



GLOBAL ROUNDTABLE FOR
SUSTAINABLE BEEF[®]

2018

SUSTAINABILITY
REPORT





Who We Are

The Global Roundtable for Sustainable Beef (GRSB) is a global, multi-stakeholder initiative developed to advance continuous improvement in sustainability of the global beef value chain through leadership, science and multi-stakeholder engagement and collaboration. The GRSB envisions a world in which all aspects of the beef value chain are **environmentally sound, socially responsible and economically viable.**

GRSB is the strategic platform where leading stakeholders from within the beef industry, environmental organizations, retailers and others with a close interest in the beef industry come together to advance continuous improvement in sustainability of the global beef value chain through knowledge sharing, leadership, science and multi-stakeholder engagement and collaboration.





Perspectives from the President and Executive Director

The Global Roundtable for Sustainable Beef (GRSB) formed in 2012, and today covers the major beef producing countries of the world. There are now allied sustainable beef roundtables or initiatives in over 20 countries, and as a world first, verified sustainable beef is being sold by our members in Canada.

The work of the GRSB is global in nature and brings together the work of all of the national initiatives. It is only through the national initiatives that we are able to create impact on the ground, as the nature of beef production varies widely according to the environmental and cultural conditions in which they operate. The challenges in each region are different and so are the solutions.

Based on our global definition of sustainable beef as a socially responsible, environmentally sound and economically viable product that prioritizes Planet, People, Animals and Progress using our five principles covering Natural Resources, People and the Community, Animal Health and Welfare, Food, Efficiency and Innovation, the national roundtables and initiatives prioritize and refine our criteria, and develop metrics and means of verification to ensure that they are on a path of continuous improvement.

At the 2016 Global Conference on Sustainable Beef held in Banff, Canada, we learned how the beef industry was developing capabilities to improve sustainability regionally and globally. That trend has continued apace, and while in 2016 we were able to hear updates from five countries, our 2018 conference in Kilkenny, Ireland will bring together representatives from more than 20 countries, ten of which will report not only on their experiences, but also on the impacts their initiatives are already having on the ground.

This report showcases several of these efforts, and many more will be shared at 2018 Global Conference on Sustainable Beef as well as through the GRSBeef.org website.

The global beef sustainability movement has made great strides to demonstrate to the world that the beef industry cares about its role in the world, in communities, and in looking after the environment, as well as providing safe and nutritious food for the world's growing population. The GRSB and all of our members know that we can and must continue to improve for the benefit of People, Planet, Animals and Progress.

Sincerely,

A handwritten signature in black ink, appearing to read "Nicole Johnson-Hoffman".

Nicole Johnson-Hoffman, President
Global Roundtable for Sustainable Beef

A handwritten signature in black ink, appearing to read "Ruairaidh Petre".

Ruairaidh Petre, Executive Director
Global Roundtable for Sustainable Beef



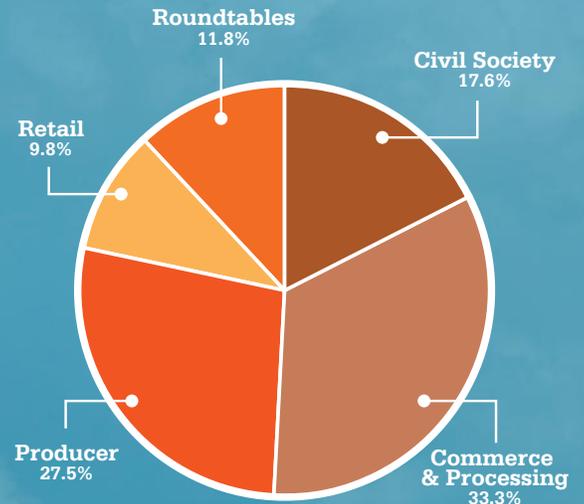
Leadership

The framework of the GRSB consists of six constituencies: producers and producer associations, the commerce and processing sector, retail companies, civil societies, allied industry and national or regional roundtables. The possibility to participate as an observer member also exists.

Of the general assembly, 20 members make up the Board of Directors; and six positions constitute the executive committee, which consists of a president, vice president, secretary-treasurer, and two at-large members and past president. Committees to cover the work of the roundtable itself are formed from the membership and include Finance, Membership, Sustainability Definition and Communications Committees.

The board creates technical working groups and guides their scope of work. It is through these working groups that most of the GRSB's work is accomplished. Some of the areas that the working groups are addressing include deforestation, life cycle assessment, metrics and reporting, harmonization, and the convening of global conferences.

GRSB Membership





Executive Committee



President
Ms. Nicole Johnson-Hoffman
OSI Group, LLC



Vice President
Dr. Leon Mol
Ahold Delhaize



Secretary - Treasurer
Mr. Carlos Saviani
World Wildlife Fund



Member-at-Large
Mr. Lucas McKelvie
McDonald's Corporation



Member-at-Large
Mr. Cameron Bruett
JBS USA



Immediate Past President
Mr. Dennis Laycraft
Canadian Cattlemen's
Association

Administration Staff



Executive Director
Ruaraidh Petre



**Regional Director
South America**
Josefina Eisele



**Director of
Administration and
Finance**
Kraig Roesch



**Director of
Operations and
Member Services**
Mona Wolverton



**Director of
Development**
Katie Ambrose



**Communications
Coordinator**
Polly Weldon



Communication
Sarah J.
Bohnenkamp

Board of Directors

PRODUCER

- Beef + Lamb New Zealand
- Canadian Cattlemen's Association
- National Cattlemen's Beef Association

COMMERCE & PROCESSING

- Cargill
- OSI Group, LLC
- Rabobank

RETAIL

- A & W Food Services of Canada
- Ahold Delhaize
- McDonald's Corporation

CIVIL SOCIETY

- Fundación Solidaridad Latinoamericana
- Rainforest Alliance
- World Wildlife Fund

ROUNDTABLE

- Canadian Roundtable for Sustainable Beef
- GTPS - Brazilian Roundtable for Sustainable Livestock
- Mesa de Ganadería Sostenible Colombia
- U.S. Roundtable for Sustainable Beef

ALLIED INDUSTRY (vacant)



Sustainable Beef Milestones



2014
1st Global Conference on Sustainable Beef
BRAZIL



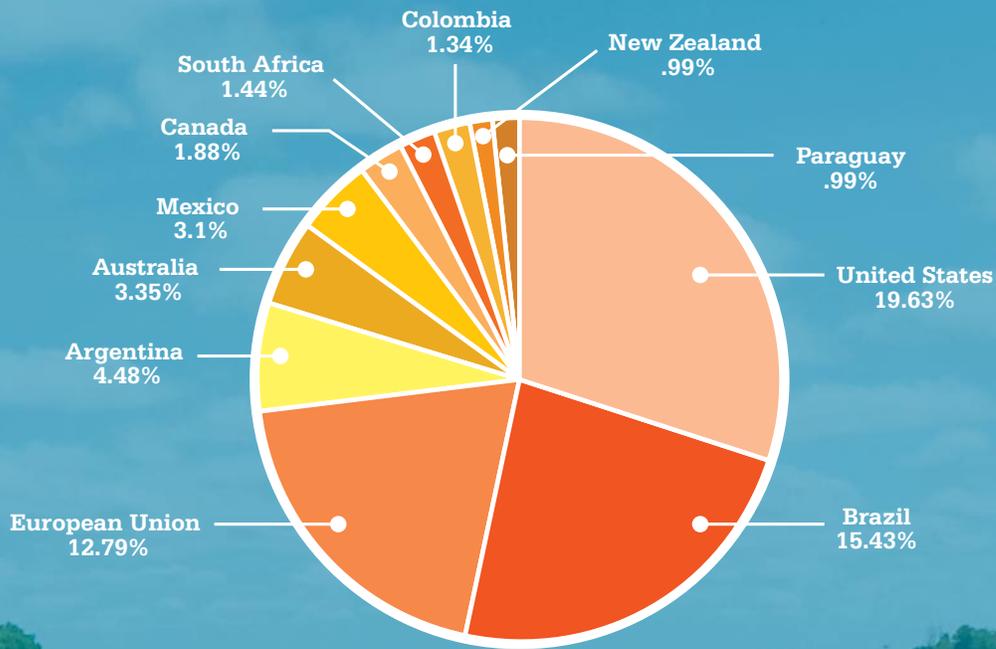
2016
2nd Global Conference on Sustainable Beef
CANADA



