

ANIMAL HEALTH & WELFARE

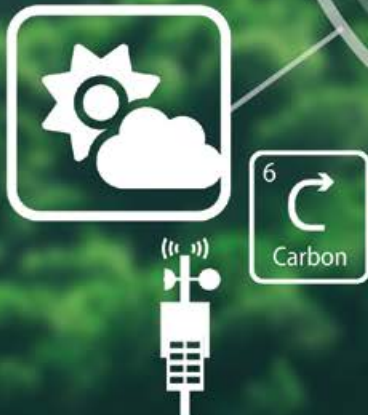


2023 ANNUAL REPORT



GLOBAL ROUNDTABLE FOR[®]
SUSTAINABLE BEEF

CLIMATE



NATURE POSITIVE PRODUCTION

WHO WE ARE

The Global Roundtable for Sustainable Beef (GRSB) is a global, multi-stakeholder initiative that has been advancing sustainability of the global beef value chain through leadership, science and multistakeholder engagement and collaboration.

For more than 10 years, this organization has been continuously cultivating partnerships and establishing broadened channels of communication across the globe. Some of the partnerships include The Context Network, SureHarvest, and Emerging Ag. Together, with these partnerships, we've been able to reach more people, communicate our message and goals more clearly, and begin recording the impactful data we have to show how we're making a difference in beef sustainability. GRSB has made great strides in growing awareness of the core principles of sustainable beef — natural resources, people and community, animal health and welfare, food and efficiency and innovation.

Through global conferences, webinars, as well as speaking and publishing opportunities, GRSB has influenced change via educational and informational advancement for this industry. In ten years, GRSB has established a membership base of forward-thinking businesses and individuals who are working toward a more global sustainable beef supply chain. The GRSB consists of 110 members in seven constituencies: producer, processing sector, allied services & industries, retail companies, civil society, consulting, and national or regional roundtables. GRSB includes a General Assembly of all members, a Board of Directors of 20 members and Executive Committee of seven members.

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Vision

We envision a world where beef is a trusted part of a thriving food system in which the beef value chain is environmentally sound, socially responsible, and economically viable.

Mission

The GRSB mission is to advance, support, and communicate continuous improvement in sustainability of the global beef value chain through leadership, science, and multi-stakeholder engagement and collaboration.





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Perspectives from the President and Executive Director

Last year we reflected on the progress made to release a set of Global Goals. This year we are excited to report on our progress in achieving these goals. This is a snapshot of the information available from our regional roundtables and members and demonstrates their progress, commitment, and dedication to reaching our targets.

Since setting our goals, we have worked with SureHarvest to develop a reporting framework and template to collect both quantitative and qualitative information from national roundtables, you will find a summary of this on pages 19 & 20. This project has captured the extensive work done over many years of some of our roundtables while encouraging an initial baselining effort by others. The ongoing efforts to measure continuous improvement will greatly increase the transparency and honesty with which we can communicate the incredible improvements being made around the globe.

Data collection and reporting shed light on areas where information is hard to get or where strategies for recording progress are not yet clearly defined. It is, for this reason, that we initiated the GRSB Sustainability Roadmap Fund; to support projects that develop common approaches to reporting on climate, biodiversity, and other goal-related areas. The climate roadmap should build on our existing beef Life Cycle Assessment (LCA) guidelines and the commitments our members have made on climate. Similarly, our nature-positive roadmap will help members identify the strategies they need to adopt to measure and report progress against their nature commitments. It is through this commonality in monitoring and reporting that we can provide clarity to everyone from farmers to consumers on what metrics matter and how to measure them.

To add to our existing three goals, a new working group was developed. This group is working on the development of a social impact goal and will be voted on by members in 2024. This will add an important dimension to our work in

recognizing the role that beef production, processing, and consumption plays in communities, and the positive steps that can be taken to ensure an inclusive and equitable industry. It is the people and cultures that make our industry such a vibrant and exciting place to work. This goal works to recognize that, and ensure everyone is safe, valued, and given equal opportunity as we provide vital nutrition to the world.

This year we welcomed Uruguay to GRSB; the Uruguayan National Roundtable was formed in September of 2023. It is built on the many years of work that has been undertaken by the National Meat Institute (INAC) and the Agricultural Research Institute (INIA) with beef producers and processors in the country on beef sustainability. We look forward to meeting many of the people involved, in person at our Global Conference on Sustainable Beef in Punta del Este, Uruguay in late September and early October 2024.

A handwritten signature in black ink, appearing to read 'Ian McConnel'.

Ian McConnel
*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*



GRSB SUSTAINABLE BEEF ROADMAP FUND

GRSB developed a Roadmap Fund with associated projects to progress the goals and deliver a concrete path forward for its members who have already made commitments.

GRSB's partnership with The Context Network involved interviewing a broad range of its members and other industry stakeholders from different continents to discuss their climate commitments and the actions they are taking to meet them. The insights collected are helping guide the direction of GRSB's work, providing members with alignment for similar climate reporting, and GRSB is positioned to bring consensus on how to achieve it.

There are four areas GRSB can play a role in:

- Representing stakeholders' voices
- Developing specific principles and criteria for reporting
- Standardizing datasets and inputs to them
- Providing resources and education to stakeholders (sharing the expertise of the entire network)

This provides us with guidance in the Climate sphere as to what the next phases of that Roadmap project should look like.

A very similar approach works for each of our goals working groups; just as members have been looking for solutions to reporting on climate commitments, so have they for Nature Positive Production. A roadmap for our Nature Positive Production goal could include defining the principles and criteria that apply to implementing and reporting on that goal, as well as collating the experiences of our entire network on how they are already working on it, and mapping incentives that help drive uptake.

For animal health and welfare, we need principles and criteria on the implementation and measurement of improvements. We need a clearer picture of the differences that exist between regions. Mapping initiatives and sharing learnings and experience, including understanding more about what the drivers or bottlenecks are to the adoption of better health and welfare practices, form the basis of the roadmap.

These Principles and Criteria are the concepts involved in measuring and reporting on progress. 2024 is the right time to review our Principles and Criteria for Sustainable Beef at the same time, to ensure that they are up to date and reflect today's realities.

For each of the goals working groups, the roadmap, so far, involves conducting a review of existing solutions and tools already in use, including financial opportunities, developing principles and criteria to guide measuring and reporting, and emphasizing actions that members can be taking immediately to make progress.

GRSB MEMBERSHIP

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 observing or consulting member also exists.

Of the general assembly, 19 members make up the Board of Directors; and seven positions constitute the executive committee, which consists of a president, vice president, secretary-treasurer, and three 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.



Executive Committee



President
Ian McConnel
Tyson Foods
Australia



Vice President
Bob Lowe
Tri-L Ranch
Canada



Secretary/Treasurer
Justin Sherrard
Rabobank
Netherlands



Member at Large
Lucas McKelvie
McDonald's Corporation
U.S.



Member at Large
Jeannette
Ferran Astorga
Zoetis
U.S.



Member at Large
Luiza Bruscato
Brazilian Roundtable for
Sustainable Livestock
Brazil



Immediate Past President
Bob McCan
McFaddin Enterprises
U.S.

Administrative Staff



Executive Director
Ruaraidh Petre



Regional Director Latin America
Josefina Eisele



Director of Administration and Finance
Scott Stuart



Director of Member Services and Business Development
Katie Ambrose



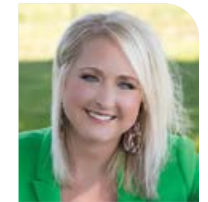
Office Administrator
Julie James



Accountant
Bill Stedman



Communications
Polly Welden



Communications Coordinator
Kellie Lasack

Board of Directors

PRODUCER CONSTITUENCY

- Meat & Livestock Australia
- Canadian Cattle Association
- National Cattlemen's Beef Association (US)
- Sol Dorado (UY)

PROCESSING CONSTITUENCY

- OSI Group, LLC
- Harvest Road
- Cargill

RETAIL CONSTITUENCY

- Restaurant Brands International (Burger King)
- McDonald's

CIVIL SOCIETY CONSTITUENCY

- National Wildlife Federation
- World Wildlife Fund
- Texas A&M, Dept. of Animal Science

ROUNDTABLE CONSTITUENCY

- MBCS – Mesa Boliviana de Carne Sostenible
- MPCS – Mesa Paraguaya de Carne Sostenible
- SARRSB – Southern Africa Region Roundtable for Sustainable Beef
- USRSB – U.S. Roundtable for Sustainable Beef

ALLIED SERVICES & INDUSTRIES CONSTITUENCY

- Textile Exchange
- Rabobank
- Corteva Agriscience

MEMBERSHIP

PRODUCER CONSTITUENCY



PROCESSING CONSTITUENCY



ALLIED SERVICES AND INDUSTRIES CONSTITUENCY



RETAIL CONSTITUENCY



CIVIL SOCIETY CONSTITUENCY



ROUNDTABLE CONSTITUENCY



CONSULTING MEMBERS



OBSERVING MEMBERS



BY THE NUMBERS

2023 Outreach Metrics

19 NEW GRSB MEMBERS

Website



Increase in page views



Increase on unique page views



Increase of average time on page



Speaking Opportunities



Apr. 19	U.S. Dairy Export Council, Argentina
May 3-4	Future of Food Innovation Forum, Netherlands
May 9-10	Informing New Zealand Beef, Beef Breeders Forum, New Zealand
Jul. 4	Australian Farm Institute, ESG Summit, Australia
Aug. 26-Sep. 1	EAAP Annual Meeting, France (recording)
Sep. 19	Deforestation-free cattle ranching in the Tropical Andes (Climate Week), USA (virtual)
Sep. 25-27	FAO Global Conference on Sustainable Livestock, Italy
Sep. 28-29	Environmental and Human Rights Due Diligence Workshop, Germany
Oct. 23-27	Committee on World Food Security, Italy
Oct. 30-Nov. 3	GASL Multi Stakeholder Partnership Meeting, Thailand
Oct. 8-13	Australian Beef Leaders, Australia
Nov. 14	Common Sense Sustainable Impact Summit, Indonesia
Nov. 30-Dec. 12	COP28, United Arab Emirates

Social Media Metrics



191.6% increase of impressions
(235,066)



18.4% increase of impressions
(197,216)



104.3% increase of impressions
(37,853)



767* interactions

* Due to the ownership and platform transition from Twitter to X, earlier this year, an accurate reflection is not obtainable at this time.

