



October 2024

Canadian Agri-Food in a Sustainable World

Tensions, Challenges, Opportunities

What We Heard Report prepared
for CAPI by Margaret Zafiriou





National Index on Agri-Food Performance



Centre for Agri-Food Benchmarking

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The Canadian Agri-Food Policy Institute's mission is to lead policy development, collaborate with partners and advance policy solutions within agriculture and food.

The mission of the Centre for Agri-Food Benchmarking is to credibly present the agri-food sector's sustainability credentials to create value. The Centre leads a broad coalition to define what counts as evidence of sustainability in the agri-food sector. Through benchmarking, it ensures the indicators remain relevant for monitoring outcomes in four key areas: environment, food integrity, economic well-being, and societal well-being.

The Centre for Agri-Food Benchmarking is housed within the Canadian Agri-Food Policy Institute.

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Thank you to the conference partners who helped to make Canadian Agri-Food in a Sustainable World possible and to the exceptional speakers who participated in each panel, providing their insights and expert opinions on the critical conversations that took place during the conference.





Note from CAPI

The **Canadian Agri-Food Policy Institute (CAPI)** promised that **Canadian Agri-Food in a Sustainable World**, hosted in partnership with the **Centre for Agri-Food Benchmarking**, would lead to lively debate about tensions, challenges and opportunities related to sustainability in agriculture and food, and it did not disappoint. It brought together more than 200 leaders from industry, government, associations, civil society and academia from across the country and the world, for dialogue and debate around this contentious topic.

The two day event offered participants insight and food for thought: What does sustainability mean? How do we measure it? Are current policy approaches effectively delivering the environmental and economic outcomes we need or is a revamped approach needed? Who should be at the table to decide? And is industry doing its part? Finally, what role does CAPI's Centre for Agri-Food Benchmarking and its National Index for Agri-Food Performance play in the rapidly evolving world of ESG standards? What follows are the five key takeaways we heard from the conference:

Key Takeaways

1. Defining sustainability remains confusing, complex and misunderstood, but it is still worth pursuing for long term viability.

While sustainability should account for all three outcomes (i.e. environmental, social and economic viability), current policies and standards have focused primarily on environmental goals. This has created tensions with key stakeholders (i.e. farmers), since policies and standards must be economically sustainable or there won't be food.

2. Measuring sustainability with credible data and a framework of consistent standards is essential.

Yet issues around data access, privacy and governance, and inconsistency across many different (ESG) standards have slowed progress. The National Index is a first step to meet these goals and can complement Canadian ESG standards.



3. The diverse voices of multiple stakeholders in agri-food require consulting, collaborating and communicating widely, since one size does not fit all. Consulting broadly with all stakeholders is essential to account for differences when defining strategies and determining policies and solutions since each can bring their valuable knowledge to the table. Working collaboratively across the sector will help us identify and prioritize the issues that we have in common.

4. Government's role is to ensure policies are effective so outcomes can be achieved, but industry must do its part to show leadership. Government can enable, facilitate and incentivize through policies, investment and knowledge sharing, while agri-food stakeholders need to manage risks and adjust and adopt new business strategies and practices, requiring leadership on both sides.

5. Canada needs a clearer long-term vision and strategy for sustainability. While Canada has what it takes to lead the way in sustainable agri-food production and trade given its abundant land, water, capital and human ingenuity, progress has been slow and greater commitment is needed.

Key actions moving forward for both industry and governments include:

- Creating a coherent vision and a strategy;
- Showing leadership;
- Rebalancing the emphasis of policies and strategies on the three aspects of sustainability – economic, environmental and social, focusing on outcomes, not practices;
- Aligning those outcomes and improving data and measurement;
- Enabling, facilitating and empowering stakeholders in the agri-food industry;
- Strengthening partnerships and collaborating to build trust, leveraging support in advocacy and developing one message;
- Investing in innovation and technologies that lead to increased efficiencies and productivity growth;
- Investing in people and skills;
- Learning from other industries and countries who have gone ahead (i.e. Australia, forestry and aquaculture); and
- Communicating well and often on the sector's sustainability outcomes to increase awareness and understanding.

