2035 (Feb 2023).

- In June 2023, United Fresh released its Sustainable Development Goals (SDGs) Guidelines. These Guidelines provide an industry framework, based on the UN SDGs and the Government's SDGs Indicators Aotearoa NZ model, and will have a significant impact on assisting industry to achieve the Sustainability Outcome Área of the 2035 Action Plan Strategy.



https://unitedfresh.co.nz/technical-advisory-group/united-nations-sustainabledevelopment-goals

FRESH FACTS 2023 33

# **The Strategic Approach**

### Fresh Facts 2023 – Aligning and Measuring SDG Progress



Aspects of the Action Plan strategy align with 10 of the 17 United Nations Sustainable Development Goals.



End hunder, achieve food security and improved nutrition and promote sustainable agriculture.

> **9** AND REPARTING



Build resilient infrastructure, promote settlements inclusive. inclusive and sustainable safe, resilient and industrialisation and foster innovation.



Actesroa Horticulture Action Plan - Strategy • Growing Together 2035 23

# Further Example

# **The United Fresh NZ Board Report**





#### **OUR STORY**

A sustainable fresh fruit and vegetable industry that is united and connected with all sectors within the industry value chain, is informed about issues that matter to their business and is healthy and prosperous, enabling it to contribute to achieving New Zealand's economic success.



#### ADOPTING THE UNITED NATIONS SUSTAINABLE **DEVELOPMENT GOALS**

United Fresh has adopted the United Nations Sustainable Development Goals, with specific focus on Good Health and Well-Being, Gender Equality, Responsible Consumption and Production and Partnerships for the Goals. Our current and future projects will link with these goals whenever possible.





# SDGs through the lens of **ESG / "The Three P's"** Working with what you already do…



# Governance & Sustainability Sustainability in the Short-Term/Here & Now

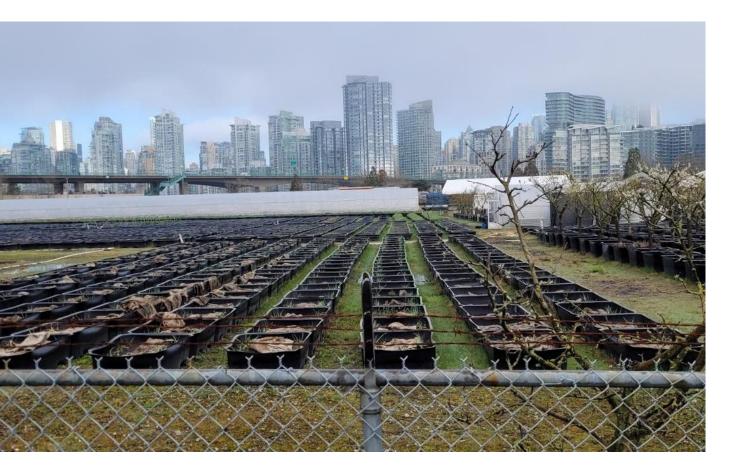
- Covers many activities related to Profit Accounting, HR, Compliance, Risk, Strategy, etc.
- Bundles what exists across the business: GAP, BRC, ISO, GS1, legal requirements, etc.
- Data generated for: Board Reports, Annual Reports, Audits, Tax Records, etc.
- Mix of top-down, and externally-driven.
- Governance is a **value-maintenance** tool. It keeps businesses running.



# Social Sustainability Sustainability in the Medium-Term/Next 5 Years

- At its core, it's about attracting and keeping **People**.
- Focal points include staff safety, education & productivity.
- Acts as a value-add to business.
- Contributes to staff retention, engagement, and willing applicants.
- Internally driven.
- Best driven from **bottom-up**.





# Environment & Sustainability Sustainability in the Long-term/10 Years Plus

- The traditional concept of "sustainability" – Protecting the Planet.
- Cannot grow, pack, or sell fruit & vegetables in environments unable to support growing conditions.
- Environmental sustainability is a value protector.
- Currently typically externally driven, but this has risks.
- Businesses know their environment best – and can identify the opportunities relevant to them.