Blogs



NOV	Reducing Environmental Impact by Improving Animal Health
AUG	European Regulation and its Actual Effect on Deforestation
JUN	Carbon Tunnel Vision
APR	Regenerative Grazing and Its Range of Practices
MAR	Animal Health and Welfare: Pain Mitigation
FEB	Nutrition and Its Role in Sustainable Beef

Podcasts



TOPSOIL PODCAST:

May
Livestock Production and Sustainability at a Global Level with Guest Ruairaidh Petre



ASHCLOUD PODCAST:

March 2
Creating positive climate impact on the vast landmass under beef production with Ruairaidh Petre



CATTLE CHAT PODCAST:

November

Webinars



JAN:	Financing Beef Sustainability
FEB:	Setting Climate Targets
MAR:	Cattle Welfare
MAR:	Regenerative/Nature
MAY:	Manage Regulatory and Policy Issues
JUN:	EU Deforestation Regulation Pathways to Compliance for the Cattle Industry
AUG:	Cultivated Protein
AUG:	Incentives and Financing Mechanisms for Beef Sustainability
SEPT:	New Approaches to Tracking Claimability and Traceability
OCT:	Human Rights Due Diligence
DEC:	Challenges on Adopting Animal Welfare Practices

CONFERENCES

GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF[®] 2022 COMMUNICATORS SUMMIT

2022 Communicators Summit in Denver, Colorado. They discussed how to transition from telling your story to a wider view of overall industry engagement with social change and values, and knowing when telling your story is the right tool and for what audience.

There was also a panel discussion with three sustainable beef experts that provided information and different perspectives on how we can communicate better with our consumers.

Brad Witt and
Taylah Faulkner,
The University
of Queensland,
opened up the

GLOBAL CONFERENCE ON SUSTAINABLE BEEF[®] REACHING NEW HEIGHTS: Achieving Global Goals

Global Goals was in Denver, Colorado, U.S. at the Hilton Denver City Center, November 7-10, 2022.

Attendees heard from influential leaders in sustainable beef, such as; Jason Weller, JBS Global Chief Sustainability Officer; Peter Byck, Professor at Arizona State University and Film Producer; Juan Jose Monlina, Zootechnician, Veterinarian, El Hatico Nature Reserve; and Gina Gigot, Thunderstruck Farms.

The common themes that came out of the conference included the need for investment, collaboration, data sharing, and the urgency of action both in sustainability improvements on the ground and in communication.

The 2022 Global
Conference on
Sustainable Beef
Reaching New
Heights: Achieving



CONFERENCES continued



INNOVATION TOUR: CARIBBEAN REGION OF COLUMBIA

March 27-31, 2023 | Cartagena & Monteria

the Caribbean coast to learn about the livestock landscapes typical of the Tropical Dry Forest ecosystem. It demonstrated the advances, difficulties, and challenges of sustainably transforming livestock production systems for the well-being of farmers and rural communities under a territorial approach.

The number of attendees demonstrated a deep interest in the livestock world for events such as these. There were 98 people from 18 different countries at the symposium, with a large presence of local stakeholders, as well.

“Sustainable Livestock: Link Between Carbon Sequestration and Biodiversity”

On March 27-31, 2023, GRSB international members from around the country toured the border of

SUSTAINABILITY COMMUNICATORS SUMMIT

October 2-4, 2023

GRSB Sustainability Communicators Summit was hosted in San Diego, California on October 2-4, 2023 at the Rancho Bernardo Inn.

GRSB members from across the world joined in discussions on how they can better communicate their sustainability efforts, what obstacles they're facing, and discovered some ways they could all learn from each other. It was an incredible few days and we're grateful for everyone that was able to attend.

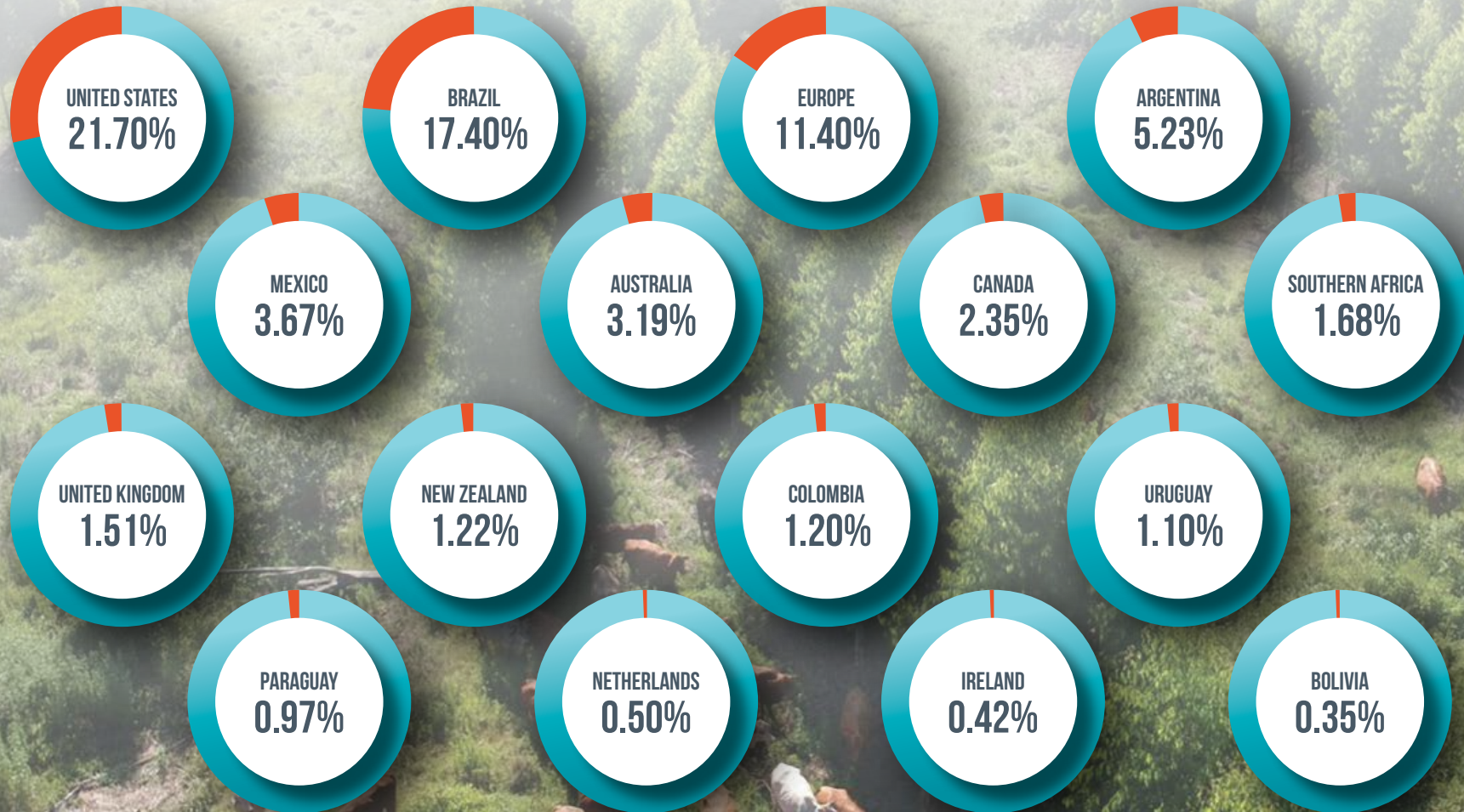


SUSTAINABLE BEEF MILESTONES



WORLD BEEF PRODUCTION

BY GRSB MEMBERSHIP



GRSB CLIMATE WORKING GROUP



GOAL: GRSB aims to globally reduce by 30% the net global warming impact of each unit of beef by 2030, on a pathway to climate neutrality.

Carbon Scoping Project

As the Science Based Targets Initiative (SBTi) and Greenhouse Gas (GHG) Protocol have gained international recognition, there remain several unanswered questions for individual corporate members (e.g., processors, retailers, banks, etc.) in reporting against their climate goals. Uncertainties for producer members exist around how they should demonstrate the action they are taking to reduce emissions, so they can receive appropriate recognition and reward for these actions. This year, GRSB worked with The Context Network to survey a diverse group of stakeholders and members with the goal of providing clarification to GRSB members regarding measuring, tracking and reporting climate goals, specifically GHGs. This included mapping GRSB stakeholders across the global beef value chain and developing an understanding of the interests and needs regarding measuring and tracking GHG emissions. During the 2023 Communicators Summit, The Context Network held an in-person workshop to help us further understand the needs for this project and to produce a report with future recommendations.

Informing on Goals Progress

Over the past year, the Climate Working Group has invited speakers to present on topics relevant to the Climate Goal. The working group heard from experts with the UN Food and Agricultural Organization (FAO) on their Global Livestock Environmental Assessment Model (GLEAM). This model has been determined the best first step for developing benchmark measurements for the climate goal, with a base year of 2015 and global emissions intensity of 47.35 kg CO₂-equivalents per kg of beef. The Climate Working group will continue to work with the FAO and our national roundtables to acquire more accurate information to support continued improvements in accuracy of GLEAM.



continued on next page

GRSB CLIMATE WORKING GROUP continued

Next Steps

The GRSB Climate Working Group will continue to bring in different speakers to their bi-monthly meetings to learn from what groups are doing in other parts of the world. As goals measuring and monitoring takes place, a shift toward identifying and communicating mitigation strategies appropriate to each region is needed. Work plans, communication and extension must ramp up in the coming years to achieve the ambitious goals set. We will also work alongside the other GRSB working groups to determine opportunities for collaboration.