2018
3rd Global Conference on Sustainable Beef
IRELAND




World Beef Production Represented in GRSB Membership



Cattle Production Fact:
The United States, Brazil and the European Union produce roughly 47% of the world's beef.

Source: <http://beef2live.com/story-world-beef-production-ranking-countries-0-106885>



**GLOBAL ROUNDTABLE FOR
SUSTAINABLE BEEF[®]**



GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF®

Membership

PRODUCER & PRODUCER GROUP

- Beef + Lamb New Zealand
- Canadian Cattlemen's Association
- Cattle Council of Australia
- Certified Angus Beef LLC
- Coyote Creek Angus
- Dairy Sustainability Framework
- Desarrollo Agrícola del Paraguay S.A.
- Elandsvreugde
- Hy-Plains Feedyard, LLC
- McFaddin Enterprises
- Mt. Brisbane Pastoral Company
- National Cattlemen's Beef Association
- National Livestock Producers Association
- Willow Creek Ranch

COMMERCE & PROCESSING

- Bayer Animal Health GmbH
- Cargill
- Dow AgroSciences LLC
- Elanco
- Golden State Foods
- GrowSafe
- INALCA S.p.A.
- Indunor
- JBS USA
- Marfrig Group
- Merck Animal Health
- OSI Group, LLC
- Rabobank

RETAIL

- VanDrie Group
- Where Food Comes From, Inc.
- Zandbergen World's Finest Meat
- Zoetis
- A&W Food Services of Canada, Inc.
- Ahold Delhaize
- Bolton Alimentari S.p.A.
- McDonald's
- Restaurant Brands International Inc.

CIVIL SOCIETY

- Conservacion & Desarrollo
- Earth Innovation Institute
- Institute of Ranch Management, TCU
- National Wildlife Federation
- Rainforest Alliance
- Savory Institute
- Solidaridad
- Texas A&M University, Dept. of Animal Science
- World Wildlife Fund

OBSERVING & CONSULTING

- Alberta Agriculture and Forestry
- Bord Bia, Irish Food Board
- Costco Wholesale
- Environmental Energy Capital
- Global Agenda for Sustainable Livestock
- Holly Gibbs, PhD
- Judith Capper, PhD
- SATOTO Consulting

ROUNDTABLE

- Canadian Roundtable for Sustainable Beef
- European Roundtable for Beef Sustainability
- GTPS – Grupo de Trabalho da Pecuária Sustentável
- Mesa Paraguaya de Carne Sostenible
- Mesa de Ganaderia Sostenible Colombia
- U.S. Roundtable for Sustainable Beef

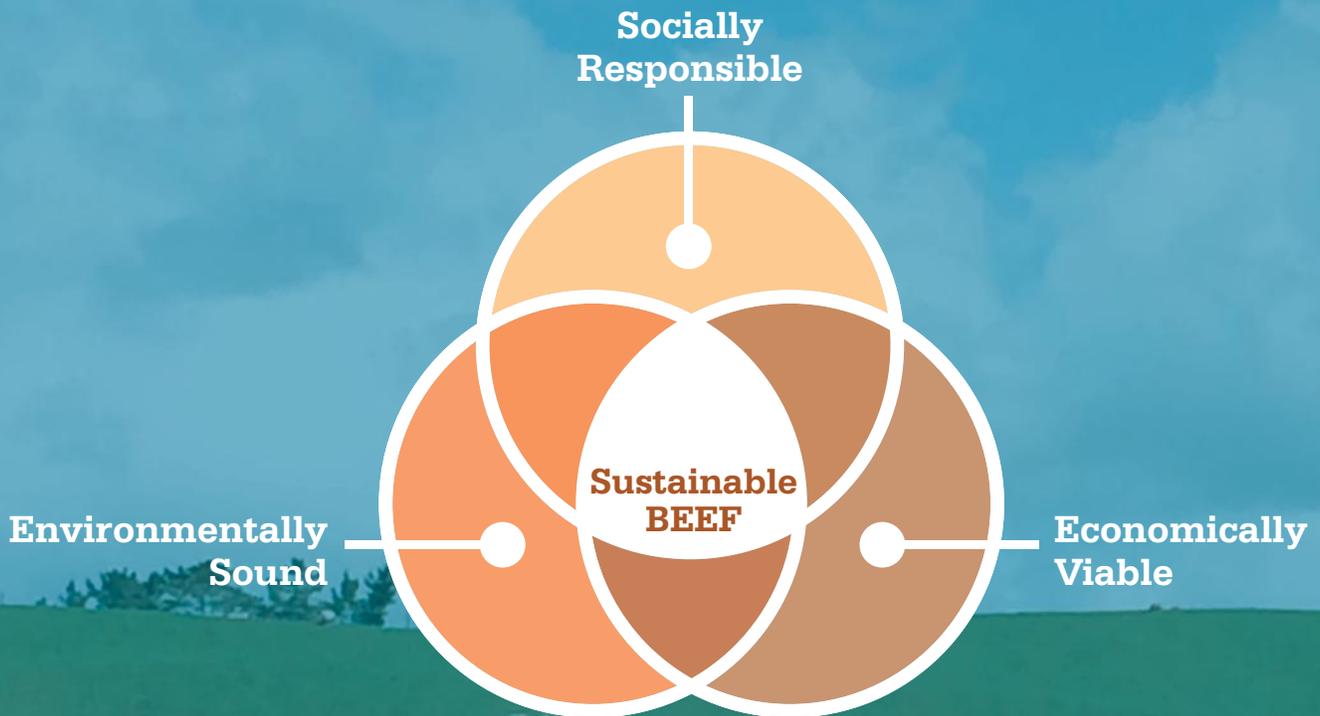
Financial Highlights



For fiscal year-end December 31, 2017

Defining Sustainable Beef

The Global Roundtable for Sustainable Beef defines sustainable beef as a socially responsible, environmentally sound and economically viable product that prioritizes: **Planet, People, Animals** and **Progress**.





GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF®

5 Principles and Criteria of Sustainable Beef



Natural Resources

The global beef value chain manages natural resources responsibly and enhances ecosystem health.



People & The Community

Global sustainable beef stakeholders protect and respect human rights, and recognize the critical roles that all participants within the beef value chain play in their community regarding culture, heritage, employment, land rights and health.



Animal Health & Welfare

Global sustainable beef producers and processors respect and manage animals to ensure their health and welfare.