Speakers



Alanna Koch
Board Chair
*Global Institute for
Food Security*



Ben Gibbons
Founder & Managing
Partner
Waterpoint Lane



Brent Preston
President
*Farmers for
Climate Solutions*



Bruce Marchand
Interim Chair
*Canadian Sustainability
Standards Board*



Bryan Gilvesy
CEO
ALUS



Carlos Salinas
Regional Director
*U.S. Soybean Export
Council (USSEC)*



Claire Citeau
Senior Research
Fellow
CABI



Coro Strandberg
President
Strandberg Consulting



Darlene McBain
Director, Industry
Relations
Farm Credit Canada



David McInnes
Senior Fellow and
Founder
*Centre for Agri-Food
Benchmarking*



Derek Nighbor
President & CEO
*Forest Products
Association of Canada*



**Dori Gingera-
Beauchemin**
Board Member
CABI



Greg Northey
Vice President
Corporate Affairs
Pulse Canada



Isabelle Mégré
Director,
Montreal office
IFRS Foundation



Jean-Michel Couture
President and Partner
Group AGÉCO

Speakers



Jim Eckberg
Senior Scientist
General Mills



Kate Harrison
Vice-Chair
Summa Strategies
Canada



Katie McRobert
Executive Director,
Australian Farm
Institute (AFI)



Lloyd Day
Deputy Director
General
IICA



Mark Redmond
Chief Executive Officer
RDAR - Results Driven
Agriculture Research



Mark Titterton
Co-Founder and
Director
Forum for the Future of
Agriculture (FFA)



**Maxim Legault-
Mayrand**
Senior Manager,
Government Affairs
Danone Canada



Michael Harvey
Executive Director
Canadian Agri-Food
Trade Alliance (CAFTA)



Michelle Leslie
Senior Manager
Infrastructure &
Capital Projects
Deloitte



Mike Wilson
Executive Director
Smart Prosperity
Institute



Natacha Houde
VP Sustainable
Development
Inno-Centre



Nick Betts
Managing Director
Canadian Alliance for
Net-Zero Agri-food
(CANZA)



Pierre Petelle
President & CEO
CropLife Canada



Robin Booker
Editor
The Western Producer



Rory McAlpine
Chair, Board of
Directors
CAP1

Speakers



Selene Munro

Director, Sustainability
United Farmers of Alberta
Co-operative Limited



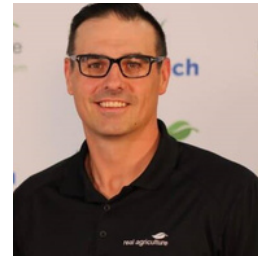
Scott Ross

Executive Director
Canadian Federation
of Agriculture



Shari Rogge-Fidler

President & CEO
Farm Foundation



Shaun Haney

Founder
RealAgriculture



Steven Jurgutis

Director General, Policy
Planning and Integration
Agriculture and Agri-Food
Canada



Stuart Person

National Leader of
Crop Services
MNP



Sylvie Cloutier

CEO
CTAQ



Tarra Drevet

Executive Director
Centre for Agri-Food
Benchmarking



Timothy Kennedy

President & CEO
Canadian Aquaculture
Industry Alliance



Tyler McCann

Managing Director
CAPI

"It was heartening to see so many organizations and individuals dedicated to the sector and improving sustainability. Canadian agriculture has come a long way in improving productivity and economic outcomes and we have a positive story to tell. There is work to do on bridging the gap between policy makers and those in the supply chain, being more discerning about the quality of environmental data and how it is being aggregated, and supporting farmers with practice and technology implementation."

Erin Wynands, ACER Consulting

Defining sustainability remains confusing, complex and misunderstood, but it is still worth pursuing for long term viability

Sustainability has been a topic of discussion and a focus of governments for several decades, yet there is still confusion over its definition. Some refer to it as a “[wicked problem](#)”, with all its complexity and uncertainty. Thus, it came as no surprise that there is disagreement over its definition. **Stuart Person** of MNP argued that the sector has struggled with the definition, given the variety of opinions about its meaning.