FAO Region

Australia and New Zealand	Eastern Europe	Northern Europe	Southern Asia
Caribbean	Melanesia	Polynesia	Southern Europe
Central America	Micronesia	South America	Western Africa
Central Asia	Middle Africa	South-Eastern Asia	Western Asia
Eastern Africa	Northern Africa	Southern Africa	Western Europe
Eastern Asia	Northern America		

--- Disputed International Boundary

Source: United National Geospatial, 2020. Map of the World. United Nations. Cited August 2022.
www.un.org/geospatial/file/3420/download?token=TUP4yDmF

FAO Region	Animal	Emission Source	Production [t]	Emissions [t CO ₂ eq]	Emission Intensity [kg CO ₂ eq / kg]
World	Cattle	Total	39,380,286	1,864,699,822	47.35
Australia and New Zealand	Cattle	Total	1,886,631	47,128,252	24.98
Caribbean	Cattle	Total	152,925	10,946,771	71.58
Central America	Cattle	Total	1,581,831	106,539,716	67.35
Central Asia	Cattle	Total	133,155	4,880,516	36.65
Eastern Africa	Cattle	Total	602,520	58,041,487	96.33
Eastern Asia	Cattle	Total	3,373,053	116,335,257	34.49
Eastern Europe	Cattle	Total	46,086	1,181,475	25.64
Melanesia	Cattle	Total	23,119	5,147,872	222.67
Middle Africa	Cattle	Total	315,614	58,212,350	184.44
Northern Africa	Cattle	Total	23,452	2,555,787	108.98
Northern America	Cattle	Total	11,528,824	200,851,122	17.42
Northern Europe	Cattle	Total	777,839	15,750,814	20.25
South America	Cattle	Total	13,502,458	781,107,861	57.85
South-Eastern Asia	Cattle	Total	864,723	107,165,878	123.93
Southern Africa	Cattle	Total	593,255	34,389,960	57.97
Southern Asia	Cattle	Total	2,175,886	229,843,748	105.63
Southern Europe	Cattle	Total	607,707	16,827,959	27.69
Western Africa	Cattle	Total	315,760	44,807,565	141.9
Western Asia	Cattle	Total	58,082	2,493,016	42.92
Western Europe	Cattle	Total	817,365	20,493,200	25.07

NATURE POSITIVE PRODUCTION WORKING GROUP



GOAL: By 2030, GRSB and its members will ensure the beef value chain is a net-positive contributor to nature.

Nature Positive Production Project

Since 2021, continued discussions on baselines and definitions (*What is nature positive? Who "legitimizes" a science-based land management practice?*), the increasing international call for evidence to back up nature positive claims, and the continued ask from producers for tangible support in the transition to on-the-ground nature positive land management outcomes, have necessitated additional workstreams in support of the Nature Positive Production Working Group.

What and why:

We have collectively identified three projects which would further progress the goals:

1. Collate related Nature Positive Production industry definitions and timelines to support GRSB members in stock-taking how their nature-positive commitments stand up to industry guidance

- Without a clear industry-wide understanding of what makes a claim legitimate on nature positive, we are comparing apples to oranges and could be contributing to green-washing of the term, and the beef industry.

2. Define principles behind science-based land management practices (SBLMP) and publish a "menu" of local practices by national/regional roundtable members that align with these principles

- Progress is slow when conversations stall around definitions. We are in support of ensuring local and regional scientifically-rigorous research comes forth to lead producers in this transition.

3. Map incentives (financial and otherwise) that reach producers to support nature positive outcomes, on an evergreen platform

- This project could be expanded to support GRSB-network publication of incentives that cross-cut all three goals (Nature Positive Production, Animal Health & Welfare, and Climate).

- Producers will need support on the nature positive transition but currently, there is no one-stop-shop to easily find incentives that are applicable to ranches in certain geographies and working under specific conditions.

Informing on goals progress

The GRSB Global Beef Sustainability Goals (2021) include multiple focus areas that were identified as the pathway for achieving a net-positive impact on nature. The areas include: increased adoption of science-based land management practices, recovery of degraded pastures, improved productivity, increased resilience, elimination of illegal deforestation and illegal conversion, increased production, financing, sourcing, and recognition of beef that does not contribute to additional deforestation, conversion or land degradation, improved traceability and value chain transparency, and incentives.

Improved production efficiency, supply chain traceability, and incentives are considered as foundational in supporting progress towards nature positive production, as well as other goal areas of climate and animal health & welfare. Roundtables are encouraged to list their activities as they relate to the goals cross-cutting elements of production efficiency, traceability, and incentives as part of their action plan(s).

During 2023, we have organized webinars to discuss the new regulation in relation to Environmental Due Diligence for the beef supply chain, which requires traceability and zero deforested beef products.

Next Steps

The GRSB Nature Positive Production Working Group will support its members in measuring and monitoring objectives, focusing on strategies to recover degraded pastures, improved productivity, greater resilience and elimination of deforestation and illegal conversion, improved traceability and transparency of the value chain, and incentives. To do this, it will develop projects that have global relevance but are applicable locally. It will continue to organize monthly meetings and webinars with topics relevant to its partners that help demonstrate the net positive impact for nature.

ANIMAL HEALTH & WELFARE WORKING GROUP



GOAL: Provide cattle with a good quality of life in line with section 7 of the World Organization for Animal Health's Terrestrial Code.

Following the release of our global Animal Health & Welfare goal, we have spent time understanding where individual roundtables are in their journeys as far as animal welfare is concerned, and over the past year, have focused on how to report against the goal. This has involved us collaborating with all national roundtables as well as SureHarvest to shape the reporting framework and template.

This has raised a number of new questions in particular around the criteria that can be used to report on Animal Health & Welfare (AHW) and the important differences between regions.

While pain mitigation is an important criterion and some advances in adoption have been seen in some regions, it is also clear that some regions lack clear options for producers, particularly when it comes to the on label use of products for pain mitigation in cattle. We also need more evidence on approaches that can increase adoption in regions where there are clear options but uptake is slow.

Another important criterion that we had not originally considered as part of the AHW goal is that of vaccination. This is a key determinant for health and welfare and has significant knock on effects in terms of productivity, climate and social impact. For many lower income countries, an increase in vaccination percentage is one of the most significant investments that can be made in animal health and welfare and delivers the greatest sustainability return on investment available.

We did embark on planning some concrete projects covering animal health and welfare this year, but have not secured funding for these to date. The activities we would like to be covered by such projects include vaccination and husbandry training in Southern Africa and the development of a clearinghouse for cattle care and handling resources that would be accessible to our member roundtables.

Next Steps

The working group will be looking to identify and develop projects in the areas of vaccinations and pain mitigation, as well as provide education resources for beef producers across regions.



GRSB COMMUNICATIONS COUNCIL

The GRSB Communications Council oversees and provides strategic direction on the development of long-term communications strategies for the organization, supporting its global roundtables and members to communicate about sustainable beef production and the global goals with key audiences. In 2023, there were over 50 members on the Council, representing a wide variety of subject matter expertise and experience from around the world.

Webinars

The Council hosted two webinar events this past year.

1

Communications Tactics to Manage Regulatory & Policy Issues

highlighted two separate case studies. Sara Crofoot, Environment Integration Lead from Beef and Lamb New Zealand discussed the emissions pricing policy and the industry response, which included a GHG calculator and extensive roll-out campaign to stakeholders. Jennifer Babcock, Senior Director, Government and Public Affairs from the Canadian Cattle Association, discussed achieving an exemption for saturated fat labels on ground beef through a strategic public and government relations campaign.

2

Cultivated Conversations

brought together industry experts to discuss the emerging industry of cell-cultivated protein. Dr. Paul Wood of Monash University is a renowned researcher in the field of cultivated protein and outlined the industry advances and challenges to date. Didier Toubia, CEO of Aleph Farms, discussed their method of production and how they look to supplement protein supplies in the future with their products. Crystal MacKay, CEO of Loft 32 which focuses on communications and marketing for agriculture, highlighted the opportunities to position sustainable beef positively alongside cell-cultivated products, in a world with growing protein needs.

Public Trust Survey

Presentations on regional research data on global trends and consumer behaviors were notable at the 2022 Communicators Summit, highlighting the challenge of inconsistent data and survey questions when relying on publicly available, or member provided, data sources. This makes it difficult for the GRSB to draw on this data to track public sentiment and attitudes. And there, it was proposed that GRSB develop a global survey to track changing public attitudes regarding sustainability-related topics of importance to its members.

2024 Objectives

The GRSB should develop a survey instrument that quantifies public attitudes that can:

1. Reliably quantify key attitudinal trends that align with the GRSB's aims and Global Goals
2. Equip the GRSB with reliable data (at regional and international scales) to effectively engage with key stakeholders (members, policy, regulators and NGOs)
3. Inform regional roundtables in the development of their own messaging and projects
4. Create opportunities for earned media coverage for the GRSB, GMA, roundtables and members

Over the past year, the Council has developed a proposed standardized set of survey questions that can inform the GRSB's internal and external engagement and communications. We look forward to final feedback and next steps from the Executive Committee in 2024.

GRSB COMMUNICATIONS COUNCIL

continued

Communicators Summit

The 2023 Communicator's Summit was held October 2, 2023 in San Diego, CA. The theme was "Powering Progress in Sustainable Beef Communications" and it focused on opportunities ahead for roundtables and members with key audiences.

The Summit consisted of two panel discussions and two related workshop sessions that provided opportunity for discussion and idea-sharing on the key panel topics. The first panel discussed successful strategies and methods to communicate progress on identified sustainability goals and featured food service, regional roundtables and conservation organizations. The second panel highlighted opportunities to engage with global policymakers and regulators at international events like COP. It was great to hear from Robynne Anderson of Emerging Ag in the introductory address, suggest how we can position our messaging to best resonate in these global forums.

The Council is excited to discuss next steps for work in the new year, based off the key themes and learnings presented by breakout groups following each panel.



Next Steps

The Communications Council will be looking to renew its membership, develop audience and goal-specific key messages, build global success stories and create a GRSB toolkit with resources available to all members. Plans for global perceptions research on key beef sustainability topics is in development.



PARTNERSHIPS & COLLABORATIONS

A key aspect of the Global Roundtable for Sustainable Beef's mission is to communicate the continuous improvement in beef sustainability. Through the collaboration with other businesses and organizations, GRBS continues to spread the news of continued progress and reaching significant milestones. SureHarvest, The Context Network, and COP28 are examples of such collaborations.