Food

Global sustainable beef stakeholders ensure the safety and quality of beef products and utilize information-sharing systems that promote beef sustainability.



Efficiency & Innovation

Global sustainable beef stakeholders encourage innovation, optimize production, reduce waste and add to economic viability.

Reference: <https://grsbeef.org/WhatIsSustainableBeef>



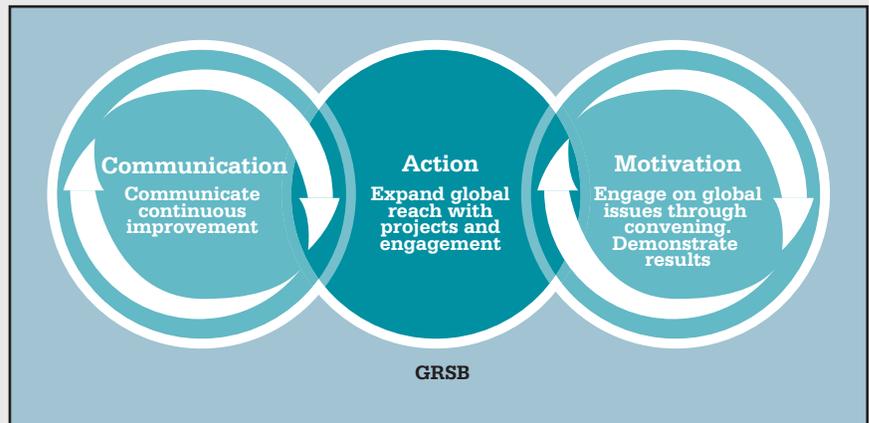
Strategic Goals

2016-2021 Strategic Vision:

GRSB goals for 2016 to 2021, in order of priority are:

1. Expand global reach through new roundtables, projects, and stakeholder engagement

- A. Increase relationships with targeted regions and countries
- B. Support the creation of roundtables in identified countries or regions
- C. Recognize sustainable beef systems based on process and demonstrated impact
- D. Connect donors and prospective project proponents



2. Demonstrate results by creating a data platform, aggregating regional roundtable and project findings, and tracking key global metrics

- A. Create a global platform for data reporting and sharing
- B. Identify key global metrics and develop methods to track from publicly available data

3. Communicate continuous improvement around the globe

- A. Increase awareness and knowledge of sustainability improvements made both by members and others throughout the entire beef value chain and disseminate content to and through members

4. Engage on global issues through convening sectors, roundtables, and geographies

- A. Work with members to identify and share key innovations, tools, and actions
- B. Identify key global and emerging issues, initiate and support issue-action working groups
- C. Host global conferences
- D. Strengthen communication with and participate in domestic, regional, and international bodies and fora such as the FAO

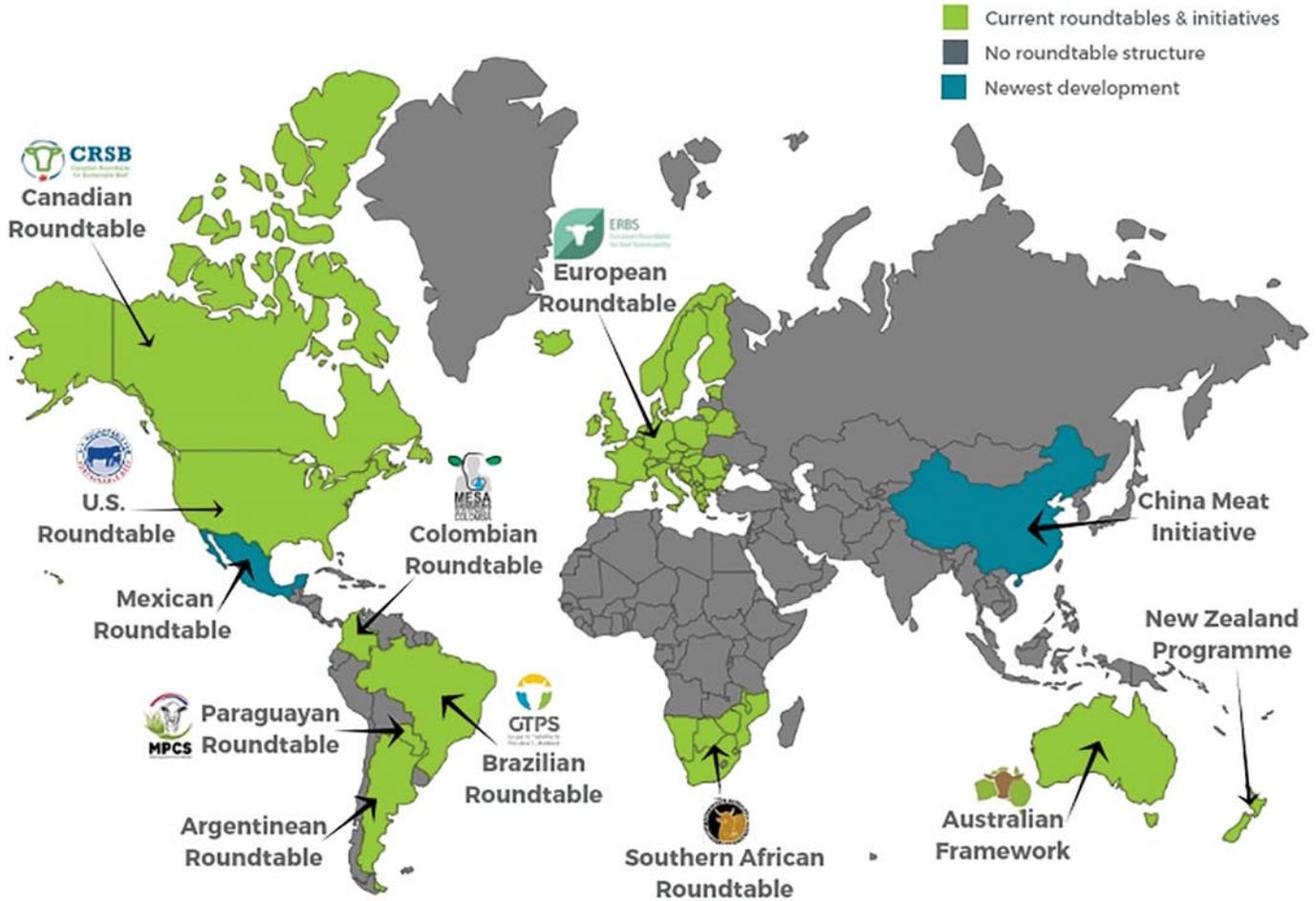
5. Nurture GRSB membership, member value, and revenues

- A. Continuously articulate, refine, and adjust the GRSB value proposition for members to stay engaged and active
- B. Expand the membership within and across sectors and geographies
- C. Conduct annual work planning prior to budgeting under these five-year goals and objectives
- D. Refine the current revenue model



SUSTAINABLE BEEF REGIONAL ROUNDTABLES & INITIATIVES

PEOPLE ~ PLANET ~ ANIMALS ~ PROGRESS



Beef Focused Sustainability Roundtables & Initiatives

- Argentina:** information coming soon (Est. 2017)*
- Australia:** sustainableaustralianbeef.com.au (Est. 2016)
- Brazil:** gtps.org.br (Est. 2008)*
- Canada:** crsb.ca (Est. 2015)*
- China:** meat sustainability initiative under development
- Colombia:** mesaganaderiasoste.wixsite.com/principal (Est. 2013)*
- Europe:** saipatform.org/activities/working-groups/beef (Est. 2018)*
- Mexico:** coming soon (Est. 2018)*
- New Zealand:** beeflambnz.com (Est. 2018)
- Paraguay:** coming soon (Est. 2018)*
- Southern Africa:** coming soon (Est. 2018)*
- United States:** usrb.org (Est. 2015)*

Revised 10.8.18

grsbeef.org ~ [@grsbeef](https://twitter.com/grsbeef) ~ [#sustainablebeef](https://hashtage.com/#sustainablebeef)

*Current GRBS Member or in process



Regional Highlights Australasia

Australian Beef Sustainability Framework



The Australian Beef Sustainability Framework was developed to meet the changing expectations of consumers, customers, investors and other stakeholders.

