This two-day conference has a particular focus on the commercial opportunities for the implementation of sustainability and ethical initiatives in the sugarcane supply chain. Organised in partnership with Bonsucro, it is designed to bring together a diverse group of stakeholders and give them the opportunity to discuss and debate the key issues and challenges facing the industry through an interactive, engaging and practical format.

**Key insights to take back to the office:**

- A holistic view of the state of the sugarcane industry, and the actions needed to drive sustainable, positive progress
- Insight into the impact of the European sugar quota for both producers and brands
- Clear guidelines around how companies can develop and implement sustainable sugar strategies throughout supply chains

**Critical issues that will be discussed:**

- **Transparency and traceability:** understand your value chain through mapping to analyse where the risks and opportunities are
- **Human rights:** implement programmes for continuous improvement, remove human rights risks and infringements on land rights, and eliminate child and forced labour
- **Smallholder farmers:** understand the best practices that improve productivity and yield, and benefit the livelihoods of smallholders
- **Environmental pressures:** information on proactively preparing sugar production for future and issues such as loss of biodiversity, climate change and water scarcity
- **Biofuels and ethanol:** Insight into the increase in demand and what this means for sustainability in the industry

**Hear from these leading experts:**

- Ben Jordan, director of supplier sustainability, The Coca-Cola Company
- Dave Pendlington, sustainable sourcing manager, Mars
- Diane Stevenson, director of sustainability, CSC Sugar
- Géraldine Kutas, head of international affairs, Unica
- Iver Drabaek, head of sustainability, Nordzucker AG
- Michel HR Santos, director, global sustainability, Bunge
- Patrick Mallet, director, innovations, ISEAL Alliance
- Rob Meyers, sustainability director, global agro operations, PepsiCo
- Simon Usher, chief executive officer, Bonsucro

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A reform of European Union sugar beet quotas, which will take effect on 1 October 2017, has set alarm bells ringing over the impact it might have on smallholders in developing countries.

The reform will involve the scrapping of the current EU annual production quota for sugar for food use, which stands at 13.5m tonnes. A 1.4m tonne export limit is also being done away with. The EU will therefore be able both to produce more for its own market, and sell more to other economies.

The likely effect, according to Ruud Schers, an analyst at Rabobank, is that EU sugar production will rise by about 15%. This would take EU production to a level that is more than enough to meet the continent’s demand – and is thus expected to disrupt the EU’s imports of sugar.

### 200,000 into poverty?

The Fairtrade Foundation has previously raised the issue of the impact this could have on farmers in poor countries saying that the quote changes could plunge 200,000 people into poverty.

Currently, a wide range of poorer countries export sugar to the EU on preferential terms, but their farmers could lose out if there is a flood of cheap sugar from EU producers that themselves receive subsidies under the EU’s agricultural policies.

For sugar-using brands, the changes raise a question: what, if anything, do they need to do to ensure that any negative impacts on smallholders in developing countries are minimised?

### Less of a minefield

In fact, it is unclear if the EU sugar reforms will be a major ethical and sustainability minefield for brands.

Although the EU in principle will from 2017 be able to meet its own sugar demand, EU-based cane refiners will continue to import raw sugarcane. However, according to Schers, EU beet sugar producers that previously refined sugarcane off-season will no longer need to limit their production of sugar from beet and will likely switch to year-round processing of beet. EU sugar imports from poorer countries may therefore fall.

Exporting countries, meanwhile, especially those in sub-Saharan Africa, which are the main suppliers of raw sugar to the EU, will need to find alternative markets closer to home.

Sub-Saharan Africa already sells 82% of its sugar to local markets or markets other than the EU, and demand in those markets is growing – in fact, sub-Saharan Africa consumes more sugar than it produces. So, smallholders should be able to sell their cane.

### The certification solution

Nevertheless, suppliers in poorer countries could lose out because they might not receive the higher prices that are generally available when selling to EU buyers.

A possible strategy in response to this could be sustainability certification. Demand for sustainable sugar from western brands is growing, but only 3.8% of global sugarcane production is certified sustainable, according to Bonsucro.

Sustainable sugar demand is underpinned by pledges from major brands, Coca-Cola, Ferrero, Pepsico and Unilever, for example, must all ramp up their sustainable sugar purchases because they have committed to only buying sustainable sugar by 2020. For Bacardi, the target date is 2022.

Brands can keep their promises by helping more smallholders achieve sustainability certification – which can be a daunting process. Meanwhile, smallholders must hold out in the hope that the higher productivity and better quality that sustainability can bring will help achieve higher prices to offset any loss from the EU quota changes.
Welcome remarks from Innovation Forum

Sugar markets in flux: abolition of European quotas and the big supply chain impacts

With production in 2014/15 of 19m tonnes of refined product, the European Union is currently the world’s biggest producer of beet sugar. It’s also the principal importer of raw cane sugar for refining. The EU sugar market has been regulated by production quotas, a minimum beet price and trade mechanisms – so the abolition of sugar quotas in 2017 will have implications across the commodity’s global supply chains.