SureHarvest
SUSTAINABILITY FROM THE GROUND UP

Overview

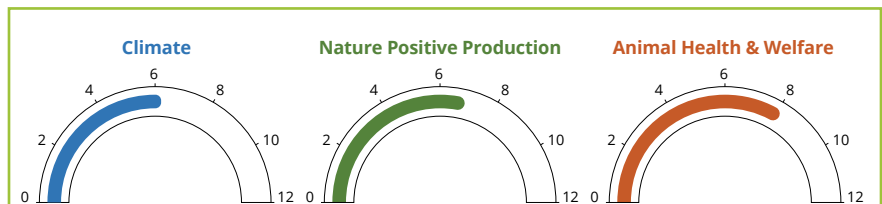
In 2023, progress was made in support of the GRBS Global Beef Sustainability Goals through the development and release of the Beef Sustainability Goals Measurement and Reporting Framework. Implementation of the GRBS Beef Sustainability Global Goals through the Framework marks a significant milestone since initial launch of the Global Goals in 2021. The Framework was developed

with a consultation process to receive input and contributions from National and Regional Roundtables and other GRBS members and stakeholders. The Framework was launched in April and an initial reporting process was piloted in September with National and Regional Roundtables. The reporting activities carried out in 2023 have set the stage for a comprehensive ongoing sustainability reporting process to measure and track progress towards the Global Beef Sustainability Goals.

Global Goals Milestones

- ▶ 2021 Launch of the Global Beef Sustainability Goals
- ▶ 2022-2023 Development and launch of the Goals Measurement and Reporting Framework and pilot reporting process
- ▶ 2024 (planned) Review of learnings (from pilot reporting process) and confirmation of future reporting strategy

As part of the framework, roundtables report on their progress working towards each of the Global Goals. Reporting on progress is done according to "Engagement Levels" which include four stages: Committed, Measuring, Demonstrating Progress, and Milestones and Review. The qualitative metric of Engagement Levels offers a comprehensive view of the progress that National and Regional Roundtables have made in supporting the goal areas of Climate, Nature Positive Production, and Animal Health and Welfare. Reporting of progress using the framework has provided a foundation to support collaboration between Roundtables on goals-related activities and initiatives, as well as helped inform support and resources that can be provided by GRBS to Roundtables and other GRBS members.



The diagrams show the number of Roundtables that are either Committed, Measuring, or Demonstrating Progress toward each global goal area as of late 2023. Because the reporting process was initiated in 2023, some Roundtables are in the initial stages of defining approaches and establishing methods that align with the global goals and not yet included in this summary figure. Although those Roundtables are not yet included in the summary figure, they typically are already carrying out activities and projects that may ultimately contribute to the global goals.

continued on next page

PARTNERSHIPS & COLLABORATIONS

continued



Collective Efforts of Regional Roundtables

The GRSB Beef Sustainability Goals Framework was designed based on the guiding principles of the Global Beef Sustainability Goals to facilitate a measurement and reporting approach that is globally applicable, locally relevant, and harmonized with existing initiatives. The Framework also serves as a catalyst for innovation and collaboration between National and Regional Roundtables as well as other GRSB members. Select examples of efforts being carried out by Roundtables are highlighted below, with more details in later sections of this report.

CLIMATE:

The **Australian Industry** has invested over \$140 million in activities to support carbon reduction to reach a goal of net zero by 2030, showing progress of 65% reduction in emissions between 2005 and 2020. The **New Zealand** Roundtable members have utilized a range of activities to support the climate goal. These activities include the use of GHG calculators, education and outreach alongside industry partners, and assisting farmers with developing written plans to meet government requirements for measuring and managing GHG emissions. The **Argentinian**

Roundtable has initiated the process for measuring progress on the climate goal and has agreed on a set of indicators that support livestock producers in taking action to reduce emissions. Every Platform from the countries that are part of the **European Roundtable for Beef Sustainability (ERBS)** has committed and is aligned to the ERBS emissions reduction target, aligning action across Europe. The ERBS has already completed two rounds of progress reporting in 2021 and 2023. Multiple activities were reported across Europe, covering a diverse portfolio, focusing on what's needed to drive progress in each local context.



Globally reduce the net warming footprint of each unit of beef by 30% by 2030, on a pathway to climate neutrality.

ANIMAL HEALTH & WELFARE:

The **Bolivian Roundtable** focuses on improving education and awareness on objectives related to the sustainability of the beef value chain and supports SEDACRUZ in its departmental sustainability policy in the objective of animal health and welfare.

The **Paraguayan Roundtable** is working on measurement of the goal and leverages the sustainability assessment system (SAGAS) for related data and has developed a large training program with more than 1,500 technicians, students, producers, and trained professionals. The **U.S. Roundtable** goals and sector targets focus on strengthening a commitment to the highest standards of cattle care by supporting increased industry-wide participation in trainings and certification programs, such as the Beef Quality Assurance (BQA) program.



Provide cattle with a good quality of life and an environment where they can thrive.

NATURE POSITIVE PRODUCTION:

The **Canadian Roundtable**, with six other national beef organizations, has developed multiple targets to support and maintain native grassland. This includes maintaining 35 million acres of grassland in the care of the beef producers, by focusing on collaboration, incentives and projects for habitat conservation. Projects include the Species At Risk Partnerships on Agricultural Lands (SARPAL) and the Resilient Agricultural Landscape Program (RALP). The **Brazilian Roundtable** leverages the commitment of its members to the Brazilian Forestry Code and uses the GPS sustainability assessment to help monitor sustainability performance for the Nature Positive goal and other goals.



By 2030, GRSB and its members will ensure the beef value chain is a net-positive contributor to nature.

PARTNERSHIPS & COLLABORATIONS

continued



PURPOSE: The Global Roundtable for Sustainable Beef (GRSB) engaged The Context Network, an agribusiness consulting firm with global beef value chain experience, to understand the interests and needs of GRSB members and stakeholders regarding measuring and tracking GHG emissions.

PROCESS:

The project included:

- **INTERVIEWS** with 28 stakeholders across the value chain that included discussions on topics such as:
 - Their organization's commitments and goals regarding GHG emissions
 - Perspective on current processes for measuring and tracking GHG emissions
 - The role of GRSB in providing guidance (principles and criteria) or a tool for measuring and tracking GHG emissions in beef value chains
- A **WORKSHOP** on October 4, 2023 in San Diego with over 25 in-person and 10 virtual attendees to determine the future vision of GRSB's role in:
 - Providing guidance (principles and criteria) or a tool for measuring and tracking GHG emissions
 - Identifying associated solutions and potential next steps

OUTCOME:

The project provided several insights to identify the role of GRSB and the next steps GRSB can take in providing guidance or a tool for measuring and tracking emissions including:

- Communicating with existing frameworks such as SBTi and GHG Protocol to align on the methodology used to measure and track emissions specific to beef production systems, as well as the enormous amount of carbon sequestration that occurs on the billions of acres of grazing land being stewarded by beef producers around the world
- Collaborating with academic institutions and NGOs
- Understanding the need for a tool and how to complement existing tools



The Context Network Group hard at work on the Climate Goal!

PARTNERSHIPS & COLLABORATIONS

continued



COP28
UAE

“Livestock production is a key part of the overall food system, as important human nutrition as it is to maintain healthy soils for crop production, we need to help policymakers understand the need for holistic solutions, not just one-liners and simplistic approaches to complex issues.”

— Ruairaidh Petre, Executive Director

The Conference of Parties (COP28) under the United Nations Framework Convention on Climate Change (UNFCCC) took place from November 30 to December 12, 2023, in Dubai, United Arab Emirates. The GRSB delegation included Bob Lowe, GRSB Vice President, along with 13 members representing GRSB from all across the beef supply chain.

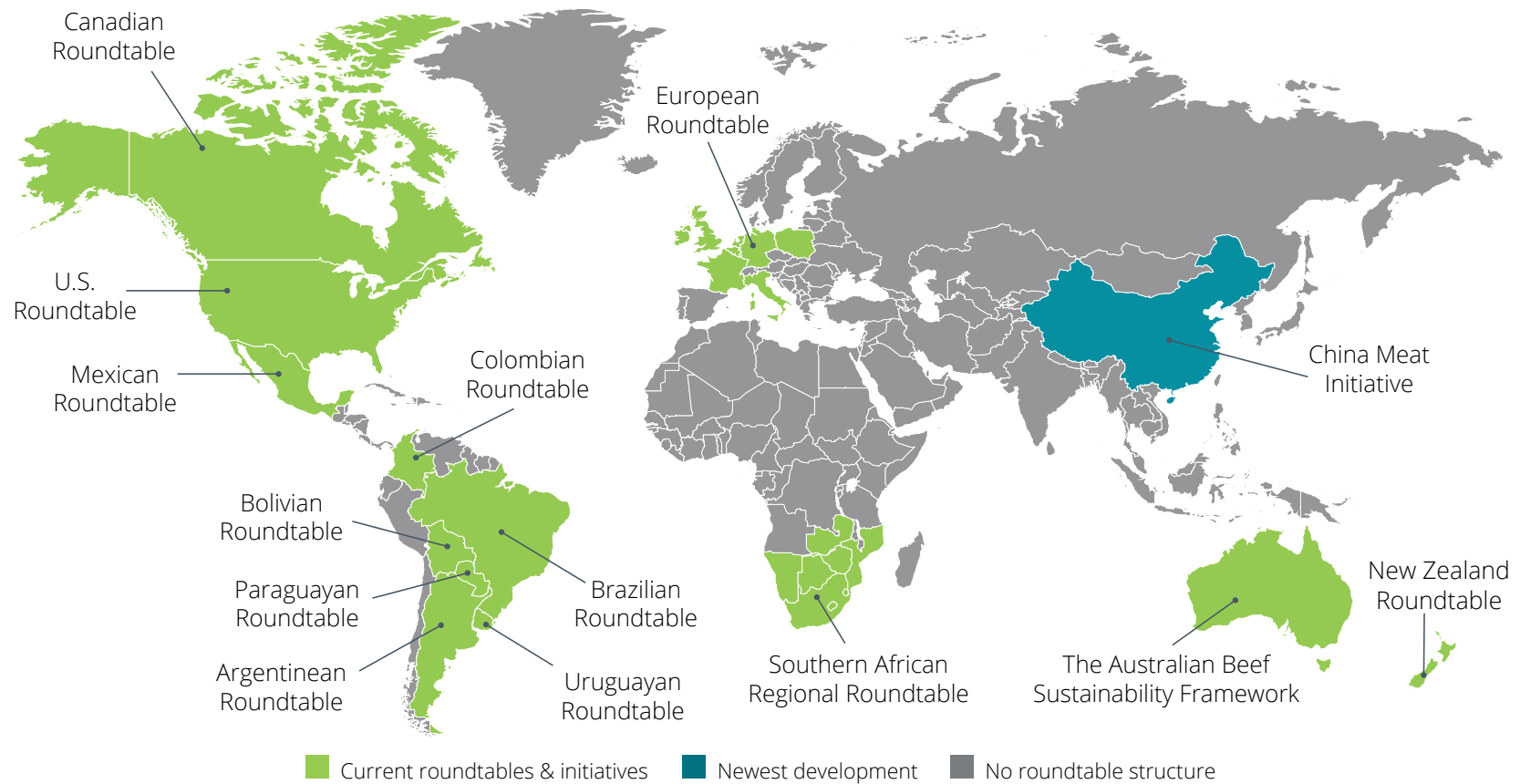
GRSB was represented on multiple international stages by Ruairaidh Petre, Executive Director, and Josefina Eisele, Regional Director, to promote not only the production of sustainable beef but also the importance of a nutrient-dense food source that can be produced from an animal that can consume products humans can't digest.