The Australian industry developed the Framework through extensive consultation with groups including retailers globally, environment and animal welfare groups, banks, institutional investors, government, academics and industry. While the Framework is not formally aligned with the GRSB, there is commonality across many of the GRSB principles and criteria and the Framework's priority areas and indicators.

Launched in April 2017, the Framework sets out a vision for a thriving Australian beef industry that strives to continuously improve the wellbeing of people, animals and the environment.

Across the four themes of animal welfare, economic resilience, environmental stewardship and people & the community, the Framework includes 23 priorities identified by stakeholders and 48 measurable indicators.

The Framework is used to inform industry investment for continuous improvement, foster constructive relationships with stakeholders, help protect and grow access to investment, and promote the industry to community and customers.



Key milestones in the last year are

- Established the Consultative Committee of customers, investors, NGO representatives and other key stakeholders.
- Established an expert working group to advise on refining evidence-based indicators for the balance of tree and grass cover.
- Selected six key priorities for industry action from the 23 priority areas, namely animal husbandry techniques, profitability across value chain, balance of tree and grass cover, antimicrobial stewardship, managing climate change risk, and the health and safety of people in the industry.
- Published the Framework's inaugural Annual Update, which outlines activity underway or planned for the six key priority areas; provides a situation statement and, where data permits, reports on industry performance; and provides case studies of sustainable practice through the value chain.
- Engaged with industry to promote why sustainability is a priority, including participation at the at the biggest event on the Australian beef industry's calendar, Beef Australia.

The Framework has already galvanised industry to act more sustainably. This includes:

- Investigating pathways for the red meat industry to be carbon-neutral by 2030.
- Launched a proactive antibiotic monitoring program in Australian feedlots.
- Announced a \$35 million partnership over five years to improve animal welfare.
- Supported commercial availability of pain relief in late 2016, for producers to administer when castrating cattle. In June 2018, its permitted usage expanded to dehorning and disbudding.
- Added \$120 million in farmgate returns added by the Meat Standards Australia beef program during 2016-17.





CERTIFIED SUSTAINABLE BEEF FRAMEWORK COMMITTEE

MANDATE: TO OVERSEE THE DELIVERY OF THE CANADIAN ROUNDTABLE FOR SUSTAINABLE BEEF (CRSB)'S CERTIFIED SUSTAINABLE BEEF FRAMEWORK.

This year, the CRSB established a Certified Sustainable Beef Framework Committee to oversee the delivery of the newly launched Framework. The committee's responsibilities include:

- reviewing and resolving complaints, appeals and real or perceived conflicts of interest;
- reviewing and responding to Standard and Chain of Custody requirements' interpretation, revision and exception requests;
- reviewing Certification Body and equivalency assessments; and
- identifying opportunities for improvement in the Framework's implementation.



Photo courtesy of Canada Beef

The Framework is **the first of its kind in the world**, and we are very proud of that in Canada. The CRSB is committed to continual improvement, and as we move from the development phase into implementation, there will be opportunities to make refinements. This committee is responsible for overseeing implementation and delivery, and I am looking forward to the meaningful committee discussions that will help make this Framework **a long-term success for all involved.**

GREG BOWIE
Co-Chair

This committee has a **well-rounded membership** representing a variety of different perspectives. We meet on a monthly basis, when we learn something new and discuss a path forward. We encourage organizations and individuals to send us their feedback so that we can ensure the Framework is achieving the mission of **driving the advancement and recognition of beef sustainability in Canada.**

TIM HARDMAN
Co-Chair



2018 KEY HIGHLIGHT

Established a Certified Sustainable Beef Framework Committee

Other 2018 highlights included:

- Completion of first consumer research project.
- Completion of the Certification Marks and Communications Claims and Labelling Guide.
- Addition of eight new members to the CRSB.
- Completion of baseline environmental inventories on 60,000 acres.
- Forward movement on sustainability projects pillar.
- Development of the funding model for the Certified Sustainable Beef Framework.



Regional Highlights Europe

European Roundtable for Beef Sustainability



The European Roundtable for Beef Sustainability (ERBS) is a multi-stakeholder platform focused on beef sustainability across the European region and across all aspects of the value chain, from farm to fork.

The ERBS consists of key players in the European beef industry, from producers through to retail. We welcome stakeholders from across the beef value chain who support the ERBS vision and mission and who strive to work constructively towards improving beef sustainability.

Our vision

We envision a world in which all aspects of the beef value chain are environmentally sound, socially responsible and economically viable.

Our journey began in 2011, when the SAI Platform Beef Working Group was established. Focusing at farm level, we initiated pre-competitive conversations on beef sustainability across the European industry.

Initially our focus concentrated on defining a set of 39 beef sustainability principles – from water quality to workers' rights. Through our continued learning and working together, we developed associated beef sustainability practices, to act as a guideline for the European beef industry.

In 2016 the beef sustainability principles and practices were used as a holistic framework to identify the four initial pan-European priorities on which to focus. These were identified through engagement with over 150 stakeholders across Europe. On the basis of this process our key priority action areas are: greenhouse gas emissions, animal health and welfare, animal medicines and farm management.

Our mission

All aspects of the beef value chain are recognised for delivering measurable positive impacts and continuous improvement towards key sustainability priorities.

We recognise that there is not a one-size-fits-all approach to beef sustainability in Europe: a region with very diverse production systems and climates. Delivering measurable progress on priority action areas at a country level, means securing the engagement and alignment of key national stakeholders through Country Platforms. By building on existing local initiatives and providing flexibility we are working together in a locally-relevant way.

The European Roundtable for Beef Sustainability **provides a catalyst for change**. Together we are establishing a common agenda and accelerating the delivery of meaningful sustainability progress across the beef value chain, whilst engaging and communicating with our diverse stakeholders.



1 - Greenhouse Gas Emissions

2 - Animal Health and Welfare

3 - Animal Medicines

4 - Farm Management



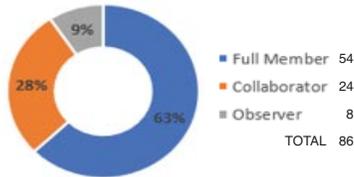


Regional Highlights south America

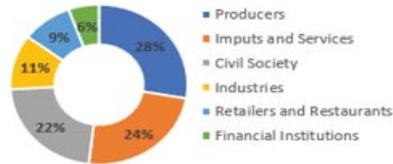


Brazil Grupo de Trabalho da Pecuária Sustentável

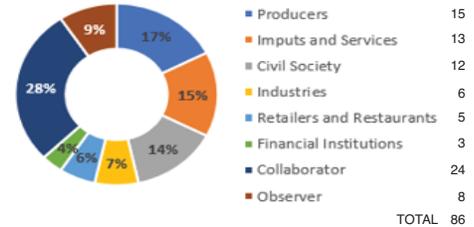
Type of Membership



Full Members - 6 Constituencies



Full Members + Collaborators and Observers



OUR MISSION

GTPS and all its members are committed to the **sustainable livestock development** through **value chain** articulation, **dissemination of information** and support for **continuous improvement**, seeking a balance between the economic, social and environmental pillars.