Cane producers in Africa, South America, the Caribbean and Asia face the challenges of exporting to a market that’s already self-sufficient in sugar, and where buyers increasingly demand clear environmental and social commitments and transparency. The incentives for cane producers to engage in a changing European market are themselves in flux.

In this opening session, we will assess the impacts of the EU quota abolition on global sugar supply, and focus on how sustainability commitments can help provide route to market for cane producers.

• The key elements in the post 2017 sugar industry, and the impacts of the European market changes.
• How cane industry players are responding, and what they should do better.
• The impacts of large manufacturers competing with smallholders.
• How the increased exposure will affect international competition.

We will ask producers from developing markets to showcase their plans for post 2017 and how end users can help. Leading European sugar industry representatives will also analyse how the change will affect both EU domestic production and imports from the cane producers.

How company strategies on sustainable sugarcane are evolving – and where they should improve

In this interactive Q&A based session, we’ll ask representatives from leading companies in key sugarcane growing areas to explain their headline approaches to sustainability strategy and to focus on a particular region.

Our moderator will lead a debate on the lessons learned from other sectors across different regions, and draw out the important lessons from our speakers and attendees. We’ll be asking audience members for critical constructive feedback on what they hear, and have seen on the ground.

Areas we’ll be asking about will include:

• Government engagement, both national and regional. How can better lasting relationships be created and nurtured for systemic positive change on the ground / around plantations?
• Current financial pressures on budgets, how are companies making an effective business case to ensure implementation and therefore supply chain resilience? We’ll debate some hard numbers and examples.
• NGO partner engagement – how can companies better build partnerships with NGOs and local state agencies to help with local capacity building? We’ll debate the transferable lessons.
• Beyond Brazil. The country often seems to be the main source of innovation. With other regions doing interesting work in this area, which key lessons can Brazil learn from the Caribbean, and Africa, for example? We will discuss.
• Critical feedback from NGOs. Are the key issues being addressed, and where do those outside companies see the hotspots in the future as the industry expands and changes?
Breakout sessions

**Focus: environment**

**Environmental supply chain challenge: Are companies on track to reach their water targets?**

Water scarcity is one of the major environmental challenges that sugar producers face. This session will discuss the strategies and practices for improving water management with large producers.

**Focus: social**

**Social supply chain challenges: decent work and occupational health**

There are various occupational health issues which arise from low paid agricultural work in cane cutter areas. What do we know about these issues? And what are the risks of not acting on them? We will hear from experts in the field on how to manage these issues on the ground.

**Focus: social**

**Social challenges: land rights and responsible investment**

Land ownership is another complex problem with many contentious issues. Companies can be critically affected by hard-to-solve land use conflicts. We will discuss the benefits of supporting more investment in responsible agriculture and hear from sugar sector companies on the challenges and successes of FPIC implementation.

**Focus: technology**

**Traceability technology that actually works at scale**

Traceability is a term thrown around in sustainability constantly. But what does it mean for business improvements when new technologies are added into the mix? We’ll look at how technology solutions are helping companies NOW, to deliver on their traceability commitments. We’ll also explore the limits of technology on the ground, and what can be done to overcome them when time and resources are tight.

Closing discussion

**Unpicking the challenges of collaboration and putting strategy into practice – two corporate experts on the spot**

To close day one, we will examine how corporate sugar sourcing strategy is developing in light of improving sustainability practices and how companies are (a) innovating to develop a sustainable value chain and, crucially, (b) what this actually means in practice. In two one-on-one town-hall style question and answer sessions running back-to-back – with one buyer-brand and with one processing company – we will analyse in depth how a successful sustainable sourcing strategy translates into everyday work. And we will focus on how to identify the right strategic partners that turn well-meaning policy into actual bottom-line benefits.

- The strategic approaches that gain traction internally, and engage external suppliers on the benefits of change that mean better productivity.
- Turning talk into action – the key drivers that push innovative improvements into the supply chains.
- Partner organisations are frequently essential to complete the necessary skills to achieve success. How do leading companies identify them and work with them for mutual benefit?

These will be interactive sessions, and delegates will have the chance to submit questions that the session moderators will put the corporate experts during the session.

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Day one: Thursday 1st December 2016
COP21 outcomes and sustainable sugar: Will ethanol production go truly global?

Companies are facing pressures to create strategies post COP21 that demonstrate their commitment to tackling climate change. Biofuels, and ethanol from sugarcane are going to be a big part of the mix. 36 countries specifically referred to the use of biofuels in their Intended Nationally Determined Contributions (INDC), as part of their action plan to mitigate climate change. India, the third highest CO2 emitter in the world, says it has a 20% blending target for biofuels, including biodiesel and ethanol.

So, big changes are ahead. What will this mean for a more diverse and sustainable supply in the coming years?

We’ll discuss whether Brazil can maintain its current production advantage and how soon Asia and perhaps Africa will offer serious competition. Will their production be as sustainably produced?

According to UNICA: “Experts estimate that sugarcane bioelectricity could reach 177,018GWh by 2023 if all potential sources are fully developed. That would be enough energy to cover 23% of Brazil’s electricity needs or, looked at another way, it could power Sweden and Portugal together.”