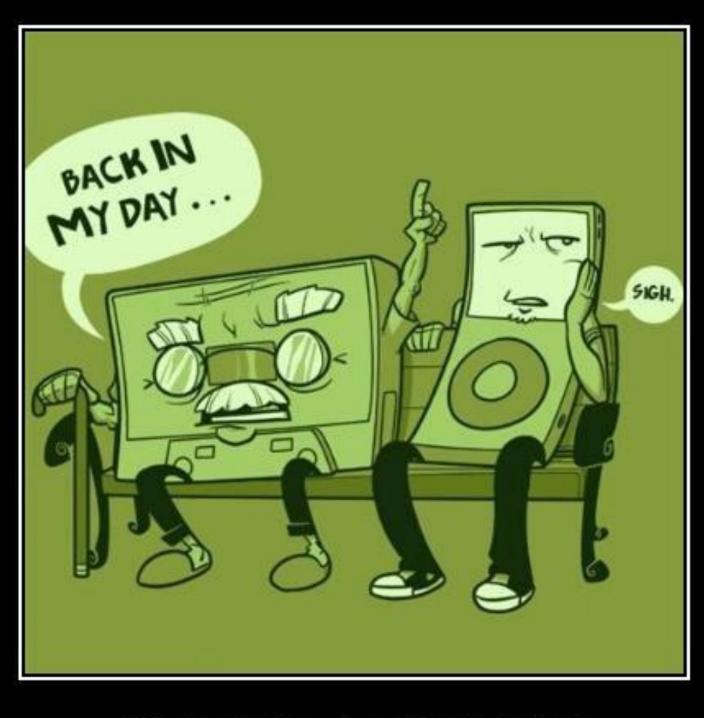
# ESG – Sustainability pulled together It is time to step back and see the big picture...

- ESG are the three branches of sustainability, and cover different scopes.
- Many SDGs cover 2 or 3 of the ESG categories not a coincidence or accident.
- Success involves adopting all three branches of ESG.
- Identify and develop your opportunities first, to gain the most benefit.



# Learnings Summarised

# Our Approach for the Balance of the Presentation



(

VERY DEMOTIVATIONAL .com

# GENERATIONAL DIFFERENCES

From Four-Track to Four-Gig

# Summarised Learnings Hans' Perspective

- The UN SDGs are expressed in exquisitely simple language, making them applicable to all processes, be they governmental, commercial, or not-for-profit.
- One assumes that "exquisitely simple language" translates into equally as simple implementation at **one's** peril.
- The Goals are there to be reached, and not implemented.
- What is implemented are sustainability processes.
- In all likelihood, most businesses, particularly most produce businesses, already have processes in place that relate to the sustainability concept, but in many instances we don't know or do not recognise these processes.