REPRESENTATIVENESS

Producers
Farmers from **ALL STATES** of Brazil

Meatpackers
73% OF SLAUGHTERINGS
92% OF EXPORTS
by volume of beef

Inputs and Services
70% OF BR MARKET
represented in the roundtable

Financial Institutions
+ US\$ 47 BILLION
rural credit in 2016

Civil Society
13 NGO's that act with socio-environmental responsibility in the main commodity chains in the world

Retailers and Restaurants
+ 2 MILLION
of people attended every day

IMPLEMENTATION OF SUSTAINABILITY INDICATORS IN LIVESTOCK



— GUIDE OF —
INDICATOR FOR SUSTAINABLE LIVESTOCK

GTPS WWF / CFA PROJECT

Platform development

Multipliers training

Engagement

Dissemination

DEVELOPMENT OF THE GIPS PLATFORM

Web
www.gips.org.br

App
Google Play or App Store

Support
Reference material for consultation and guidelines to fill out the GIPS

Benchmark
GIPS | GRSB | RAS | BPA
[Access the comparative infographic](#)



Regional Highlights South America

Mesa Argentina de Carne Sustentable (MACS)

In 2017 the local and international context favored the opportunity to bring together stakeholders across Argentina's beef value chain and to create Argentina's Roundtable for Sustainable Beef (Mesa Argentina de Carne Sustentable – MACS). In 2018, after three years of the restrictive trade regulations removal, Argentina will export around 500 thousand tons (ECW), which implies an approximate growth of 150% compared to 2015. To continue with the challenge of increasing exports, local exporters are enthusiastic about the opening of new markets (China and US), and are negotiating the entry conditions (tariffs and quotas). In addition, there is a new international framework aimed at ensuring responsible beef consumption, what represents new scenarios for large companies, global and local brands, and producers and the need to include new guidelines on sustainability in their practices.



The Argentina's Roundtable for Sustainable Beef (MACS) is made up of more than 50 organizations from different sectors across the beef value chain.

Given that Argentina is traditionally a livestock producer country, over the years many tools and guidelines have been developed, as well as regulations in terms of forest protection, land management, good livestock management practices, health and animal welfare, a national sanitary registry of agricultural producers, among others. In regards forest protection, Argentina has a National Law 26.331 "Territorial Management of Native Forests (2007)", the formation of the National Fund for the Enrichment and Conservation of Native Forests, which aims to compensate the jurisdictions that conserve native forests, environmental services that these provide, and the National Plan of Forest Management with Integrated Livestock (MBGI) launched in 2015 that proposes the use of forest in an integrated way.

MACS Principles:

- Natural Resources (deforestation, conversion, vegetation cover management, GHG, balance, soil management, water use)
- People & the Community (compliance with laws on working conditions, prevention of forced and compulsory labor, health and safety, child labor and child protection, community engagement, right to collective bargaining, cultural legacy, respect of the traditional land owners)
- Animal Health & Welfare (responsible use of pharmaceuticals, minimize pain, injuries, stress and diseases, sanitary management)
- Food (food safety, beef quality, information-shared along the chain)
- Efficiency & Innovation (efficient use of natural resources, implementation of production process technology, waste management, implementation of sustainability innovation processes / training and education)

Animal welfare

The Argentinean producer strives to improve its production day by day through the optimization of sanitary management, the introduction of pastures and the conservation of hay and grains and the incorporation of genetics to obtain the maximum production of meat per hectare. In recent years, it has begun to incorporate good practices in the management of the cattle to guarantee the quality of the meat it produces.

Increasingly, Argentina has begun to implement good management practices with its livestock. The existence of a robust legal framework and the support of government agencies (INTA and SENASA), universities, non-governmental organizations and recognized professionals have favored the development of public and private initiatives for Animal Welfare in the production, transport and slaughter of the animal. In recent years, manuals and technical guides have been developed and disseminated to producers. The challenge in this matter is to attract the interest of more producers in animal health and welfare practices and to achieve a wider implementation of good practices of cattle transport.

Cattle Ranching Good Practices

The National Forest Management Plan with Integrated Livestock (MBGI) proposes the use of the forest in a comprehensive manner that serves as an alternative for sustainable development in the face of changes in land use. Its objective is to achieve a profitable production of meat and wood and non-timber products, in a manner compatible with the conservation of the native forest, its biodiversity and its ecosystem services, within a framework of environmental, economic and social sustainability.

Challenges for the MACS:

- Achieve the articulation of the tools developed by governmental, non-governmental and private organizations.
- Define inclusive indicators for the entire territory.
- Increase the number of members throughout the country (greater representativeness).
- Raise awareness locally about responsible consumption.



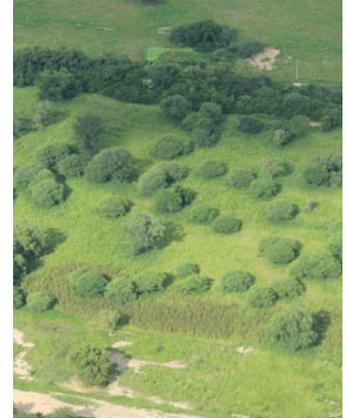
Regional Highlights south America

Mesa Paraguaya de Carne Sostenible



MPCS impacts and facts on the Paraguayan beef value chain

- Established in October 2017.
- Constituted by leading representatives across the beef value chain: producers, NGOs, restaurants, supermarkets, processing companies, and product & services companies. Also, government agencies and cooperation organizations are observing members of the MPCS.
- The MPCS defined sustainable beef as a socially responsible, environmentally sound and economically viable product.
- The MPCS formalized its governance system, statutes and internal regulations.
- There are three Committees actively working on Legal, Technical and Communications issues.
- Principle 1 "Natural Resources" and its criteria were stated in consensus among the members of the Technical Committee.
- Within a short time, a platform for fostering multi-stakeholder dialogue about sustainability issues on the beef production has been settled. The MPCS is the place where Paraguayan beef actors coordinate efforts and agree on the actions to be taken.
- A general working framework has been shared with producers.
- The MPCS is working on the development of sustainability criteria for the Paraguayan Chaco Region, an environmentally sensitive area in the country.



MPCS Priorities

- Position Paraguayan meat as environmentally sound, socially responsible and economically viable product.
- Identify local companies that have sustainability values.
- Achieve MPCS's recognition in the beef sustainability sector.
- Communicate and promote MPCS's values to Paraguayan society and throughout the beef value chain.
- Attend and participate in beef sustainability events.

MPCS Values

- Relevance: The MPCS must ensure that its work is significant to its members, other international organizations working on similar issues, and sectors related to Paraguayan beef market.
- Impact: MPCS's main goal is to encourage, support and demonstrate positive and tangible progress by adopting sustainability practices.
- Influence: The MPCS seeks to be a recognized organization among its members, other international organizations and the general public.
- Transparency: The MPCS must ensure transparency.