Can this be done sustainably, and what will it mean for global producers and brands seeking to buy lower carbon energy sources into their value chains?

Investing for change – how to position your company to benefit from this

Supply chains can’t be developed without proper investment into the right projects and programmes that generate long-term value across the supply chain at scale. This can require a combination of financing sources – from commercial banks, development institutions, social investors and brands themselves – and the right associated expertise that successfully delivers.

In this session we will analyse the perspectives of sugar buyers and investors on the future demand trends for sustainable sugar, and how they will be funded.

We will ask a funder, a social investor and an FMCG company to explain what projects they put money into and what returns on investment they look for.

We’ll look at the trends, with focused input from industry experts, who’ll address:

- Where buyers are investing effort, and cash, into developing sugar sustainability.
- How financing for successful projects can be structured, and what can be learned from existing examples.
- The do’s and don’ts around financing that are specific to the sugar

Beyond certification and its limitations – will traceability overtake voluntary schemes?

Two things are beyond doubt. First, certification schemes provide value, yet struggle for scale. Second, technology innovations are powering ahead and driving traceability. But will the two become more intrinsically linked in the next few years?

We’ll discuss whether companies across agriculture and in other sectors are scaling technology solutions and where, and the impact this is having, and will have, on their supply chains. We’ll also discuss whether, as companies seek direct traceability and are investing in that, such investments will mean less focus on external certification and more on values based internal and bespoke supplier systems.

Day two: Friday 2nd December 2016
Breakout sessions

**Focus: technology**  
**Smallholder impact and communications technology**

There is increasing need to scale investment for productivity and sustainability for smallholders and the industry is seeing progressive developments taking place through innovations in technology. This session will look at some of these developments and we will ask questions such as:

- What are these innovations? Can or have they worked for smallholders?
- How do we get tech beyond big agribusiness and into smallholder farms?

**Focus: technology**  
**What are the impacts from mechanisation on productivity and sustainability: the viable solutions**

There are various barriers to the increased uptake of mechanisation. This session will discuss what the potential is, how companies can mitigate the associated social risks and where the challenges lie. We will also debate what successful investment in less developed regions could look like.

**Focus: sustainable supplier communities**  
**How to you create empowered smallholder communities**

A vibrant industry can only be based on productive and resilient farming. What does this mean in practice and how do leading companies achieve this in smallholder-based production systems?

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**Key business case takeaways**

This concluding session will look at some key, easy to communicate, lessons and solutions from the conference to take back to your company, board and CEO. This digestible information can be used to explain a quantifiable commercial case for the benefits of sustainable sugarcane and to justify your requested budgets. We will also ask three industry experts what they learned, the changes they want to see the industry focus on, where we should be by this time next year. Finally, we will debate the future targets we should be striving to achieve.

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**Speakers include:**

- Ben Jordan  
  director of supplier sustainability  
  **The Coca-Cola Company**
- Dave Pendlington  
  sustainable sourcing manager  
  **Mars**
- Diane Stevenson  
  director of sustainability  
  **CSC Sugar**
- Géraldine Kutas  
  head of international affairs  
  **Unica**
- Hannah Rizki  
  research associate  
  **ED&F Man**
- Harsh Vivek  
  operations officer, advisory services  
  **International Finance Corporation**
- Michel HR Santos, director, global sustainability  
  **Bunge**
- Abhishek Jani  
  CEO  
  **Fairtrade**
- Iver Drabaek  
  head of sustainability  
  **Nordzucker**
- Jason Glaser  
  CEO, president  
  **La Isla Foundation**
- Jenny Edwards  
  project manager  
  **Sustainable Agriculture Initiative Platform**
- Edward Millard  
  director, asia pacific, landscapes & livelihoods  
  **Rainforest Alliance**
- Rob Meyers  
  sustainability director  
  global agro operations  
  **Pepsico**
- Jonathan Kingsman  
  chairman of the board  
  **Bonsuco**
- Lena Staafgard  
  chief operations officer  
  **Better Cotton Initiative**
- Martin Sneary  
  programme director  
  **International Union for Conservation of Nature**
- Maximiliano Camiro Vázquez  
  legal director  
  **National Chamber of Sugar and Alcohol Industries, Mexico**
- Patrick Mallet  
  director, innovations  
  **Iseal Alliance**
- Paulina Villalpando  
  executive director  
  **High Conservation Value Network**
- Prashant Pastore  
  senior programme manager  
  **Solidaridad-South & South East Asia**
- Scott Poynton  
  founder  
  **TFT**
- Simon Usher  
  chief executive officer  
  **Bonsuco**
- Sven Sielhorst  
  director global programmes  
  **Bonsuco**
- William Roak  
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- How business can tackle modern slavery and forced labor – 17th October, Washington DC
- How business can engage smallholder farmers – 19th-20th October, Washington DC
- How business can better manage human rights risks – 24th-25th October, London
- Sustainable seafood supply chains – 15th-16th November, London
- Innovation for sustainable agriculture – 17th-18th November, Washington DC

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