# Example: Not Initially Recognised!



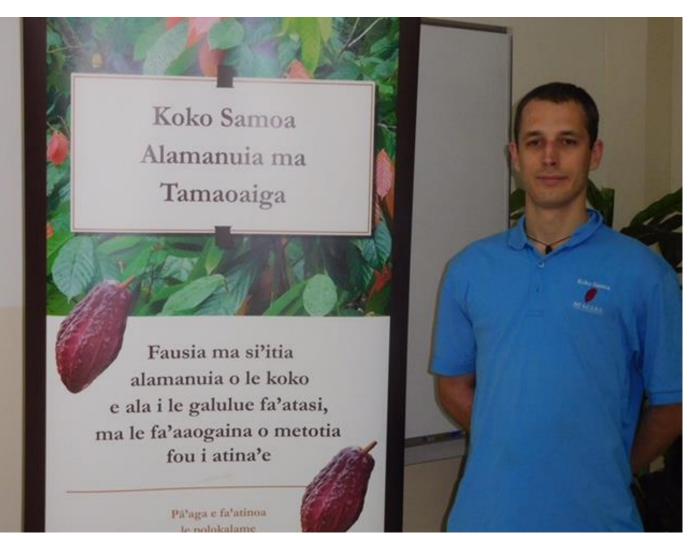
### Solid RPC

Collapsible RPC





# Summarised Learnings – Jacob's Perspective



- SDGs are expressed in gracefully simple language, and are applicable to all, be they governmental, commercial, or not-for-profit.
- "gracefully simple language" enables easy adoption of the SDG **framework** (Goals, targets, and indicators).
- The SDG framework is not for implementing sustainability, but to monitor progress of your sustainability practices.
- The framework must be adopted in full no rejecting / ignoring individual Goals.
- Official SDG targets and indicators are not the only ones they represent globally relevant measurements.

# Sustainability is a Balancing Act



 Creating relevant targets and indicators is valid, so long as they progress the SDG concepts.

• What currently can't be measured can still advance your sustainability journey.

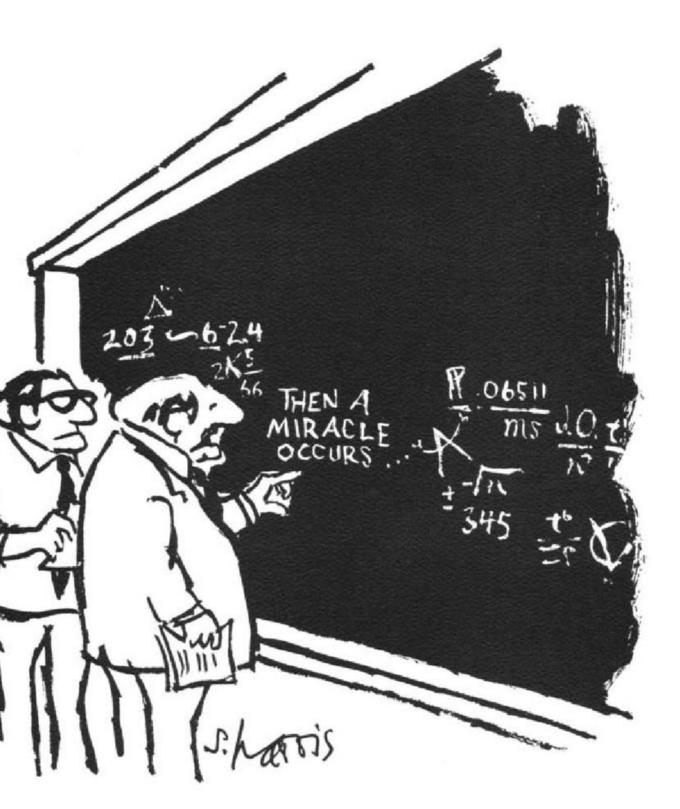
• Aligning sustainability practices with SDGs requires considering appropriate measurable targets and indicators, whether the UN's or yours.

• Relevant, robust indicators & targets are best achieved through combining industry expertise, SDG related knowledge, and common sense.

 Sustainability practices can be enhanced by injecting SDG specific courses of study during design - whether practical or academic.

#### Summarised Learnings – Combined

- Sustainability is more than just what is labelled sustainability, but also that which may not seem so at first.
- A robust framework enables, but does not equal, robust processes.
- Weak frameworks & processes do not lend themselves to develop sustainability consciousness, nor meaningful journeys towards achieving the SDGs.
- You cannot prioritise the SDGs, only identify immediate and long-term sustainability opportunities that you can progress.
- The SDGs are a global benchmark, relevant to all. Industry will benefit significantly from understanding and using this benchmark system.



