
Walking the Talk: Accelerating the transition to a sustainable food system and regenerative agriculture per the EU Farm-to-Fork Strategy

Executive Roundtable Summary

Virtual Conference – July 13, 2021

Background

Collective action is necessary to transition towards a truly abundant, regenerative, and equitable farming system that complies with the Paris Agreement, UN Sustainable Development Goals, and the goals that Europe has set for itself in the Green Deal by 2030. Several top-down global initiatives are coming together, such as the UN Food systems summit and Regenerative Acceleration and Change Engine (RACE) for Nature Positive Farming. WEC's Roundtable series seeks to create a space for bottom-up conversations on what the European Food & Agriculture sector explicitly needs to thrive. The aim of this 2nd event was for participants to collaborate and debate problem statements that could help inform businesses' broader approach and scale initiatives. It brought together 37 senior sustainability, procurement, and government affairs executives from thirteen countries – with 43% from large food companies and commodity traders, 32% from academia/NGO/agronomic service providers, 19% farmers, and 5% government.

Participants

Host

Petra Laux, Acting CSO, Syngenta



Moderators and small group facilitators

- **Progressive Agriculture Services:** Charlie Curtis
- **Suseco:** Louise Nicholls
- **World Environment Center:** Glenn Prickett and Frank Werner

Speakers

- **COPA COGECA:** Daniel Azevedo
- **EU Mission Soil Health Project:** Carmen Vela
- **Rabobank:** Dirk Jan Kennes
- **SAI Platform:** Adrian Greet
- **Wageningen University:** Corné Kempenaar

Key Points

- (1) An introductory poll** revealed that almost 2/3 of the participating companies have defined their regenerative agriculture programme and are either piloting implementation or are already advanced in implementing at scale. 16% are planning to embrace regenerative agriculture, while one in five of participating companies are new to the topic of regenerative agriculture and lack a transition plan. The poll's remarkable result shows that regenerative practices are already widely accepted at least in this group of companies and farmers.
- (2) The EU Commission's Horizon Mission Soil Health Project is the EU's body that advises decision-making at EU-level with respect to the Farm-to-Fork strategy.** Based on insight from 60+ stakeholder events and input from academia the mission has recommended a target of 75% of the EU's soils to be in a healthy state by 2030. It defines healthy soils as a reduction of land degradation, soil sealing and pollution strengthened soil structure to prevent erosion and enhanced habitat quality for soil biota, as well as soils that can conserve carbon and enhance restoration.

The mission identifies the latter should be achieved by reducing the use of pesticides by 50%, the use of fertilizers by 20% and by cutting nutrient losses by at least 50%. To reach the EU's goals and to keep

Walking the Talk: Accelerating the transition to a sustainable food system and regenerative agriculture per the EU Farm-to-Fork Strategy

Executive Roundtable Summary

Virtual Conference – July 13, 2021

EU farmers competitive, [the Mission's recommendation to the EU Commission](#) is also to reduce the EU's global footprint by 20-40% from imported food and timber. Within the EU, organic farming should make up 25% of all farmed land. With respect to the remaining 75% of farmland, it should be transformed but no specific technology is recommended. What is planned across Europe is on the ground Living Labs" experimentation and scaling lighthouse examples of innovative best practice. Regenerative Agriculture seems to be a preferred option for business, given the poll results in this event and discussions during [WEC's Roundtable on March 30, 2021](#).

- (3) According to independent evaluations the EU has kick-started a change in the European Food system to **evolve agriculture from a concept of exploiting natural resources towards a concept of conserving them. Financial markets are now in a position to support this step** when allocating capital based on integrating non-traditional economic parameters (commonly known as externalities) that will increase the cost of traditional production. Innovation may help to keep these cost raises moderate.

There is scepticism that other world regions (especially if they are experiencing less pressure to make a transition, e.g. the large agricultural exporters such as Australia, Brazil, and the US) will abandon their economic advantages to follow the EU paradigm shift. This risks the EU region and associated countries potentially becoming a closed agricultural market that is dependent on taxpayers' subsidies and at risk of losing export markets. The EU's similarly ambitious path at the end of the 1990s to phase out the use of antibiotics in livestock farming, highlights previous EU bold decisions the reality wasn't as feared. In the case of reduced Antibiotics, companies' rose to the innovation challenge, so export markets did not lose their competitiveness. So perhaps the concerns are unnecessary, and these uncertainties can be considered and well-managed.

- (4) **There is not yet a definition of "Regenerative Agriculture"**, that is commonly agreed and recognized due to the fact, that different stakeholders have different needs and different approaches. One suitable definition brought up in a SAI Platform conference 2021 by [AlVela](#) has been recommended: *"Regenerative Agriculture goes beyond Organic Agriculture, it includes restoring soils, harvesting water, recovering biodiversity and rebuilding community. We need policies that allow ecology and economy to go hand in hand."*

The Breakout MURAL small group discussions revealed two key challenges: (1) How to engage so many stakeholders to make them understand what the term means and (2) not overcomplicating the topic so we lose sight that soil is the most important resource.