MPCS initial agreement to promote sustainability throughout the entire beef value chain:

- The MPCS recognizes that current laws in force are adequate to meet sustainable beef production criteria.
- In the case of the Paraguayan Chaco, 25% of the legal forest reserve must be preserved, which in the future would represent approximately 45% native forest, 35% implanted pastures and 20% natural fields.
- The MPCS promotes equal participation of the actors currently represented in the roundtable. However, it is necessary to achieve the participation of consumer representative organizations (NGOs).
- The MPCS aims for consensus as the main instance to reach agreements.
- If any differences of criteria, opinions or proposals arise, members commit to firstly discuss them within the MPCS.
- MPCS's position statements will be raised and discussed at the roundtable.
- The MPCS promotes good practices within Paraguayan beef value chain to enable sustainability continuous improvement.
- MPCS promotes public institutional strengthening.



Regional Highlights South America

Mesa de Ganadería Sostenible Colombia



Colombia is in the northern part of South America. There are two coasts: one with the Pacific Ocean and another with the Caribbean Sea. Neighboring countries are Panama, Venezuela, Brasil, Peru and Ecuador.



Human population: nearly 50 million people.



Cattle population: 26.3 million, the fourth largest in Latin-America and the tenth around the world.



Beef consumption: 18kg per capita.

National politics for beef and dairy production are growing and building, in large part due to the efforts of Mesa de Ganadería Sostenible Colombia (MGSC) and associated members. The roundtable is public-private, with 44 members. The national Agricultural Department and the national Environmental Department are viewed as leaders within the group, with other important members such as WWF and TNC.

Colombia is the first country to have a National Action for Appropriate Mitigation for cattle production. The working group has made it possible to identify different financial sources to develop beef production: private banking, national and international cooperation, and public resources.

For several years Colombia has been preparing the country's beef production system, the law system and future generations for sustainable production. Non-Governmental Organization's have been helping local producers and public institutions build up better agricultural policies. The Colombian government subscribed a Pact for Zero Deforestation with a year 2020 deadline. The idea is to give support for local producers, which will lead to sustainable beef and dairy production.

The local Project for Sustainable Beef production received help from international cooperation and introduced sustainable production practices, which impacted the following:

- 4,000 producers.
- More than 12 states.
- 87 municipalities.
- Planting of 2.5 million trees, in 24,000 hectares.





SUSTAINABLE BEEF STORY

New Zealand has a proud history of pastoral farming built around extensive low impact grassland grazing systems for sheep and cattle. This legacy is standing farmers in good stead as the world searches for sustainably produced, nutritious food.

All the partners in the chain from farmers and growers through to processors and markets know that future farming depends on looking after all aspects of sustainability – environmental, social and economic and the ways they interact and influence each other.

The unique combination of climate, soils and landforms, from sub-tropical north to cool temperate south, from wide plains to rolling hills and on to mountainous high country require different farming mixes. Farmers mix and match to suit the land and the climate, some with ample rain to feed almost year round grass growth to others who focus on dry-land, seasonal systems with specialist feed crops to provide a good diet for animals year round. Farm products get mixed and matched too. Farms mix sheep and cattle, crops, vegetables, trees or bees in ways that complement each other, look after the environment and provide a livelihood for the farmers and those who process the products and get them ready for consumers worldwide.

New Zealand farmers know that they are dependent on the environment for their livelihood and take great pride in looking after it well. Whether its protecting wetlands and native forests, looking after soil health and water quality, animal welfare, reducing emissions or minimising waste. All this makes New Zealand a bit different to the rest of the world, so that some of the rules and measures from other countries just don't work here. So instead there are measures of the things that are important and often unique to New Zealand.

Farms are a bit of a generational thing in New Zealand. Family farms are still the most common form of ownership, but regardless of who owns them, the people on the land are passionate about what they do.

Beef + Lamb New Zealand, the industry good organisation launched its new environment strategy in 2018, focussing on carbon neutrality by 2050, catchment based water improvement programmes, thriving biodiversity and healthy productive soils.

www.beeflambnz.com/environment-strategy

Stewardship

24% or 2.5 million ha of New Zealand's native biodiversity is found on sheep and beef farms



Water

90% of New Zealand beef's average water use is green water, and just 0.05% is blue water



Climate Change

Beef and sheep farms have reduced their GHG emissions by 30% over 1990 levels



Animal Health and Welfare



The Five Freedoms are enshrined in legislation



1st equal on the Animal Protection Index

People

He tangata, he tangata, he tangata



95%

It is the people, it is the people, it is the people

Most farms are family owned and operated





Regional Highlights Southern Africa

Southern Africa Regional Roundtable for Sustainable Beef



The Southern Africa Regional Roundtable for Sustainable Beef was launched in Malawi in Mangochi District, on 6th to 7th February 2018 with the following countries, Malawi, Zambia, Swaziland, Namibia, Mozambique, South Africa and Zimbabwe. Its main objective is to have a unified body that will help in the decision making processes of the beef sector of all participating member states. The platform acts as a decision making body comprised of stakeholders who perceive the same resource management problem, realize their interdependence in solutions, and come together to agree on action strategies. Partners in the sector will share experiences, lessons and challenges leading to collective solutions.

Specifically, the platform shall

- Bring together and coordinate multi-stakeholder actors and interests.
- Advocate for greater recognition and investments (policies).
- Assist stakeholders to avoid replication of activities along the value chain.

Regional Focal Areas

Animal Health – Disease outbreaks are common in the region due to poor management or wildlife interaction with cattle.

Information – Access to current information on production and marketing is scanty leading to low productivity. The industry is seeing the development of APPS to allow farmers get the needed information for farming.

Marketing – Mainly run by traders who buy animals in the rural areas and sell to the urban areas.

Value Chain Financing – Lack of financing has hindered the development of the industry, when available it is expensive.

Where are we to date?

In Mangochi an interim board was put in place to start and run the roundtable activities. It saw the start of programs in the 7 countries. The programs are at different levels and all have a group or board to run the in-country affairs. Stakeholders are being identified and talks are ongoing to recruit more in-country members along the value chain.

A new board was voted into office with a two year mandate, and the following committees have been formed to facilitate the running of the board:

1. Finance and Resource Mobilization
2. Administration and Communication
3. Technical

It has been noted that there is a strong need for consumer awareness on the importance and benefits of eating sustainably produced beef.



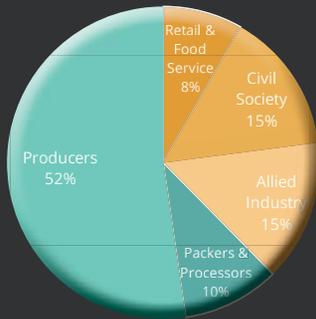


2018



111 MEMBERS

Today, the U.S. Roundtable for Sustainable Beef is comprised of more than one hundred member organizations who share our vision in continuously improving the sustainability of U.S. beef. This diverse set of members is representative of all segments of the beef value chain.



Members are actively involved in working groups **84%**
262 Individuals engaged in the efforts of the USRSB
 Members are satisfied with the work of the USRSB **81%**

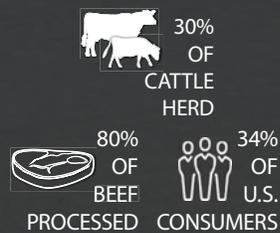
25% Increase in Revenues
86% Member Retention Rate
15% Membership Growth

A YEAR IN REVIEW

10

Field and pilot projects that support the USRSB Framework

USRSB members represent roughly 30% of the cattle herd, more than 20 billion pounds of beef processed and nearly 100 million beef consumers across the U.S.