"I THINK YOU SHOULD BE MORE EXPLICIT HERE IN STEP TWO,"

Source: Sydney Harris

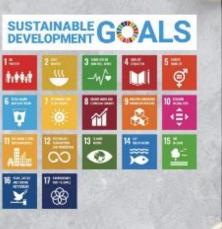
#### Summarised Learnings – Combined

- Success as a sector will require us to include, and work with, the not-for-profit and social/indigenous producers.
- We must question if the current system is contributing to the problem, or the current system can be adjusted to fix the problem.
- Correct **wording**, and **perspectives**, can be the difference between success and failure.
- Developing an SDG guide/guidelines is the beginning of a process, not the end of your journey.
- Utilising every communication tool available to report on the SDG alignment measures is a must.

#### Towards Achieving the United Nations Sustainable Development Goals

United Fresh

Guidelines for the New Zealand Fresh Produce Value Chain 2023



### Summarised Learnings – In short

- Governments are good at conjuring up scenarios, but less apt at designing road maps that work.
- No one part of the fresh produce supply chain is equipped to be the exclusive architect of the entire chain's SDG response.
- We need to move our industry out of first gear in all things sustainability.
- 17 Goals, 169 Targets, 231 Unique Indicators... Do not forget to read the "small print"!
- Treat the produce industry SDG response as an intergenerational engagement process. Easier said than done at times, but worth it!



# **Thank You**



#### tag@unitedfresh.co.nz



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# LUNCH BREAK

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https://www.youtube.com/watch?v=lyGsxVAfvuU

### PLENARY SESSION | SUSTAINABILITY IN ACTION – PRODUCE SECTOR LEADERS TAKING A SYSTEMS-CENTRIC APPROACH TO SUSTAINABILITY International Sustainability Summit Friday April 26 2024 | Vancouver







#### **Tom Pierce**

National Director of Produce Sourcing & Supplier Development Sobeys

#### Matt Aronson Chief Revenue Officer Verdant Technologies

John Mesko CEO **Potato Sustainability** Alliance

#### PLENARY SESSION | SUSTAINABILITY IN ACTION - PRODUCE SECTOR LEADERS TAKING A SYSTEMS-CENTRIC APPROACH TO SUSTAINABILITY





#### Gerd Uitdewillingen **Director International Sales**

**COPELAND** 

#### **Devon Kennedy**

National Marketing Manager **Highline Mushrooms** (moderator)

#### **OVERVIEW OF THE BREAKOUT SESSION** FORMAT, GOALS & OUTCOMES International Sustainability Summit Friday April 26 2024 | Vancouver

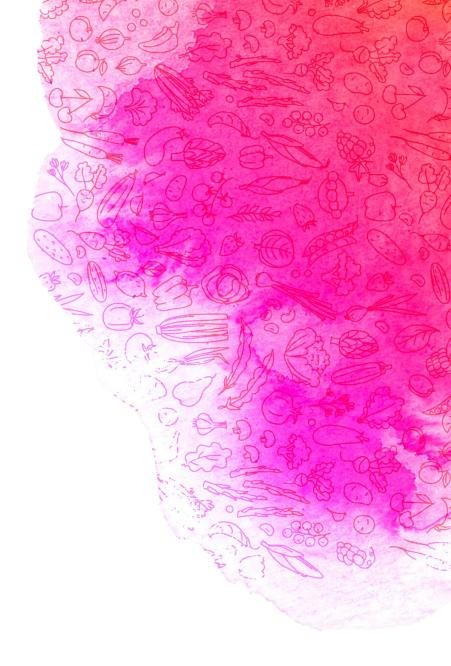
## Today's Summit Goals...

### • Learn

### Share & Challenge

 Shape action towards harmonized sustainability practices





### Today's Summit Goals...

- Breakout Session: Help shape a Draft Fresh **Produce Sustainability Charter**
- Why develop a Fresh Produce Sustainability **Charter?** 
  - To promote the importance of sustainability To advocate for support of sustainability efforts To accelerate adoption of sustainability actions To achieve the desired <u>and</u> required state of sustainability

### **Breakout Session Overview**

- Breakouts at your individual tables  $\bullet$
- Designate a table rapporteur  $\bullet$
- Review 3 sustainability themes
  - 40 minutes per theme
  - Environment
  - Social

Governance

Explore, discuss & challenge!





