Sustainability Requirements in Canada and the US: 
*Increasing Momentum*

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OVERVIEW

North America

• A different approach than the EU on sustainability in the biofuels sector

Result

• Food sector in North America has not relied on sustainability criteria in the biofuels sector (and often is not aware of these criteria)

Both agricultural suppliers and retailers

• Trying to establish the way forward

• Lots of uncertainty and different approaches being considered
Canadian Momentum

Major national initiative in Agriculture:

• Canadian Roundtable on Sustainable Crops

All crop groups part of the dialogue

• Getting ready for markets
• Developing a common metrics “Platform”
• Dialogue with retailers and processors

Some commodities like canola are “sustainability-ready”

Crop groups in province of Alberta

• Conducting a large sustainability “readiness” study
Canadian Momentum

Canadian Roundtable on Sustainable Crops

**CHALLENGE**

- Wide range of common metrics
- Different customers using a different “mix” of these metrics
- ISCC has been part of the dialogue in Canada
Canadian Momentum

New marketplace “sustainability” coalition established

- The “Provision Coalition” (food and beverage)
- Canada’s largest food retailer involved
- Sustainability questions the coalition will ask from suppliers
  - Where are you sourcing from?
  - Are your products sustainably made?
  - Are you collecting meaningful data?
  - Can you verify it?

Also many activities by the Canadian Government:

- Research studies, satellite imagery work, conferences
USA Momentum

Big market, many different and large commodity groups

More and more sustainability activity. Examples:

• More sustainability conferences
  • Sustainable Brands Conference had 4,000 (!) attendees last year

• More US consultants involved (e.g. PWC, Deloitte)

• California will require EU type sustainability criteria for biofuels

• More big US companies actively involved
  • Wal-Mart Sustainability Expo April 29, 2014
  • 400 companies attended representing over $500 billion in annual sales
  • All signed a sustainability action “pledge”
USA Momentum

Most important sustainability “selfie” ever taken!

• Taken by Wal-Mart CEO after each CEO signed sustainability pledge

CEO’s from Cargill, Pepsi, General Mills, Kellogg’s, Proctor and Gamble, Johnson & Johnson, Unilever, and NGO Environmental Defense Fund
SUMMARY

• Lots of sustainability momentum in North America

• Very different than three years ago

• Canada
  • Recognition - sustainability will be an important future factor in the market
  • Agriculture sector actively involved
  • Big concerns about different criteria applied by different markets

• USA
  • Many different parties involved
  • Different criteria and “schemes” being developed by different parties, so concerns about that
  • Retailers will have an important impact on supply chains

• ISCC
  • An established system for markets that want verification and certification
  • How many markets will be looking for this level of certainty? Not yet clear, some will
  • Provides opportunities for ISCC in North America
Thank You

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