Discussions included the role of sustainable livestock in restoring degraded lands, farmer-led adaptation and mitigation measures through improved Global Livestock Sustainability, connecting farmers, scientists, business, and the public, and getting cattle producers engaged in the climate conversation.

There was a clear agenda at COP28 and it wasn't in favor of the beef industry. Anti-livestock lobbyists sought out ways to push their views by releasing guides on greenwashing terms the livestock industry may use and pushed the organizers to increase the number of plant-based foods on its menu.

Ruairaidh made it clear that GRSB's mission at COP28 wasn't to slander any organization, business, or market, but to share the importance of livestock production across the world. “Livestock production is a key part of the overall food system, as important human nutrition as it is to maintain healthy soils for crop production, we need to help policymakers understand the need for holistic solutions, not just one-liners and simplistic approaches to complex issues.”

SUSTAINABLE BEEF REGIONAL ROUNDTABLES & INITIATIVES



Beef-focused Sustainability Roundtables & Initiatives

ARGENTINA (Est. 2017)*
www.macs.com.ar

AUSTRALIA (Est. 2016)*
www.sustainableaustralianbeef.com.au

BOLIVIA (Est. 2021)*

BRAZIL (Est. 2008)*
www.gtps.org.br

CANADA (Est. 2015)*
www.crsb.ca

COLOMBIA (Est. 2017)*

EUROPE (Est. 2018)*
www.saipatform.org/european-roundtable-beef-sustainability/

SOUTHERN AFRICA (Est. 2018)*
www.sarrsb.org

MEXICO (Est. 2018)*

NEW ZEALAND (Est. 2019)*
www.nzsustainablebeef.co.nz

PARAGUAY (Est. 2018)*
www.carnesostenible.org

U.S. (Est. 2015)*
www.usrsb.org

URUGUAY (Est. 2023)*

CANADIAN ROUNDTABLE FOR SUSTAINABLE BEEF



MISSION: To advance, measure and communicate continuous improvement in sustainability of Canadian beef value chain.

VISION: That the Canadian beef value chain is a global leader in environmental, social and economic sustainability and part of a trusted and thriving food system.

- ▶ Sustainability performance measurement through Benchmarking and Goals
- ▶ Projects and Initiatives that support our strategic goals
- ▶ 3rd party audited certification program recognizing sustainable outcomes aligned with principles of beef sustainability, enabling sustainable sourcing, and building consumer trust in the sustainability of Canadian beef, delivered through a certification logo and claims.
- ▶ Communications and Engagement embedded in all the above areas



CRSB is led by its multi-stakeholder [membership](#), guided by an elected [Council](#) and four [committees](#), with over 50% member organization participation. Six new members joined the CRSB in 2022-23, demonstrating the value of CRSB's work. Check out our [members](#).

Key Highlights

- Recognized with Ducks Unlimited Canada's inaugural Conservation Award of Distinction
- Completion of the second National Beef Sustainability Assessment and Strategy
- Five-year review and updates to the Certified Sustainable Beef Framework
- Canadian Agri-Food Marketers' Alliance nomination for campaign promoting the CRSB Certified program

We have been focused on two key workstreams this year – the second National Beef Sustainability Assessment and Strategy and completing the five-year review and update of the CRSB Certified program.

The National Beef Sustainability Assessment measures the environmental, social and economic sustainability performance of the Canadian beef value chain from farm to fork. Our second assessment has been completed following a two-year process including data collection, analysis and expert review. Two scientific papers have been submitted for peer review.

The communications team is currently preparing comprehensive reports and supporting communications, while strategic member engagement this year informed the accompanying Sustainability Strategy, strongly linked with the Canadian beef industry's 2030 goals.



CANADIAN ROUNDTABLE FOR SUSTAINABLE BEEF

Canadian Roundtable, continued



Following in-depth review of each indicator in the program's Standards for sustainable beef production and primary processing in 2022, this year has focused on areas identified as gaps, and making improvements, including the Chain of Custody Requirements and reviewing the program's claims (supported by consumer research). Updates are expected to be finalized and published by the end of this year.

An estimated 20% of Canadian beef cattle herd spent time under the management of CRSB Certified Operations

Approximately 5.7 million acres of land – **4.9 million of which are estimated to be native grazing acres** under the management of CRSB Certified Operations

Demand for CRSB Certified beef remains strong; as of June 30, 2023, there are 12 companies sourcing through the program, and three major Canadian retailers made commitments for future sourcing.

CRSB continues to be at the forefront of beef sustainability conversations in Canada - with producers, industry, supporting policy, and the public. We have demonstrated award-winning success in partnering with others to showcase the beneficial ecosystem services of Canadian beef, and sharing diverse stories from across Canada. We focused on promoting the CRSB Certified logo, through an award-nominated public digital campaign that also provided great insight on audience interests for embarking on the development of our next three-year communications and marketing strategy.

Andrea White, our Director of Marketing and Stakeholder Relations enjoyed working with GRSSB Communications Council to plan and help facilitate the Communicators Summit in San Diego this fall.

Check out our [2023 Annual Report](#) for more details on all our workstreams.



STAFF TEAM

The CRSB has a small but mighty staff team, supported by subject matter experts and external contractors.



Monica Hadarits
Executive Director



Andrea White
Director, Marketing &
Stakeholder Relations



Kara Barnes
Director, Science & Programs



Jenna Sarich
Technical Consultant & Writer



Cailey Church
Intern

U.S. ROUNDTABLE FOR SUSTAINABLE BEEF



The U.S. Roundtable for Sustainable Beef (USRSB) is a multi-stakeholder initiative developed in 2015 to advance, support and communicate continuous improvement in sustainability across the U.S. beef value chain. The USRSB achieves this through leadership, innovation, multi-stakeholder engagement and collaboration and aims for the U.S. beef value chain to be the trusted

global leader in environmentally sound, socially responsible and economically viable beef.

In 2023, the USRSB continued work towards the measuring and tracking of its [High-Priority Indicator Goals and Sector Targets](#). Members and staff explored existing resources and data to create benchmarks that will be used to measure future

progress. Included in this process was the creation of additional resources to support the U.S. beef industry in exploring areas of opportunity for further success from pasture to plate.

Learn more at USRSB.org/Goals.

USRSB Resources

Recognition Program

The USRSB developed an official recognition process in 2019 for member industry programs seeking recognition for their program's alignment with the [U.S. Beef Industry Sustainability Framework](#). As of fall 2023, the program has grown to include 22 external programs. This rigorous three-year recognition requires the program manager to submit an application and supporting materials detailing the inclusion of the Framework in their program. After evaluation and recommendation by an independent third-party, the program must then be approved by the USRSB Board of Directors to receive recognition. To find out more about the recognition program, visit USRSB.org/Recognition.

Sustainability Modules

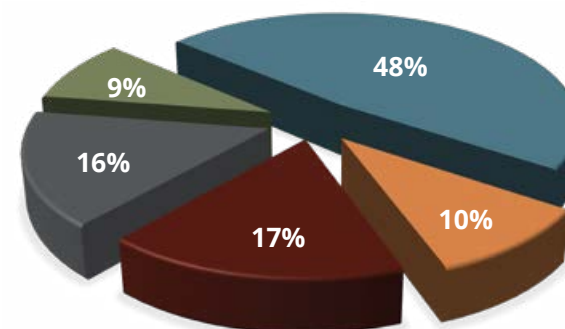
The USRSB offers a series of sustainability modules for each sector of the beef supply chain that address opportunities for improvement in sustainability. The modules use real world examples and

actionable solutions to provide practical resources to individuals and organizations who are interested in enhancing their operation. In 2023, the USRSB launched a Grazing Management Planning Module to aid those with grazing operations in exploring further operational environmental and financial resilience. All modules are free to use and do not require a login to access. Access the modules and other USRSB resources at USRSB.org/Resources.

Supported Projects

Driving continuous improvement means supporting potential advancements in beef sustainability from all angles. One way the USRSB contributes to advancing improvements is through project support. Organizations that have research projects, pilots or tools shown to advance, support and communicate continuous improvement in the sustainability of U.S. beef can receive official support from the USRSB after going through an application and evaluation process. Find out more at USRSB.org/USRSB-Supported-Projects.

MEMBERSHIP



MESA REDONDA DE GANADERÍA SUSTENTABLE DE MÉXICO



Mission: Contribute to the sustainability of the livestock value chain in Mexico through the cooperation of its participants and integrating social, environmental and economic elements.

Vision: The MRGSM is a reference group for society in sustainable production and incorporate all relevant actors in the livestock value chain, generating sustainable production strategies, supporting the definition of public policies and enhancing sustainable rural development.

Mexico is a country of more than 125 million people and is one of the most important livestock producers and consumers (6th) countries in the world. Livestock is a key activity in the Mexican economy; it is developed in 76% of the land in Mexico, comprising more than 641 million animals and involving more than 1 million of people. Promoting and enhancing sustainability through the value chain is a key element to increase the benefits for biodiversity and people and the competitiveness of this activity.