- **Principles** to guide the industry towards harmonized practices
- Ongoing Activities to take into account (e.g, practices, frameworks, schemes, standards, etc.)
- Leading Risks to achieve harmonization
- Priority actions towards harmonization



### **Breakout Session Overview**

To help shape the Draft Fresh Produce Sustainability Charter, we are seeking your input today on...

- Principles to guide the industry towards harmonized practices; e.g.,
  - "care for health of soil" (enviro)
  - "promotion of decent work" (social)
    - "promoting effective management systems" (governance)



- **Ongoing Activities** to take into account (e.g, lacksquarepractices, frameworks, schemes, standards, etc.); e.g.,
  - National Index on Agri-Food Performance (enviro)
  - Ethical Charter on Responsible Labour Practices (social)  $\bullet$
  - CGF's Sustainable Supply Chain Initiative (governance)



- Leading Risks to achieve harmonization; e.g.,
  - Lack of plastics regulatory alignment (enviro)
  - Gender disparity (social)

Complexity of ESG reporting requirements (governance)

Priority actions towards harmonization

 What do you recommend as the priority focus actions towards harmonization?

**Other key considerations** Xe

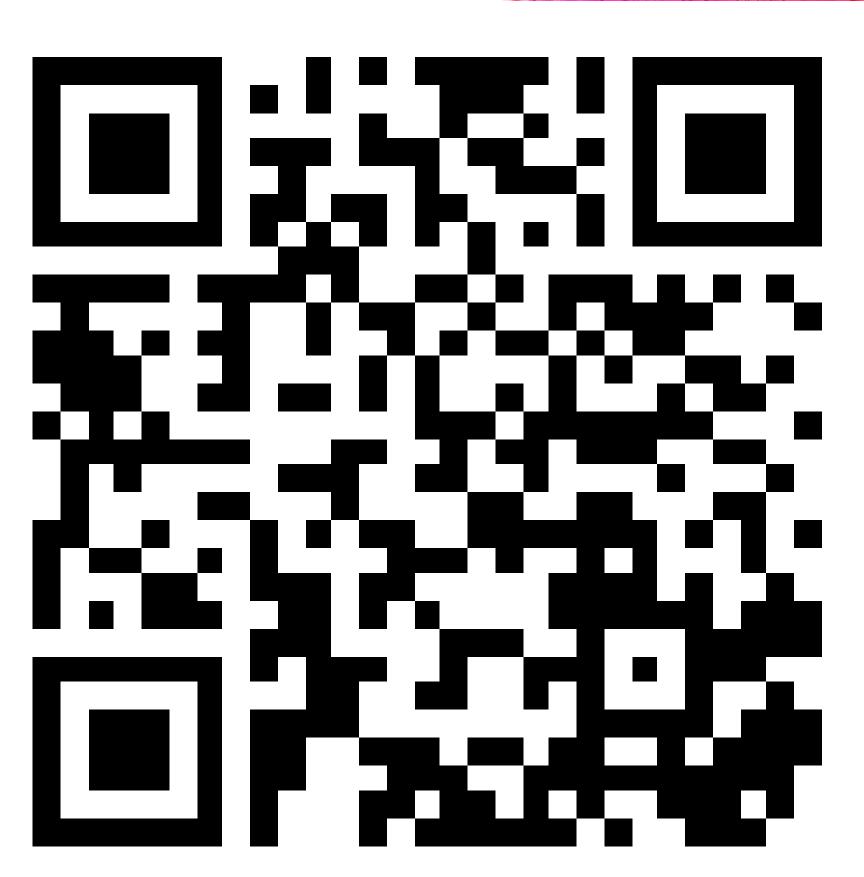


### **Breakout Session Overview**

### Collecting your input using Slido.com

### 1. Go to Slido.com

### 2. Enter code: 1441246



### **Breakout Session Overview**

### Collecting your input using Slido.com

### 1. Go to Slido.com

**2. Enter code: 1441246** 

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	8
⊂ Q&A II Polls	A Com
Survey 2	වු: ව
What are the Environment- related Principles to guide the industry towards harmonized practices?	
Type your answer	
Ongoing Environment-related Activities to take into account (e.g, practices, frameworks, schemes, standards, etc.)	2/4
Type your answer	