While environmental sustainability has been the main emphasis in recent years, **Lloyd Day**, Deputy Director General of the Inter-American Institute for Cooperation on Agriculture (IICA) argued that we need to look at all three pillars (environmental, economic and social). Sustainability is fundamentally grounded in the bottom line said **Scott Ross**, Executive Director of the Canadian Federation of Agriculture (CFA). If farmers aren't economically viable, there won't be food, said **Carlos Salinas**, Regional Director of the U.S. Soybean Export Council (USSEC), and the true cost of food should be valued. **Shari Rogge-Fidler**, President and CEO of the Farm Foundation agreed and stated that on her farm, the goal is to “be able to ensure production for generations to come”. Decisions we make today will determine the outcomes we are trying to get in the long term, said **Ben Gibbons**, Founder and Managing Partner of Waterpoint Lane. Hence, sustainability as a long-term concept requires a long-term vision and strategy. This vision may require transformational change, said **Katie McRobert**, Executive Director of the Australian Farm Institute (AFI) which requires leadership.



Delegates participated in two days of sessions on the **tensions, challenges, and opportunities** for sustainability in the Canadian agri-food sector.

Measuring sustainability with credible data, a framework and consistent standards is essential

Without a clear definition of sustainability and data to measure it, progress may be too slow. **David McInnes**, former Executive Director and Founder of the Centre for Agri-Food Benchmarking summed up at the end of Day 2: “if we don’t measure ourselves, we will be measured.” This motivated the [National Index on Agri-Food Performance](#) coalition to develop a model, a methodology and a framework, founded on good data. Drawing on the Index and [global benchmarking exercises](#), significant progress has been made on measuring sustainability of the agri-food sector. **Bruce Marchand**, Interim Chair of the Canadian Sustainability Standards Board (CSSB) applauded CAPI and the Centre for its leadership in developing a credible source and systems thinking approach for improving data on sustainability.

But there is still more work to be done, reported **Dr. Tarra Drevet**, Executive Director of the Centre. Over the next two years, it will continue to evolve so it can be used to benchmark sustainability, as a marketing tool, to build trust, support SMEs and business decision-making, and policy and skills development as a complement to the ESG standards that are being developed for Canada. The Index of course rests on good data. And data factors in big time, said **Stuart Person** of MNP, since we won’t know how sustainable we are unless we have the evidence to prove it. **Rory McAlpine**, Chair of CAPI’s Board of Directors and formerly of Maple Leaf Foods (MLF) reinforced this message with comments on lessons learned from the listeria case at MLF in 2008. “Data is everything” he said.

Rory McAlpine, Chair of CAPI Board of Directors, kicked off the opening fireside chat.

What we can learn from international experience

Panelists from the [Global Forum on Farm Policy and Innovation](#) (GFFPI) discussed sustainable production, trade and measurement. **Katie McRobert** of Australia Farm Institute described this [framework](#) for measuring sustainability in Australian agriculture. This initiative was motivated by trade and market access risks arising from competing countries' policies and brought together Australia's diverse commodity sectors, breaking down silos, developing consensus and enabling trade. **Mark Titterington**, Co-founder and Director of the Forum for the Future of Food and **Shari Rogge-Fidler** both argued that farmers will come onside if the focus is on outcomes rather than practices. In the EU, policy makers realized they can't do without farmers who need to be paid for what they are trying to do, and this is only possible if performance is outcome-based. This requires individual farm level data, which also benefits farmers and businesses by informing them for better decision-making, said **Jean-Michel Couture**, President and Partner, Group AGÉCO.