The Mexican Roundtable for Sustainable Livestock started in 2014 and after a two-year inactivity period, it was reactivated in 2018. It is part of GRSB since 2020 and it was legally established in 2021. The Roundtable is focused on promoting the sustainability in the livestock sector, including the beef, dairy and swine industries.

Key Highlights

- Participation of more than 35 partners, representing different actors in the value chain such as producers, processing industry, retail, research and cooperation institutions, allied consultants, civil society organizations and observing institutions as government agencies.
- Establishment of two new committees: dairy and a swine production (Fig 1).
- Participation in national and international forums for visualizing and position the sustainability in the Mexican livestock industry.
- Support for projects to reinforce the transition to sustainable livestock, for example:
 - Mainstreaming Ecosystems based adaptation approach in cattle production in northern Mexico.
 - Territorial Planning and Financial Innovation to increase Mexico's resilience to climate change with ranchers from Michoacán, Jalisco, Tabasco and Chiapas (SABERES project).
 - GHG emissions level baseline (Tier 2) for mitigation scenarios in Chiapas, Chihuahua, Coahuila, Jalisco, Nuevo León, Sonora, Tabasco, Tamaulipas, Veracruz, Yucatan and Chihuahua.



Figure 1. Committees of the Mexican Roundtable.

NEXT STEPS

- Complete the strategic planning process: definition of priorities, goals, indicators and means of verifications.
- Increase the roundtable constituency, strengthening the participation of unrepresented sectors (as meatpackers, restaurants, financial institutions).
- Increase awareness in Mexican society and government about the Roundtable and the importance of sustainability in the livestock industry.

LEADERSHIP GROUP

Board of Directors

President: Homero García de la Llata — Confederación Nacional de Organizaciones Ganaderas

Vice-president: Jesús Ramos — Carnes de Múzquiz

Secretary: Héctor Garza — Asociación Mexicana de Productores de Carne

Treasurer: María del Consuelo Elvia Ayala — Centro Educativo Familiar de Desarrollo Básico Sostenible, A.C.

Control Council

- Leticia Deschamps
- Xiomara Chávez
- Josefina Eisele

Technical Secretariat

- Luis García — Confederación Nacional de Organizaciones Ganaderas
- Enrique López — Asociación Mexicana de Productores de Carne
- Génesis Rosales — Asociación Mexicana de Productores de Carne
- Leticia Deschamps — Instituto Interamericano de Cooperación para la Agricultura - IICA México
- Eduardo Rendón-Salinas — World Wildlife Fund México
- Diana Catherine Forero — World Wildlife Fund México

MESA BOLIVIANA DE CARNE SOSTENIBLE

Vision: Develop a benchmark and sustainable production model for the Bolivian bovine meat chain, which is healthy, environmentally friendly, socially responsible and economically viable.

Mission: Promote the participation and comprehensiveness of all sectors of the Bolivian bovine meat chain, to position a better image and competitiveness of our bovine meat product in the national and international market.

GOVERNANCE

The Bolivian Sustainable Meat Roundtable has 14 members representing 5 sectors of the bovine meat chain: production, organized civil society, academia, input suppliers, livestock industry and trade, restaurants. Currently, the MBCS has an elected board of directors with representation from each of the sectors.

ADVANCES

During the 2023 administration, the Bolivian Sustainable Meat Board worked on its statutes, which were approved in August 2023. At the same time, it is reviewing the sustainability indicator guide for the bovine meat chain with a deadline established until November of this year.

Main Achievements

- Consolidation of the Bolivian Sustainable Meat Board with its Statutes
- Has a consolidated governance structure
- There is an indicator guide in the process of review
- Training in animal health and well-being is being carried out for livestock producers.
- The National Round Table of Bolivia is supporting the Departmental Autonomous Government of Santa Cruz for the implementation of the Departmental Sustainable Livestock Policy, which will be approved by the Departmental Law of Santa Cruz, recognizing the Bolivian Sustainable Meat Roundtable as the highest body of consultation and technical support to the Autonomous Departmental Government of Santa Cruz in the process of implementing sustainable livestock farming throughout the departmental territory of Santa Cruz.



MBCS COMMITMENTS

Develop case studies
Train all actors in the bovine meat chain
Comply with the commitments assumed with GRSB



MESA PARAGUAYA DE CARNE SOSTENIBLE

Inspirational dream: “Paraguay, World Reference of Sustainable Beef”

Vision: “Be a reference in Paraguay for the production of healthy meat as a product of a sustainable value chain”

Mission: “Promote the sustainability of the value chain of Paraguayan beef”

The Paraguayan Roundtable on Sustainable Beef (MPCS) brings together all the links in the beef value chain, seeking to turn Paraguay into a global reference. The MPCS includes the sectors of industry, production, input and service providers, consumers, as well as civil society organizations. In addition, the public sector, academia and international cooperation agencies are included as observers. 46 members.

THE PARAGUAYAN ROUNDTABLE FOR SUSTAINABLE BEEF INCORPORATES:

- ▶ 34 production cooperatives
- ▶ 7.000 livestock producers of different sizes
- ▶ 10 slaughterhouses that export beef, 100% of Paraguayan beef exports
- ▶ 99% of the financing resources, through the banks to the agricultural sector, come from the members of the MPCS
- ▶ Over 100 beef retail outlets
- ▶ Main NGOs of the country
- ▶ Official institutions as observers

Background

- 2018: Technical definitions of Principles and Criteria. Legal Constitutive Assembly.
- 2019: Institutional strengthening. Communications’ plan. Networking. Field trips.
- 2020: Sustainable livestock self-assessment system (SAGAS) development.
- 2021: Sustainability championship launch.
- 2022: Training courses on sustainability.
- 2023: Alliances and strengthening.

MPCS PRINCIPLES

Natural resources
Individuals and communities
Animal health and welfare
Food
Efficiency and innovation
Economic viability



ACTION IN PROGRESS

- ▶ Members’ self-assessments on sustainability. 425 producers in the system
- ▶ Agreements and alliances for sustainable synergies
- ▶ Communication and information for participation and impact
- ▶ Sustainability Championship 3rd year
- ▶ Training for different audiences
- ▶ Alliances and joint work with related institutions
- ▶ Own data investigations to strengthen communication and position of Paraguay as a sustainable producer

MESA ARGENTINA DE CARNE SUSTENTABLE

HIRING A NEW EXECUTIVE DIRECTOR AND MANAGER

The MACS made a public call for the search for Professional Consulting Services for the Executive Coordination of the Board. The objective was to contribute to the fulfilment of the Association's objectives and to implement the strategic plan of the Board. In the month of March 2023, progress was made with the hiring and commissioning of the new Executive Director Dr. Leopoldo Estol, a leading reference in Animal Welfare, and the Manager MV. José M. Lucero Schmidt, specialist in Agribusiness and food.

NEW ADDITIONS

During the last year, seven new members and three new advisors were added:

- Tropical Forest Alliance (Collaborators)
- Lartirigoyen (Inputs and Services)
- Nutrefeed (Inputs and Services)
- Datamars (Inputs and Services)
- INTI (Collaborators)
- FIDA (Civil Society)
- Villa María Pampeana (Agricultural Associations and producers).

Incorporation of three New advisors:

- Dr. Marcos Giménez Zapiola, Specialist in the area of Animal welfare
- Dr. Marcelo Ghezzi, Specialist in the Area of Animal Welfare
- Dr. Leonardo Mascitelli, Specialist in the area of Agri-Food Safety and International Trade.

SUSTAINABLE MEAT INDICATORS

Monthly meetings were held on production, transportation and industry indicators. Regarding production indicators, the meetings were monthly and weekly with the objective of advancing and having faster completion results. Progress was made in improvements to the survey design.

FRAMEWORK AND GRSB

Starting in March 2022, participation in the first meetings for the preparation of the Framework proposed by the GRSB will begin. The purpose of this document is to serve as a working reference related to the discussions and development of the Global Roundtable for Sustainable Beef (GRSB) sustainability goals framework.

WORK CARRIED OUT

From the Tropical Forest Alliance (TFA), two works were commissioned from the MACS, which

were developed by the Faculty of Agronomy of the University of Buenos Aires (FAUBA). The first was completed in the 2nd half of 2022 and is titled "Analysis of the beef supply chain in Argentina with a focus on the Chaco region." In May 2023, the second project focused on good practices and conservation was completed. It was titled "Analysis of beef production practices in the Gran Chaco region."

New Board of Directors:

- **President:** Carlos D Barrios Barón (Agropecuaria La Criolla)
- **Vice President:** Manuel Jaramillo (Wildlife Foundation)
- **Secretary:** Claudio Cabral (SilvaTeam)

Participation in Relevant External Spaces:

- * CREA Congress – September 14 and 16, 2022, exposing sustainability in Meat production.
- * Gustavo Marino's participation in the GRSB Global Conference. 11/8/2022 in Denver, COLORADO, USA. "What does livestock farming mean for a country like Argentina?" where he presented the current situation of the MACS, its members, scope and challenges.
- * Participation in the EU – Argentina Business Forum.
- * The Seminar "The MACS and a vision of the sustainability of Argentine meats" was held during the Palermo Rural exhibition in July 2023.



MESA URUGUAYA DE CARNE SOSTENIBLE



Uruguay has launched the Uruguayan Roundtable on Sustainable Beef “Mesa Uruguaya de Carne Sostenible” (MUCS).

Uruguay reinforces its commitment to sustainability in the beef value chain with the launch of the MUCS. Comprising prominent stakeholders from the local and international meat industry, MUCS was officially introduced on September 11, 2023, at the Rural del Prado in Montevideo.

The launch event included the signing of a letter of intent by 19 founding members, and the initial steps are already being taken to progress with the legal establishment and the development of a strategic plan based on the sector’s materiality assessment and the pillars of the GRSB.

Members from Uruguay are delighted to extend a warm welcome to all stakeholders in the beef supply chain for the GRSB Conference 2024. During this event, our nation will proudly showcase its advancements and substantial contributions toward global beef sustainability objectives.