129,759 Impressions on Social Media

Followers on Twitter @USRSBeef **430**
 VISITS: +117%
 MENTIONS: +368%
 FOLLOWERS: +154%
 +2,444% TOTAL IMPRESSIONS
 +117% SOCIAL MEDIA PRESENCE

>27 Outreach and education events USRSB materials were presented

3,852 USRSB Booth Visitors
2018 Cattle Industry Convention

USRSB Sustainability Framework

In the last year, the USRSB worked to develop a full set of resources the beef value chain can use to assess their individual sustainability efforts through the USRSB Sustainability Framework. This Framework is comprised of three key elements: High-Priority Indicators, Sustainability Metrics, and Sustainability Assessment Guides (SAGs).

Moving into 2019, the USRSB is working to finalize the Sustainability Framework, develop self assessment tools, commence a program evaluation process and program, and develop public facing materials for outreach and implementation of the final Framework.

To learn more about the Framework and efforts of the USRSB, please visit www.USRSB.org.

FRAMEWORK Development

465 USRSB Framework comments received during Public Comment
5 ROUNDS
>1,250 Internal comments received on the USRSB Framework

700 Internal comments on Metrics
350 Internal comments on SAGs
SIX High-Priority Indicators
51 Metrics to support the Indicators
21 Sustainability Assessment Guides

GLOBAL CONFERENCE ON **SUSTAINABLE BEEF**



BUILDING ON EXPERIENCE: Regionally and Globally
October 4-7, 2016

The 2016 Global Conference on Sustainable Beef was held October 4-7, 2016 at the Fairmont Banff Springs Hotel in Banff, Alberta, Canada. GRSB and The Canadian Roundtable for Sustainable Beef co-hosted the event.

Making the beef value chain more sustainable is a journey of continuous improvement. The Global Conference on Sustainable Beef brought together the world's leading beef producers, environmental organizations, beef processors, retailers and many other key stakeholders to share work being done on enhancing the sustainability of all segments of the beef value chain. In addition, the exciting work of the Regional Roundtables was showcased and shared.

To view conference materials and presentation videos visit: <https://grsbeef.org/2016-GCSB-Proceedings>



SSS Red Angus offered tour attendees a look into Red Angus genetics.



Tour attendees enjoyed pancakes served by the Calgary Stampede Committee.



The 2016 GCSB brought together more than 200 sustainability advocates.



SUSTAINABILITY COMMUNICATORS SUMMIT

OCTOBER 11-13, 2017

The inaugural GRSB Sustainability Communicators Summit was held October 11-13, 2017 in Denver, with more than 70 delegates from 7 different countries in attendance. Corporate communicators, beef producers, agriculture influencers, cattle association staff, media, sustainability experts, researchers and more attended the collaborative event which identified six key opportunities for sustainability communicators to amplify in their efforts:

Opportunity 1

-Focus on shared VALUES.

Sustainability communication is not a debate. It's a dialogue that should start from common values and should avoid message dumping.

There is no one shared definition of sustainability across all audience but we all share VALUES, and when looking to build new relationships with new tribes, values are the fastest connector.

Opportunity 2

-Know your ideal audience. "Consumers" and "producers" are too broad of categories. You can have multiple audiences, but not all messages will resonate with each.

Listen to what each audience wants to know and remember it's not about "educating" them. It's about engaging them.

Tell the right story, in the right way, at the right time. In the right tone, with the right language.

Opportunity 3

-Begin with the end in mind. Know where you're headed with your communication efforts. What does measurable engagement look like on social media and beyond?

Benchmark. Set goals.

Move deeper than impressions.

Opportunity 4

-Leverage partnerships beyond typical boundaries and collaborate more effectively.

Example: Create an accessible place where vetted sustainability content and educational resources can be shared and re-purposed.

- Documentaries & Videos
- Studies, Facts, Science, Research
- Authentic Stories of Sustainability
- Communications Expertise

Opportunity 5

-We all need to ask better questions (of everyone...consumers, producers, partners, etc.).

Example: Instead of asking producers how they are sustainable, ask them how they're improving things like water and grazing lands. Most producers use a variety of sustainable practices, but just think of them as good management.

Opportunity 6

-Show progress, not perfection.

Don't over-glorify results and show how things are improving over time.

Demonstrate progress toward sustainability goals around water, climate, animal welfare, team member health and safety, and integrity.

• Posts about #GRSBcomm:

-Dr. Kevin Folta blog: <http://kfolta.blogspot.com/2017/10/rethinking-communication-ranchers-beef.html>

-Ag Web: <https://www.agweb.com/article/how-to-best-communicate-sustainability/>

-Progressive Cattle: <https://www.progressivecattle.com/news/event-coverage/8090-ranchers-must-clear-the-air-of-production-falsehoods>

-Progressive Cattle: <https://www.progressivecattle.com/blogs/from-the-editor/8056-trail-rides-communicator-summit-delves-into-sustainability-of-beef>

-Working Ranch Radio: <https://workingranchradio.podbean.com/e/episode-52-sustainable-beef-learning-the-law-and-a-new-club/>



GLOBAL ROUNDTABLE FOR[®]
SUSTAINABLE BEEF

Statement on Antimicrobial Stewardship

In August 2018 we released our Antimicrobial Stewardship Statement following its overwhelming approval by our membership. The reasons for issuing such a statement are quite simple; we see the use of antimicrobials as being of primary importance to the sector, and need to ensure that we can continue to use antimicrobials effectively in the future.

The use of antimicrobials in livestock is regularly blamed for increasing levels of resistant bacteria and for a rise in infections with them in the human population. Given that use of antimicrobials selects for resistance, we should not be surprised that the problem increases as antimicrobials are used more widely. Due to the fact that there are and have been no new antimicrobials over the last decades, we can also see why resistance is becoming an increasing risk to human and animal health.

Can antimicrobial use in cattle contribute to resistant bacterial infections in humans? If use in cattle creates resistant bacteria, but only amongst cattle, that would be an issue for the producer in terms of animal health, well-being and economics, but not a threat to humans. However, we do know that when resistance to a class of antimicrobials develops in bacteria, those resistance genes can spread not only in that strain of bacteria, but also to other strains in the environment, and if the same drug is then used for humans, that resistance can render those drugs ineffective.

There are also scenarios in which humans can be infected directly with resistant bacteria from livestock. This is why the WHO list of antimicrobials of critical importance to human health is relevant even to livestock producers – clearly we want to be able to continue to use antimicrobials effectively in livestock, without causing any risks to human health.

Fortunately for cattle producers, there are not a large number of drugs that are central to cattle health that are of critical importance to human health. Macrolides, however, are definitely an example of a class of drug that are critical to both human and animal health, and we can expect increasing attention on their use in livestock in the future. This makes research into prevention and treatment of shipping fever (BRD) a major priority, as macrolides are the drug of choice at the moment.

This antimicrobial statement forms a useful part of a stewardship framework for countries where there is still little control of the use of antimicrobials, as well as being a positive signal of the value we share with consumers in countries where controls are already well established.