Participants debated certification/validation may be crucial to communication (as demonstrated successfully by the organic products over the past years) but adding cost and not impactfully changing practices. Core is to focus on farmer needs, engagement, and training to make it easier to make the changes and report the progress.

Further important statements from the breakout sessions (all statements available in a separate doc.):

- The need for speed: good intent – trying to involve everybody and anything – will slow the speed.
- Unclear communication: different language and understanding of the terms being used

Walking the Talk: Accelerating the transition to a sustainable food system and regenerative agriculture per the EU Farm-to-Fork Strategy

Executive Roundtable Summary

Virtual Conference – July 13, 2021

- OPPORTUNITY: Use a common metric “Increase Soil Carbon” as a tool in the current race to zero carbon
- *Sources of good practice:*
 - [Organic Research Centre](#) (learn from organic)
 - [SAI Platform](#) (look at Regenerative Agriculture projects, definitions, and practical actions)

(5) Reducing farmers’ risks in the transition has been identified as one major element for success. As farmers have only 30 harvests in their professional career, they risk a lot changing their practice. Risk is about yield, investments made, time allocated to training, etc. Farmers ask for a return in the market, services/products provided by value chain partners to make necessary investments, access to a wide range of technologies, suitable infrastructure (e.g., for data transfers), as well as a consistency between policies (e.g., trade and the Green Deal).

The Breakout MURAL small group discussions revealed that sharing knowledge and practical tools, including ‘farmer’ experiences with innovative solutions and data insight is key to reduce perceived risk for farmers. Furthermore, the food value chain is being incentivized by carbon markets to reduce companies’ carbon footprint from farm to fork. With raising expectations and more opportunities it is expected that food-producing and trading companies will add more programs to help farmers make the transition.

Further important statements from the breakout sessions (all statements available in a separate doc.):

- Fear the market and consumer will not pay for the cost of this transition
- Short term supply chain management systems
- Lack of tools available to replace the current tools farmers are losing
- Role of Agri-cooperatives/buying clubs in accelerating transition, knowledge sharing and cooperation among farmers
- Not all imports of agri-food products follow EU standards at farm level. Green Deal will increase the gap of standards between farmers
- OPPORTUNITY: Many brands (food & FMCG) have public commitments which need regenerative agriculture to deliver. Growing carbon credits markets. Engagement and transition would be higher if there was greater financial support and longer-term partnerships across the value chain.
- *Sources of good practice:*
 - [Landscape Enterprises Networks](#) (LENs) (some companies use this approach to finance the transition)

(6) Accessible & reliable data freely flowing across systems is key to drive innovation – be it in proving the value add of specific regenerative agriculture farming practices or identifying the break-even point given specific change in operations. At the same time business partners in the value chain use data to monitor crops, soils, climate, etc., benchmarking, report to authorities and value chain partners, and for optimization purposes, e.g. smart farming. Even if digitized the data is generally stored in many different places and run by organizations with their own research/business interest, which makes it extremely complex for farmers to access the data. A single data platform with all data added is currently not available, partly due to the fact, that many farmers fear the data may be used against

Walking the Talk: Accelerating the transition to a sustainable food system and regenerative agriculture per the EU Farm-to-Fork Strategy

Executive Roundtable Summary

Virtual Conference – July 13, 2021

them. A solution may be a maturing of a single data platform accessible by the farmers and a connection between the farmers' data platforms and other portals in the value chain.

The breakout MURAL small group discussions revealed that farmers are not motivated to populate data requests when they do not gain anything for it. Especially when the data platforms are not intuitive, not adapted to the farming environment and time consuming to interact with. Greater focus needs to be placed around understanding the farmers' needs, ease of use, reducing data duplication, accelerating data sharing and pre- and post-sale communication. For the benefit of everybody it is key to have a simple and realistic approach.

Further important statements from the breakout sessions (all statements available in a separate doc.):

- Farmers' data spaces are immature. Lack of clarity on what is the right/ relevant data to collect.
- Lack of farmer engagement and lack of record keeping culture/tools. Not designed with farmers.
- Multiple platforms, duplicate/similar functions.
- Access to the internet is suboptimal in many regions.
- Poor aftersales support and lack of training: Often salespeople lack training to provide expert practical support. Farmers more hesitant because previous poor/costly experience
- OPPORTUNITY: Accelerate more data coordination among the many actors.
- *Sources of good practice:*
[EIP project Farming with Nature/BRIDE in Ireland](#), developing a data collection platform for biodiversity on farms

Note: WEC Executive Roundtables are conducted under the Chatham House Rule. This summary takes up discussions of the 2nd event in a series of business discussions about how to successfully implement the EU's Farm-to-Fork strategy.

A separate document takes up the individual statements participants anonymously provided in small group MURAL breakout sessions.