Acknowledgment to those who make these first steps possible



LSQA



FRIGOLY
PLANTA FRIGORIFICA



Marfrig



CONTROLUNION



HEREFORD
URUGUAY

Boehringer
Ingelheim

minerva
foods

Santander
Agronegocios

MESA BRASILEIRA DA PECUÁRIA SUSTENTÁVEL



SUSTAINABILITY IN LIVESTOCK DISCUSSED FROM END-TO-END OF THE CHAIN

The [Brazilian Roundtable on Sustainable Livestock](#) is a non-profit association with almost **70 members** who work together towards the **mission of promoting the development of sustainable livestock in Brazil**.

In the year we celebrated our 15th anniversary, we planned the **next steps** for the Brazilian sustainable livestock. As a result of a collective development of ideas with our members, we revisited **our values**, built a **2030 vision**, and established four **works fronts**. We also unfolded it into a **series of actions**, some of which we have already started and will share below.

Vision: To be the voice of sustainable livestock in Brazil to the world by discussing emerging issues, taking solid positions, and sharing knowledge. To connect the links in the chain and encourage stakeholders to make commitments and deliver concrete results. To prepare the most thorough cattle ranching sustainability database and show that Brazil has the greatest global potential to produce beef sustainably.

Values: Sustainability, Innovation, and Transparency.

Work fronts: Knowledge, Engagement, Communication, and Education.

ACTIONS

External Communication

We actively attended national and international events aiming to influence the global agenda.

- **Member-at-large:** In December 2022, Luiza Bruscato, executive director of BRSL, was elected member-at-large of the GRSB Executive Committee.
- **Summit Land & Carbon:** We spoke about the role of grassland in global climate goals and solutions for monitoring these areas on the panel *Breaking Barriers in Grassland Monitoring: Fostering Collaborative Solutions and Interactive Dialogue Across Sectors*, during the Summit held in Brussels in June 2023.
- **Sustainable Livestock Forum 2023:** The 3rd edition of the Sustainable Livestock Forum was held on September 28th, 2023, at Expo Rio Preto, and featured the participation of renowned professionals in the sector and experts who raised challenges, opportunities and paths regarding climate, efficient use of land, traceability, and animal welfare in Brazilian livestock production. 120 people attended the discussions in person, which were divided into 4 panels.



WORKING GROUPS (WGs)

We reviewed the structure and governance of the WGs and discussed relevant topics in depth with the different links of the chain experts and guest researchers.

- **Climate:** In October 2022, the WG published a report and organized a webinar for discussions on the *paths to a low-carbon livestock production chain*.
- **Traceability:** In March 2023, the WG published a report and organized a webinar for discussions on *strategies for adopting traceability applied in the Brazilian livestock chain*. And since April, it has been working on a *national public policy*.

MESA BRASILEIRA DA PECUÁRIA SUSTENTÁVEL

Brazilian Roundtable, continued

- **Land Use:** In August 2023, the WG published a report and organized a webinar for discussions on the *directions for a livestock chain with more efficient land use*. In addition, also organized a *technical visit* to the Image Processing and Geoprocessing Laboratory (Lapig) after identifying the need to bring academia, technicians from organizations and producers closer together.
- **Animal Health and Welfare:** In August, we started a new WG, which will work on *guidelines for improving animal health and welfare* in the Brazilian livestock.



ADVOCACY

We participate in **national and international forums and meetings**, defending positions and providing technical knowledge on emerging themes. In addition to meetings with Agriculture and Environmental Ministries of Brazil and Embassies worldwide, we participate in international missions.

- **Mission in Berlin:** Invited by the Brazil Germany Agropolitical Dialogue (APD), we participate in a series of dialogues on the *impacts of the EU Green Deal on Brazilian agriculture* during a week long exchange in Berlin.
- **Brazil Agri food Facts:** The initiative was held in Brussels in November 2022 by the Brazilian Export and Investment Promotion Agency (Apex Brasil) and raised discussions about *sustainable food and agriculture* and brought relevant data about agricultural production in Brazil

SUMMARY DATA ON SUSTAINABLE LIVESTOCK

Launched on September 2023, the [first report on sustainable livestock](#) presents an **overview of livestock farms** participating in the Guide of Indicators on Sustainable Livestock (GIPS). In total, data from **925 farms** registered in the GIPS between 2021 and 2022 were analyzed, which provided a comprehensive and concise overview of the results and impacts achieved through the implementation of the Guide.



Brazilian Roundtable on Sustainable Livestock

BRSL IN NUMBERS

+9 new members companies added.

19 lectured and **7 organized** events.

More than **7,700 people** reached.

35 interviews and 31 press releases and articles produced and released. **More than 250 reports published** in the Brazilian and international press.

More than 16,000 leads worldwide registered in the newsletter.

139.659 impressions and an average of **7% of monthly engagement** on LinkedIn.

2,700% increase on Instagram engagement.

Around **1,250 monthly visits** to the website.



EUROPEAN ROUNDTABLE FOR BEEF SUSTAINABILITY



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

VISION: We believe we can achieve a world in which all aspects of the beef value chain are environmentally sound, socially responsible, and economically viable.

PROGRESS REPORTING

This year, the ERBS has run our 2nd progress reporting cycle, where each of our 6 Platforms in Country report on progress versus their baseline, and activities. To help us make the most of this milestone, we built further on our measurement-reporting-verification system and introduced some additional guidance and parts to our Framework. The progress reporting has highlighted the huge commitment from the European beef sector, with over 100 activities reported across the 6 Platforms all helping farmers to drive progress. There are examples of credible data-backed progress being made across animal medicines, animal welfare, GHG, and farm resilience, leaning on leadership and innovation from the Platforms in their approach, which also includes adaptability of activities to the local context, ranging from training, to scale-up, to research. There is a big focus on better data to support decision making and making knowledge accessible to farmers.

ERBS ANNUAL EVENT

The ERBS hosted its Annual Event in Ireland on the 3rd and 4th October 2023, centred around the theme of enhancing beef sustainability through both research and technology. The event was hosted by Bord Bia and included 45 + attendees, from 18 x different food and drink companies. The event started with an inspiring day of field trips, where members benefited from the opportunity to engage directly with farmers, sharing knowledge on topics such as efficiency and environmental sustainability. The field trip day included visits to Blackwater Farm where Michael showed the importance of data and smart information in making informed farm decisions, as well as his strong focus on grassland management; Teagasc

Research Centre where we learned about the research in beef production, with a strong focus on sustainability-driven performance; and the ICBF (Irish Cattle Breeding Federation) which showcased the transformative power of genetics in enhancing cattle performance. The keynote speaker was Aisling Molloy, a farmer who used her bullseye lens approach to inform us of the sustainability choices an Irish Beef Farmer faces every day. And in the spirit of encouraging collaboration in the sector, the ERBS invited other collaborative organisations to the event – including, Eleanor Luther on behalf of the Global Meat Alliance, Claire Carlisle from Animal Health Europe, and David Kenny representing the Animal Taskforce.



EUROPEAN ROUNDTABLE FOR BEEF SUSTAINABILITY

European Roundtable, continued

REVISING THE ERBS TARGETS

The ERBS uses Outcome Targets to unite the activities and commitment of actions in the European Beef sector. It was a significant step to align on outcome targets in 2019 as the ERBS was formed – to ensure the Targets continue to be ambitious, relevant, and impactful, both at a European scale as well as supporting the global beef sector progress, the ERBS has been working on a review of these targets. Members of the ERBS Technical Working Group have formed a Task Force to help with the development of the new targets. A proposal for revised ERBS targets is planned to be sent out for external consultation early in 2024.

240,000+
 European farmers
 represented by ERBS
 platforms



LANDSCAPE REVIEW

To kick-off the target review process, the ERBS engaged with an expert to undertake research into the latest science, policy, and marketplace developments in the European Landscape. The scope of this research covered environment and nature, animal welfare and medicine, social topics, and economic resilience of farming. This review underlined the ambition shown by the ERBS targets as outcome targets, and the value of collaborating as a Roundtable at a European level.

MATERIALITY ASSESSMENT

This year the ERBS launched its 2023 Materiality Assessment, where both ERBS members and a wide range of external stakeholders were consulted. The materiality assessment defined the social, environmental, and economic topics that matter most to the ERBS and its stakeholders, as a key input into the process for revising the ERBS targets. The results of this materiality assessment will help to: prioritise our focus and resources, highlight important issues that are not being addressed, identify trends on the horizon and underline areas of interest for external stakeholders.



Knowledge Share Webinars

Over the past year the ERBS has continued to share knowledge and research with its members via Knowledge Share Webinars. The following topics have been discussed:

- Introduction to the ERBS – to assist members in promoting the good work of the ERBS within their organisations.
- Biodiversity – where we learned a practical understanding of how farmers can maintain and enhance biodiversity on beef farms.
- Deforestation – understanding EU legislation and how the sector needs to respond.
- Animal Welfare – the impact of Animal Welfare on sustainability in Beef Farming.
- Landscape Research – diving into the research undertaken into the latest science, policy, and marketplace developments in European Landscape. This research has assisted in setting our new ERBS targets.

AUSTRALIAN BEEF SUSTAINABILITY FRAMEWORK



ABSF VISION: A thriving Australian beef industry that strives to continuously improve the wellbeing of people, animals, and the environment.

THEMES:



Best Animal Care



Economic Resilience



Environmental Stewardship



People & Community

AUSTRALIAN BEEF SUSTAINABILITY

Sustainability is the production of beef in a manner that is socially, environmentally, and economically responsible. We do this through the care of natural resources, people and the community, the health and welfare of animals, and the drive for continuous improvement.

2023 HIGHLIGHTS

- In 2020, the Australian beef industry had reduced its net CO2e emissions by 64.1% since 2005.
- The total mortality rate of cattle exported on sea voyages has more than halved in two years, reaching a record low of 0.05% in 2022.
- 400 litres of water is used per kilogram of liveweight gain, down 18% from the most recent five years, and 73% lower than 1985.
- Provision of support to Indonesia for management of Foot & Mouth Disease, including \$5.9m AUD for vaccinations, in addition to extensive industry contribution.
- 43.7% of grazing land is being actively managed for biodiversity, including weed and pest management, prescribed burning, revegetation, soil remedy works, and fencing riparian areas.