### BREAKOUT SESSIONS | TAKING ACTION TOWARDS HARMONIZED SUSTAINABILITY PRACTICES FOR THE GLOBAL PRODUCE

# **SUPPLY CHAIN** International Sustainability Summit Friday April 26 2024 | Vancouver

FRAMING QUESTIONS: To help shape the Draft Fresh Produce Sustainability Charter, we are seeking your input today on...

- **Environment-related Principles** to guide the industry towards harmonized practices
- **Ongoing Environment-related** Activities to take into account (e.g. practices, frameworks, schemes, standards, etc.)
- Leading **Environment-related Risks** to achieve harmonization
- Priority Environment-related Actions towards harmonization

### THEME 1 | ENVIRONMENT

- Clean Water
- Affordable Energy  $\bullet$
- Industry
- Innovation and Infrastructure
- Sustainable Cities and Communities  $\bullet$
- Production
- Climate Action lacksquare
- Life below Water

Applicable UNSDGs (8):

**Responsible Consumption and** 

Life on Land

**To Submit your Table's Input** Go to Slido.com Enter code: 1441246

FRAMING QUESTIONS: To help shape the Draft Fresh Produce Sustainability Charter, we are seeking your input today on...

- **Social-related Principles** to guide the industry towards harmonized practices
- **Ongoing Social-related Activities** to take into account (e.g, practices, frameworks, schemes, standards, etc.)
- Leading **Social-related Risks** to achieve harmonization
- Priority **Social-related Actions** towards harmonization

### THEME 2 | SOCIAL

- No Poverty
- Zero Hunger
- Good Health and Well-Being
- **Quality Education**
- Gender Equality  $\bullet$
- Clean Water and Sanitation
- Decent Work and Economic Growth Industry
- ullet
- Innovation & Infrastructure
- Reduced Inequalities  $\bullet$
- Responsible Consumption and  $\bullet$ Production
- Peace, Justice and Strong  $\bullet$ Institutions

Applicable UNSDGs (11):

**To Submit your Table's Input** Go to Slido.com 2. Enter code: 1441246

FRAMING QUESTIONS: To help shape the Draft Fresh Produce Sustainability Charter, we are seeking your input today on...

- Governance-related Principles to guide the industry towards harmonized practices
- **Ongoing Governance-related** Activities to take into account (e.g. practices, frameworks, schemes, standards, etc.)
- Leading Governance-related Risks to achieve harmonization
- Priority Governance-related Actions towards harmonization

### **THEME 3 | GOVERNANCE**

- Gender Equality
- Decent Work and Economic Growth Industry  $\bullet$
- Innovation and Infrastructure
- Sustainable Cities and Communities
  - $\bullet$ Production
- **Climate Action** ullet
- Institutions
- Partnerships for the Goals ullet

Applicable UNSDGs (8):

- **Responsible Consumption and**
- Peace, Justice and Strong

**To Submit your Table's Input** Go to Slido.com Enter code: 1441246

# NETWORKING BREAK

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### **BREAKOUT SESSIONS REPORTS**

**OUI SESSIONS REPORTS** International Sustainability Summit Friday April 26 2024 | Vancouver

### **THEME 1 | ENVIRONMENT - Principles**

Environmental Performance Sustainability Principle Nutritional **Ecological Integrity Environmental Impact** Rockstrom **Environmental Impacts** Biodiversity Sustainable Development Environmental Laws Minimised Sustainability Lca Polluter Pays Principle