Tensions around farm level data

Yet access to individual farm level data, privacy concerns and a lack of data governance, have created pushback. Farmers are willing to share their data as long as there is trust, said **Scott Ross**. This requires partnerships. **Alanna Koch**, Board Chair of the Global Institute for Food Security (GIFS) argued that data costs her money to collect so she is hesitant to give it up. **Natacha Houde**, VP of Inno-Centre, added that small agri-food businesses and processors face increased burden and costs associated with data collection. **Justine Hendricks**, CEO of Farm Credit Canada (FCC) argued that while there are challenges, there also can be benefits. Monetizing the rewards to farmers requires data and if you want to benefit from sustainable finance, a fair amount of data is required. But the challenge is everyone has their own data, and it needs to be consolidated in one place. FCC leverages partnerships to collect individual data and consolidates it on their data platform. The CFA also emphasized the importance of data consolidation in their [recent study](#) on data as a foundation for sustainable productivity growth.



Claire Citeau, Carlos Salinas and virtual panelists Shari Rogge-Fidler, Mark Titterington, and Katie McRobert (not shown) considered agricultural sustainability in a global context.

Data and standards allow for communicating to stakeholders

But it is not just about having the data. It is about being able to communicate results effectively to report on progress, access markets and reassure buyers and the public. This was a key message of **Derek Nighbor**, President and CEO of the Forest Products Association of Canada (FPAC) and **Tim Kennedy**, President and CEO of the Canadian Aquaculture Industry Alliance (CAIC). **Derek** and **Tim** both argued that the journey to sustainability in forestry and aquaculture has not been easy. Both have faced opposition from environmental groups and the public, and from government regulations and policies that created roadblocks. FPAC is a fact-based organization **Derek** argued, and communication has been key to target confusion and get fact-based information out there. Because forestry and agriculture values align well (i.e. both are resource-based and rural), there is much to learn from each other. Both sectors need to work harder and smarter to achieve results.

Nick Betts, Managing Director of the Canadian Alliance for Net Zero Agri-Food (CANZA) reminded us that like food safety in the 1990s, sustainability is a pre-competitive concept that requires collaboration across the value chain to keep our food safe. **Derek Nighbor** also emphasized the value of partnerships, such as the Nature Conservancy of Canada and municipal officials. While they don't always agree, these partners have been important allies to speak on FPAC's behalf as third-party validators, lending credibility to their sustainability story. Certification has also been critical for communicating, assuring consumers and building trust.

To not confuse consumers, **Carlos Salinas** argued we must be cautious how we measure sustainability and bring products to market. Consumers are important for giving us market signals said **Jean-Michel Couture** of AGÉCO, but they are not the main drivers. Rather, sustainability is more about the social aspects of businesses. This provides Canada with a number one competitive advantage he said. **Ben Gibbons**, Founder and Managing Partner of Waterpoint Lane, disagreed. He believes sustainability is an outcome and a goal we need to achieve through good business practices and effective operational efficiency leading to both productivity growth and profitability. He felt that Wall Street is almost as big a driver as consumers for sustainability. **Sylvie Cloutier**, CEO of Le Conseil de la transformation alimentaire du Québec (CTAQ) agreed that interest in sustainability is coming from investors and supply chain clients rather than consumers, since consumers are not ready to pay for sustainable products. But who will pay for it if consumers won't? Should farmers bear the cost? **Jean-Michel Couture** argues there are potentially three sources – consumers, taxpayers or productivity gains and efficiency, depending on the issue you are tackling.



Derek Nighbor and Tim Kennedy provided unique perspectives on sustainability from other sectors in **Sustainable Agriculture – Lessons from Others**, moderated by **Darlene McBain**.

ESG Standards and the Agri-food Sector

Interest and market trends tell us that ESG standards are here to stay, said **Derek Nighbor** of Forest Products Association of Canada. This is because capital markets and businesses need to be sustainable over the long term. This implicates farmers and agri-businesses since Scope 3 inputs will soon be part of those ESG standards. On Day 2, focusing on ESG and the Index, **Isabelle Mégré**, Director of the International Financial Reporting Standards Foundation (IFRS) provided a good overview of ESG standard developments facing Canadian companies. Canada provided substantial input in their development for implementation in 2025, said **Bruce Marchand**, Interim Chair of the Canadian Sustainability Standards Board (CSSB). These standards are a useful framework for reflecting on risks and opportunities starting with climate-related disclosure. And while large companies are subject to them on a voluntary basis, SMEs are exempt.