GRSB Statement on Antimicrobial Stewardship: <https://grsbeef.org/resources/Documents/AntimicrobialStewardship/GRSBAntimicrobialStewardship-FINAL.pdf>

Antimicrobial Statement FAQs:

<https://grsbeef.org/resources/Documents/AntimicrobialStewardship/GRSB%20Antimicrobial%20Statement%20FAQs.pdf>



GRSB Statement on Antimicrobial Stewardship

(Adopted by GRSB Membership 13 June 2018)

(These guidelines are in line with OIE guidance and equivalents adopted in other countries for antimicrobial use in cattle. They are not intended to duplicate or replace national or local legislation or regulations. Implementation will always be subject to local and national legislation or regulations.)

The following suggestions aid cattle producers and the veterinary profession in their responsibility for maintaining herd health and welfare as well as economic viability. They also support public health and benefit consumers. Members of GRSB recognize the importance of maintaining the efficacy of antibiotics for human and animal health, and therefore seek to minimize the development of antimicrobial resistance.

Sustainable beef producers, veterinary profession and value chain partners work together to:

- Establish a herd health plan and valid veterinary client-patient-relationship (VCPR) with a veterinarian¹, including applicable preventative measures to refine, reduce and where possible replace the use of antimicrobials. Review health plan periodically;
- Prioritize the welfare of animals within the confines of a valid VCPR, focusing on good animal husbandry and vaccinations to prevent common infectious diseases. Treat as few animals as possible when required, but as many as necessary for effective disease control;
- Ensure those administering antimicrobials are appropriately trained and competent in correctly following prescription and label instructions;
- Ensure legal compliance in administration of antimicrobials with drug indication, dose, route, frequency, duration, withdrawal period, and storage, as per prescriptions/label directions and health protocols from a veterinarian;
- Dispose of all expired antimicrobials safely in accordance with relevant regulations;
- Keep treatment records that include the date, disease diagnosis, antimicrobial product name, dosage, route of administration, treatment outcomes when attainable, and any pertinent diagnostic test results;
- Adopt a tiered approach to antimicrobial use: use effective antimicrobials of the lowest importance in human medicine as the first choice and those of highest importance in human medicine as the last choice, provided doing so does not delay effective treatment or compromise animal health and welfare;
- Not use licensed antimicrobials that are in the specific country's highest category of importance in human medicine² and the WHO list of highest priority critically important antimicrobials for human medicine, unless no other antimicrobials licensed for use in cattle would achieve the desired animal health, welfare and food safety outcomes; and
- Not use any antimicrobials other than ionophores to improve feed efficiency.

¹ or qualified animal health provider (e.g. paravet) in low and middle income countries with limited veterinary infrastructure

² WHO: <http://apps.who.int/iris/bitstream/10665/255027/1/9789241512220-eng.pdf?ua=1>



Joint Working Group on Forests

The GRSB-GTPS Joint Working Group on Forests (JWG) is a technical working group of the Global Roundtable for Sustainable Beef (GRSB) and the Brazilian Roundtable on Sustainable Livestock (GTPS).

The JWG was formed in collaboration with the Consumer Goods Forum (CGF), to explore the challenges and opportunities associated with deforestation-free production and sourcing of cattle products. Since its creation in 2012, the JWG has provided a forum for stakeholders from across the cattle value chain to advance solutions that help eliminate deforestation from cattle production systems and contribute to the sustainability of the sector.

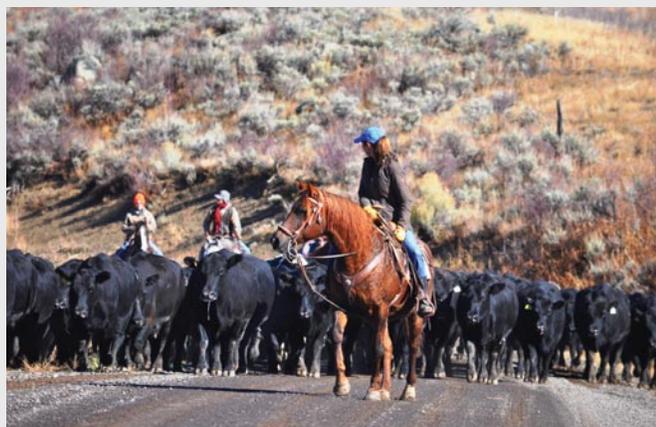
Objectives of the JWG:

- Enhance understanding of the conditions under which cattle contribute to deforestation.
- Facilitate engagement and collaboration among diverse value chain stakeholders to explore technical and policy-relevant opportunities and challenges associated with deforestation-free production and sourcing.
- Support efforts aimed at developing, strengthening and implementing commitments to deforestation-free production and sourcing.

The JWG is dedicated to providing an open forum for engagement and collaboration among all relevant stakeholders. Therefore, participation in the JWG does not imply agreement and/or commitment with any particular viewpoint or policy position.

Membership:

The JWG is a multi-stakeholder group, led by the National Wildlife Federation (NWF), with strategic and operational support from the Leadership Committee. The JWG is made up of an internationally diverse group of stakeholders, with general membership spanning over 80 companies and organizations, representing all the major roundtable constituency groups: producers, commerce and processing, retail, civil society, and regional roundtables.



Membership in the GRSB and GTPS is highly recommended, but it is not required for participation in the JWG.

2017-2020 strategic priorities:

- Help support the advancement of deforestation-free production and sourcing of cattle and cattle products.
- Expand geographic scope (beyond Brazilian Amazon) to include other key forest-risk regions, such as the Cerrado and the Gran Chaco.
- Help support the development of new sustainable cattle roundtables in Argentina and Paraguay (and potentially other countries/regions).

2018:

In the lead-up to the bi-annual Global Conference on Sustainable Beef (in Kilkenny, Ireland, 9-12 October, 2018), the JWG hosted a two-part webinar series focused on practical solutions to meet the challenges associated with bringing deforestation-free production and sourcing to the mainstream across Latin America.

The first webinar focused on the perspective from key stakeholders from Latin America, and the second webinar featured international perspectives from the United States, European Union and Asia.

The first webinar “Advancing deforestation-free – South America Perspective” had three presentations:

- GTPS – The role of roundtables in driving these discussions;
- TNC – Innovative ideas on deforestation-free financing;
- Walmart Brazil – The experience of a deforestation-free procurement system.

The main lessons, according to participants and speakers were:

Roundtables play a critical role in bringing together all stakeholders to find solutions for common problems and needs;

There are a multitude of innovative ways to finance a deforestation-free/sustainable cattle ranch, such as the new model TNC designed to Pará - Brazil, but in all of the ways technical assistance along with credit is a key factor of success;

Implementing a monitoring system of deforestation-free purchase is not easy, demands lots of efforts, time, and work in partnership with other stakeholders, but it is possible. The next step here is to find ways to monitor indirect cattle suppliers.

For more information visit
https://grsbeef.org/JWGF-News_Reports



Metrics and Reporting

Metrics

In order to show progress over time, it is important that we have an understanding of where the beef industry is today, so we can assess the ways GRSB and our members are having a positive impact. CANfax has been assisting our metrics group to report on a range of metrics that are globally relevant.

Reporting

As the number of national roundtables and initiatives increases it is vital that we track their progress to demonstrate continuous improvement.

To this end we have created a draft reporting framework that is being piloted now with four of our roundtable members. It contains sections to capture how the roundtables are contributing to the principles and criteria and, where available, evidence of impact. The intention of the reporting system is not to compare countries with each other, but rather to track our collective progress over time to monitor continuous improvement.





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