Pollution Prevention Environmental Matters

#### **THEME 1 | ENVIRONMENT - Activities**

Sustainable Agriculture Fsc Organic Emissions Trading Schemes Renewable Energy Adoption Globalgap **Establish Metrics** Sustainability **Environmental Performance** Iso Carbon Pricing Certicatin **Carbon Pricing Mechanisms** Exented Carbon Emissions Carbon Economy Environmental Impacts **Green Building Standards** 

- Fsc Gap
- Sustainability Efforts

#### **THEME 1 | ENVIRONMENT - Risks**

Harmonized Regulations **Climate Change Pollution** Environmental Risks Time Harmonization Biodiversity Climate Impacts Ecosystems Semi Arid Ecosystem Services Biodiversity Loss **Pollution Risks** Climate Regulation Expectations Environmental Practices Ecosystem Stability

- Mindset Conflict
- **Conservation Efforts**

#### **THEME 1 | ENVIRONMENT - Actions**

#### Enforcement And Compliance Sustainability Green Infrastructure **Environmental Policies** Foster Stakeholders sdg

**Data Standardization** Sustainable Practices Harmonize

Sustainable Development Education **Environmental Management** 

Environmental Challenges Cpma **Environmental Performance** Partnership Development

- Establish

#### THEME 2 | SOCIAL - Principles

Social Certifications Human Labor Labor Standards Human Resources Food Security <sup>Certs</sup> Sustainability Stakeholder Dialogue Foster Wellness Sustainable Living Fair Wages **Community Food Banks** Stakeholders Education Viable Employment Labour Fairness Equity Supply Chain Fairness Adopting Sdgs Narrow Wage Gap Employment Opportunities



#### **THEME 2 | SOCIAL - Activities**

Fair Labor Practices Gri Standards **Regulatory Frameworks** Healthcare Regulatory Checks Standards Regulation Specific Regulations Fairtrade Fair Trade Certification Smeta CSr Dei Accountability Social Impacts **Guidelines** Enforcement Human Rights Principles

- **Ethical Sourcing**



### THEME 2 | SOCIAL - Risks

Affected Communities Social Sustainability Inability Data Privacy Farm Land Discrimination Social Inequality Democratic Social Risks Human Rights Labor Rights Violations ahts Violations Social Injustice Human Rights Violations Human Rights Abuses Labor Abuses Sustainability Social Unrest Social Responsibility Digital Rights **Economic Empowerment** 

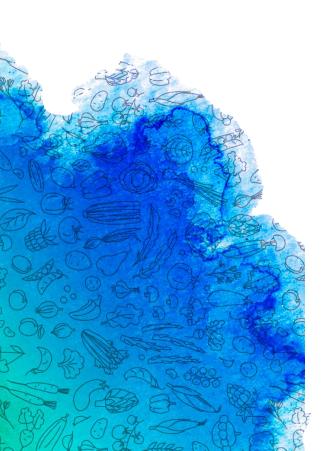


#### THEME 2 | SOCIAL - Actions

**Relevant Stakeholders Discrimination Fpic Fair Trade Practices** Labor Standards Accountability Foster Appropriate Hr Policies Stakeholders Foster Human Rights Healthcare Social Equality Stakeholder Engagement Farmers Social Responsibility Ethical Sourcing Dei Human Rights Due Diligence Future Ag Workers Labor Practices Labor Standards Compliance

### **THEME 3 | GOVERNANCE - Principles**

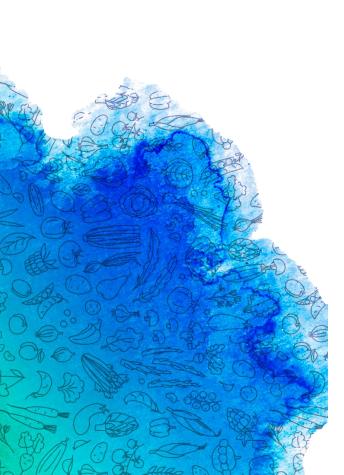
**Continuous Improvement Regulatory Compliance** Cooperatives Partners Regulations Stakeholders **Food Security** Accountability Integrity Uphold Integrity **Ethical Principles Foster** Workplace Policies Compliance Stakeholder Engagement Responsibility Accountability Regulatory Public Accountability Industry Standards Ethical Wage Structure **Ethical Conduct** 