FRAMEWORK IN ACTION

- The ABSF took an active role in multiple international initiatives, including providing feedback on the TNFD recommendations through the piloting phase, guiding Australia's commitment to the Global Methane Pledge, and assisting banks with the Net Zero Banking Alliance.
- The ABSF was involved and presented to a number of international meetings, including the GCSB, COP27, and the Global Agenda for Sustainable Livestock.
- In a commercial first, Victorian-based beef processor, Greenham, has applied the ABSF to its grassfed supply chain and delivered a new product to market, along with financial incentives and ecological benefits to the farm gate.
- The ABSF has been working closely with the Sheep Sustainability Framework and the Australian Dairy Sustainability Framework to seek areas of commonality, allowing for greater allocation of resourcing and unified messaging among Australian livestock industries.

The Australian beef industry is committed to the following five goals:

	Best Animal Care	The Australian beef industry is guided by the five domains of animal welfare. The industry provides all cattle with an environment in which they can thrive in accordance with these domains.
	Environmental Stewardship	By 2030, the Australian beef industry will demonstrate its net positive contribution to nature.
	Climate	The Australian beef industry will achieve net zero greenhouse gas emissions across its production and processing sectors by 2030.
	Economic Resilience	The value of Australian beef industry products and services doubles from 2020 levels by 2030 resulting in a profitable and resilient industry.
	People & Community	The Australian beef industry is trusted, attractive to a diverse workforce, a source of pride and belonging, and makes a positive contribution to the food security of Australian and international communities.





NEW ZEALAND ROUNDTABLE FOR SUSTAINABLE BEEF

The New Zealand Roundtable for Sustainable Beef (NZRSB) **vision is New Zealand Beef will be recognised as the world's most sustainable beef, continuously improving outcomes that are environmentally sound, economically viable, and socially responsible.** In its third year, several achievements have been made towards that as the NZRSB builds on its mission, that **the New Zealand beef value chain strives together to produce the world's most sustainable beef through strategic, collaborative, co-ordinated and transparent actions.**

The May 2023 Action Plan set high aspirations for the year ahead organisationally and for the Certification Framework and GRSB aligned goals.

ORGANISATIONAL HIGHLIGHTS OF 2023

Organisationally, the NZRSB aspired to increase membership and engagement, establish a communications strategy and promote and support a stronger resilient and more united Kiwi beef community. In 2022 a member gap analysis was carried out, and although total member numbers have not changed the nature of the collective membership has, with an increased breadth of contributors to the industry joining the table and the discussion. This is further reflected in the NZRSB Board make up.

The 2022 AGM secured two additional Board member positions allowing an increase to four Producers and four Allied Services members to sit on the board. Currently, the Board is 12 members strong, with Blake Holgate, Head of Sustainable Business Development, of Rabobank NZ and Jess Blair, Director, of Collaborative Management Consultancy joining in the last month. Over the last twelve months four new individuals are representing existing Board member entities including Alex McGrath, Account Manager at AgResearch, Arnja Dale, Chief Scientific Officer at SPCA, Meredith King, Sustainable Sourcing Manager at McDonald's Australia Ltd and Nicholas Jolly, Senior Trade Policy Advisor at Beef + Lamb New Zealand. And contributing Processor (2) and Producer (4) Board Members and their organisations continue to support the NZRSB, including: ANZCO Foods, Silver Fern Farms, Whangara Farms, Alpine Pastures, Chris Allen and Anthony Darke, respectively. More detail about the NZRSB board members can be found here... <https://www.nzsustainablebeef.co.nz/nzrsb-board>.

NZRSB is working to improve its connection with members by holding online meetings in addition to in person meetings and member communications now include an acknowledgment of support and share the message of organisations delivering this actively in New Zealand communities.

SUSTAINABLE CERTIFICATION FRAMEWORK

The NZRSB continues to progress the recommendations in the Final Public Report from their inaugural project, the New Zealand Beef Sustainability Proof of Concept Project, accessible here: <https://www.nzsustainablebeef.co.nz/news/proof-of-concept-report>. This project successfully demonstrated that sustainable beef could be traced through the supply chain utilising a practical verified sustainable model enabling tracked mass balance reporting to the consumer.

The Certification Framework Project Group is working to progress the activation of a verified sustainable model with processor members collating initial reporting data, considering assurance programme providers and increasing the conversation with key stakeholders to ensure best deliverance of an applicable and efficient framework without producing duplication.



continued on next page

NEW ZEALAND ROUNDTABLE FOR SUSTAINABLE BEEF

New Zealand Roundtable, continued



NZRSB'S ALIGNED GOALS

The most progress made this year is in releasing the first draft of the NZRSB goals and targets aligned with the Global Roundtable for Sustainable Beef and completing the first goals consultation process with members and key stakeholders. NZRSB is halfway to having achieved the 2023 action plan targets set out. The next steps are working through the metrics defined for Climate, Nature Positive and Animal Health & Welfare, reviewing sources and setting baselines ensuring they are both measurable and credible.

Big steps toward these goals include:

- Work carried out by Beef + Lamb New Zealand and member processors through consultation and delivering workshops in conjunction with the He Waka Eke Noa Partnership,
- Beef + Lamb NZ's 2023 Life Cycle Assessment produced in conjunction with the Meat Industry Association and prepared by AgResearch, and
- Member initiatives to introduce emissions reduction programmes and new markets to strengthen the cross-industry value chain between dairy and beef.

In a country where regulation and sustainable rural activity are developing quickly and concurrently, the key achievements this year have been obtained by successful collaborations and the continued growing of relationships throughout the value chain.



May 2023 NZRSB Conference tour to Silver Fern Farms plant.

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.



5 PRINCIPLES AND CRITERIA OF SUSTAINABLE BEEF



Natural Resources

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



Food

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



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.



Efficiency & Innovation

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



Animal Health & Welfare

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

GRSB GOALS

On June 29, 2021, the GRSB announced their commitment to reduce the net global warming impact of beef 30% by 2030 through their three global sustainability Goals: Climate, Animal Health & Welfare and Nature Positive Production.



CLIMATE:

Reducing global warming impact on a pathway to climate neutrality

The GRSB commits to delivering climate action across the beef industry to support the urgent global ambition to limit global temperature rises to 1.5 degrees above pre-industrial levels.

How we're going to get there:

1. Using the best available metrics that recognize short lived gases and sequestration, support the development and implementation of accounting and reporting frameworks.
2. Implement and incentivize climate smart beef production, processing and trade throughout the value chain
3. Safeguard and build upon the carbon stores in soil and landscapes
4. Invest in research and development of climate smart practices, tools and knowledge, to work towards net positive beef production.



ANIMAL HEALTH & WELFARE:
Providing cattle with an environment that they can thrive within

Sustainable beef means providing cattle with a good quality of life and an environment where they can thrive; health and welfare are the major contributors to this. Animal health and welfare are achieved through increased adoption of best practices in disease prevention and treatment measures, cattle handling (e.g., low stress), and appropriate genetics to promote animal health and welfare throughout their life. We must also continue our efforts to minimise morbidity and mortality and focus on achieving measurable improvements. We encourage all value chain partners, from farm to plate, to support and invest in the continuous improvement of cattle's health and well-being.

How we're going to get there:

Increase the percentage of cattle producers and handlers undertaking training in or demonstrating competence in comprehensive cattle care (as defined by the World Organisation for Animal Health) by 25% from the 2020 numbers. Training should be appropriate to caretakers, and the effectiveness of said training should be monitored and assessed. Comprehensive cattle care training is designed to result in continuous improvement in animal health and welfare outcomes to reduce mortality and increase the ability to thrive. Training should also improve outcomes within the five domains of animal welfare; e.g. (but not limited to) ensuring comfort and allowing animals to express normal patterns of behaviour, pain mitigation, and the adoption of best management practices.

GRSB GOALS continued

GRSB members and roundtables will:

- Introduce and promote comprehensive cattle care training in areas around the world where it currently does not exist, ensuring that it achieves all aspects of the GRSB's Principle and Criteria for Animal Health and Welfare.
- Develop (or adopt) research and monitoring systems to track the effectiveness of cattle care training. Research should identify causes of mortality and actions to overcome them to reduce mortality by 10% of their current rate by 2030.
- Encourage all beef value chain partners to support and invest in the continuous improvement of cattle's health and wellbeing.
- Development and implementation of comprehensive cattle care training and evaluation for outcomes-based adoption in line with the World Organisation for Animal Health's terrestrial animal health code and ISO/TS 34700.
- Research and development.
- Promotion and advancing adoption of pain mitigation practices, including where appropriate, use of genetics that contribute to avoidance of painful procedures, such as polled cattle.

The GRSB and its members are committed to producing, financing, sourcing, and supporting practices throughout the entire value chain that are designed to sustain and restore grazing lands, enhance resilience, conserve forests, grasslands, and native vegetation, increase biodiversity, and help reverse ecological decline.



NATURE POSITIVE PRODUCTION:
Ensuring the beef value chain is a net positive contributor

How we're going to get there:

1. Mobilize efforts with the GRSB, its members, and the network of national and regional roundtables to establish metrics and practices (if they don't already exist) that are regionally applicable and can be aggregated globally to effectively measure, track, report, and verify progress and results.
2. Adopt science-based land management practices that improve ecosystem services, maintain healthier soils, generate additional carbon sequestration, promote more efficient water usage, and increase biodiversity.
3. Promote practices that help recover degraded pastures, improve productivity, and increase resilience.
4. Eliminate illegal deforestation and illegal conversion, as fast as possible.
5. Increase the production, financing, sourcing, and recognition of beef that does not contribute to additional deforestation, conversion, or degradation of native ecosystems.
6. Improve traceability, transparency, and the availability of relevant information throughout the value chain.
7. Foster meaningful incentives for producers and other actors in the value chain to help catalyze action, spur innovation, reward progress, and promote continuous improvement.

SAVE THE DATE!

GLOBAL CONFERENCE ON
SUSTAINABLE BEEF



PROOF POSITIVE:
Reporting Global Beef Sustainability

September 30-October 4, 2024
Punta del Este, Uruguay

ADDITIONAL DETAILS COMING SOON.



ANIMAL HEALTH
AND WELFARE



CLIMATE



NATURE POSITIVE
PRODUCTION



GLOBAL ROUNDTABLE FOR
SUSTAINABLE BEEF



MUCS
MESA URUGUAYA DE
CARNE SOSTENIBLE



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