Agri-food industry panelists suggested that ESG standards provide a useful framework to allow companies to compare their performance across industries and countries and can help differentiate and provide transparency. They can also provide data and information to help make better informed business decisions, argued **Selene Munro** of United Farmers of Alberta. **Michelle Leslie**, Senior Manager at Deloitte said they can help farmers report on the social good they are already doing, taking away the burden of proof with data that can influence policymakers. **Maxim Legault-Mayrand**, Senior Manager of Government Affairs at Danone Canada said they can help communicate results to investors. However, **Natacha Houde**, VP of Inno-Centre argued that ESG standards are complex and add additional cost burden for SMEs in food processing, making it hard to comply. For **Greg Northey**, VP Corporate Affairs of Pulse Canada, ESG requirements are not trickling down to (pulse) markets or their bulk pulse suppliers. What matters most to their customers are reliability of supplies, compliance with the Canadian Grain Commission's standards and cost competitiveness. **Katerina Kolemishenska**, Director of Policy Development at the Canadian Pork Council, agreed that competitiveness is more important for pork producers than these standards. However, in smaller, niche markets that are more price sensitive, ESG standards can help diversify markets, added **Greg Northey**.



Panelists from **What ESG means for Canada's Agri-Food Sector** discuss the implications of changing ESG standards.

The diverse needs and voices of multiple stakeholders in agri-food require consulting, collaborating and communicating widely, since one size does not fit all

The Canadian agri-food sector is diverse and heterogeneous, where there can be large differences across regions, commodities, value chain players and size of operation (i.e. SMEs). When it comes to sustainability, there are also many voices and interest groups with opposing values. Environmentalists have their priorities which may not match producers. So, there are bound to be tensions when developing policies and strategies around sustainability. Consultation and collaboration with all stakeholders, early and often are key to aligning sustainability outcomes. **Dr. Mark Redmond**, Chief Executive Officer of Results Driven Agriculture Research (RDAR), argued that much of the distrust between industry and government over the fertilizer targets, pesticide regulations and the Sustainable Agriculture Strategy (SAS) was due to the lack of consultations early on, leading to the perception that decisions were a fait accompli. However, the onus lies not only with government, but producers, who need to show up (**Brent Preston**). **Dori Gingera-Beauchemin**, CAPI board member, recommended that farmers should not wait to be invited to the table, but should make sure their organizations are present.

Dr. Redmond gave the example of [Living Labs](#) in Alberta, a program that brings farmers and scientists together right from the start, as a condition for funding. **Brent Preston**, President of Farmers for Climate Solutions (FCS) said farmers have such a wealth of knowledge to add to consultations. **Jim Eckberg**, Senior Scientist at General Mills, suggested that everyone has unique skills they can bring to the table. **Alanna Koch** emphasized the importance of respect and non-polarizing language during consultations, at the same time that they are meaningful, results-focused and based on practicality. This is to prevent nebulous conversations, said **Scott Ross**.



Panelists provided their perspectives on the future of sustainability during **Moving Forward on Sustainable Agriculture**.

Government's role is to ensure policies are effective so outcomes can be achieved, but industry must do its part to show leadership

Sustainability is a priority of the current Government of Canada (GOC) given its international commitments, such as the UN Sustainable Development Goals (SDGs) and climate change, methane and biodiversity targets. The \$3.5 billion Federal-Provincial-Territorial (FPT) five year agricultural policy framework (SCAP) positions the sector for sustainability, viability and competitiveness while AAFC's Sustainable Agriculture Strategy (SAS) will provide direction, once finalized. Yet industry continues to battle some of the policies and legislation that have been introduced, despite lengthy consultations. According to **Mike Wilson**, Executive Director of the Smart Prosperity Institute, industry has lost faith in government to make changes.