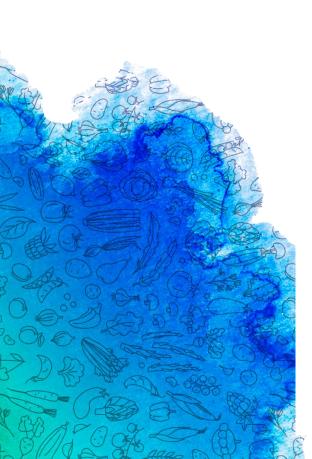
#### **THEME 3 | GOVERNANCE - Activities**

Responsible Sourcing Financial Reporting **Board Diversity** Sai Platform Esg **Corporate Governance Codes Financial Disclosures** Efi Task Force On Climate Stakeholders Uncac **Corporate Governance** Tofd Integrated Reporting B Corp Regulations Dei lta Shareholder Engagement **Governance** Practices



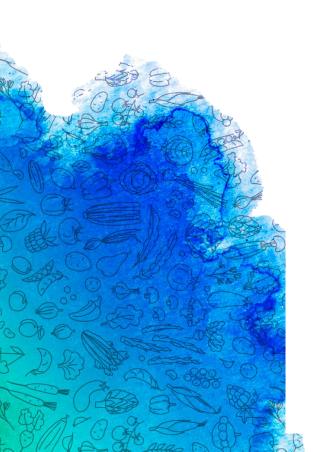
### THEME 3 | GOVERNANCE - Risks

Good Governance Principles Harmonized Regulations **Compliance Obligations** Conflicts Of Interest Integrity Regulatory Scrutiny Corruption Bribery Data Privacy Corporate Governance **Enforcement Mechanisms Board Effectiveness Regulatory Compliance Accounting Irregularities** 



### **THEME 3 | GOVERNANCE - Actions**

International Standards **Regulatory Compliance Governance Priorities Regulatory Oversight Governance Practices** Global Standards Governance Work Compliance Accountability Governance Standards **Regulations** Regulatory Authorities **Stakeholder Engagement Continuous Improvement** 



# Foster

#### TAKING ACTION - NEXT STEPS & ACTION ITEMS International Sustainability Summit Friday April 26 2024 | Vancouver

#### **ONGOING DIALOGUE**

Share the Summit presentations, recording & contact information

#### FINALIZE DRAFT FRESH PRODUCE SUSTAINABILITY CHARTER

Seek participant comments on draft fresh produce sustainability charter

#### **ADVOCACY & PROMOTION**

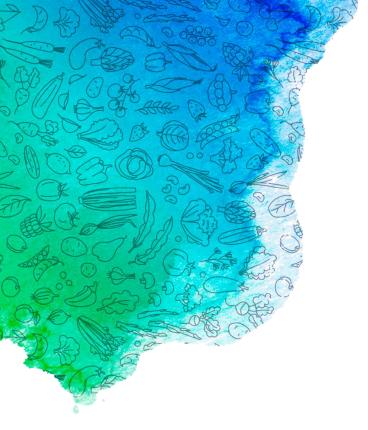
Share and disseminate the Summit Report, including the Draft • Charter (Spring/Summer 2024)

#### **ACTION TOWARDS HARMONIZED SUSTAINABILITY** PRACTICES

Promote priority actions towards harmonized sustainability practices (Summer 2024 onward)



**CLOSING REMARKS & SUMMIT CLOSE** International Sustainability Summit Friday April 26 2024 | Vancouver



#### **INTERNATIONAL SUSTAINABILITY SUMMIT** Friday April 26 2024 | Vancouver









**Global Coalition of Fresh Produce** 