What are effective roles for government and industry to achieve sustainability outcomes? **Mike Wilson** suggested that government should be a partner and an enabler, (and not a central planner), who should lean in to market based solutions and help de-risk innovation. **Mark Redmond** argued that government should empower farmers and protect the health of workers, but not to overreach. Similarly, **Pierre Petelle**, President and CEO of CropLife Canada, said that the government's role is to enable and collaborate but not to set up barriers. **Dori Gingera-Beauchemin** argued the government has a facilitating role, through knowledge sharing and managing disagreements.

Good public policy should look for areas where there are both economic and environmental benefits and good outcomes (e.g. precision agriculture) said **Brent Preston**, since most Canadians want both (**Mike Wilson**). To get environmental outcomes, we don't need to give up on productivity, explained **Alanna Koch**. Rather they can go hand in hand. **Ben Gibbons** argued that instead of environmental sustainability, the policy discussion should focus on the opportunities that technology and innovation can provide. This requires industry to improve its business practices and invest in technology. **Lloyd Day** reminded us how innovation along with trade has raised living standards and improved quality of life everywhere. To ensure the existential threat of climate change and feeding the world can be addressed in the long term, we need to double down on innovation. This will require investment and partnerships to share the burden of risks and the costs of implementation.

"The meeting was an excellent opportunity to hear viewpoints about sustainable agriculture from across a wide range of stakeholders, both offered on the podium and during the casual networking chats."

Silke Nebel, Birds Canada

The private sector works off of incentives said **Shari Rogge-Fidler**, so incentives can help spur innovation and the adoption of new practices by offsetting the costs of introducing new practices and technologies. This was the rationale behind the On Farm Climate Action Fund (OFCAF) said **Steven Jurgutis**, Director General of Policy Planning and Integration at AAFC, which has been oversubscribed. Knowledge sharing and partnerships are also key to spurring innovation and adoption, the goal of the Living Labs program. This reminds us of extension programs, which governments unfortunately abandoned. Yet, **Bryan Gilvesy**, CEO of ALUS, argued that the success of the ALUS program is founded on people on the ground in communities doing extension work for farmers. ALUS has been the model for the federal government's [Resilient Agricultural Landscape Program \(RALP\)](#), which expands this principle with funding across the country.

Government regulations are another instrument used to address environmental goals, but they are often burdensome, a barrier to innovation and a blunt tool. **Pierre Petelle** reminded us of the burden of regulations European farmers face, that triggered farm protests last spring. There is no appetite for more regulations in agriculture, said **Katie McRobert**, as more will not necessarily improve environmental outcomes (**Jean-Michel Couture**). Given that we operate in a very global food system that is highly competitive, over regulations can undermine our competitiveness, said **Ben Gibbons**. And given the need for innovation and technology, we need to be careful how we regulate to get the desired results without shooting ourselves in the foot.

Brent Preston suggested that the best defense to get ahead of regulations is for industry to communicate to government its ambitions as a solutions provider. This implies that industry has a responsibility to do a better job speaking with one voice when lobbying government and providing direction, even though it is often a struggle to come together, said **Scott Ross**. **Kate Harrison**, Vice-Chair of Summa Strategies Canada agreed and recommended that since government is constantly being bombarded with messages, if the sector wants to be heard, it should use direct advocacy, bring one message and engage with other groups (e.g. DUC) to get the message across.



In the **The Politics of Sustainability**, panelists considered the key principles guiding sustainability politics in agri-food.

Canada needs a clearer long-term vision and strategy for sustainability

While Canada has what it takes to lead the way in sustainable agri-food production and trade, including abundant land, water, capital and human ingenuity, and has made some progress, there is still much to do.

Key actions moving forward for both industry and governments include:

- Creating a coherent vision and a strategy;
- Showing leadership;
- Rebalancing the emphasis of policies and strategies on the three aspects of sustainability – economic, environmental and social, focusing on outcomes not practices;
- Aligning those outcomes and improving data and measurement;
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- Learning from other industries and countries who have gone ahead (i.e. Australia, forestry and aquaculture); and
- Communicating well and often on the sector's sustainability outcomes to increase awareness and understanding.

Media Coverage

