

# ONE VOICE



# WE HAVE ONE VOICE

**The plant science industry helps millions of farmers grow their crops every year. From Asia to Africa and from Europe to the Americas, plant scientists are developing plant biotechnology and crop protection products to advance sustainable and productive agriculture to ensure global food security.**

CropLife International's unique strength is in uniting the plant science industry to speak with one voice and champion the role of these agricultural innovations and products on the international stage. This 2014 annual report demonstrates where CropLife International has assembled a network of members, partners and allies to promote the essential role of plant science in global agriculture.

It was another impressive year for plant biotechnology products as a record 18 million farmers grew biotech crops across 28 countries worldwide. CropLife International sustained its vital work in this area supporting its network in 49 countries to share the benefits of plant biotechnology enjoyed by farmers, the environment and society. More than 16 million smallholder farmers grew biotech crops in developing countries, a testament to the scale-neutrality of the technology. This past year also saw Bangladesh become the newest biotech-growing nation as it planted the world's first commercial biotech eggplant which is resistant to insect attack.

CropLife International also expanded its strong relationships with stakeholders across the agriculture and food value chain to ensure farmers have access to crop protection products. Every farmer on the planet must deal with the threat of pests, weeds and diseases to the health of their crop and harvests, and without crop protection, food production would be decimated. CropLife International is equally committed to ensuring that farmers use products responsibly, and we are proud of our continued work with partner organizations across every continent to train more than 300,000 farmers in 2014.

Another key area for CropLife International in 2014 was engagement with high-level intergovernmental

platforms, such as the United Nations Food and Agriculture organization (FAO) and the UN Committee on World Food Security, to ensure that global voluntary frameworks are based on science and will give farmers access to crop protection and plant biotechnology products. One of the greatest challenges of this millennium will be to feed a global population set to grow by two billion by 2050, and an essential role of the plant science industry is to equip farmers with the tools to do this.

**Together, with one voice, the plant science industry can make a difference.**



**Howard L. Minigh**  
President & CEO  
*CropLife International*



**Markus Heldt**  
Chairman of the Board of Directors  
*CropLife International*

## Contents

**04** Crop Protection Global Market Performance

**05** Plant Biotechnology Global Acceptance

**06** Increasing the Global Acceptance of Plant Science

**08** Increasing the Global Acceptance of Crop Protection

**10** Increasing the Global Acceptance of Plant Biotechnology

**12** Promoting the Responsible Use of Crop Protection and Plant Biotechnology

**14** Promoting the Contribution of Plant Science to Sustainable Agriculture

## The Global CropLife Network

CropLife International is a global federation representing the plant science industry. It supports a network of regional and national associations in 91 countries, and is led by companies such as BASF, Bayer CropScience, Dow AgroSciences, DuPont, FMC, Monsanto, Sumitomo and Syngenta. CropLife International promotes the benefits of crop protection products and plant biotechnology, their importance to sustainable agriculture and food production, and their responsible use through stewardship activities.



## Member Companies

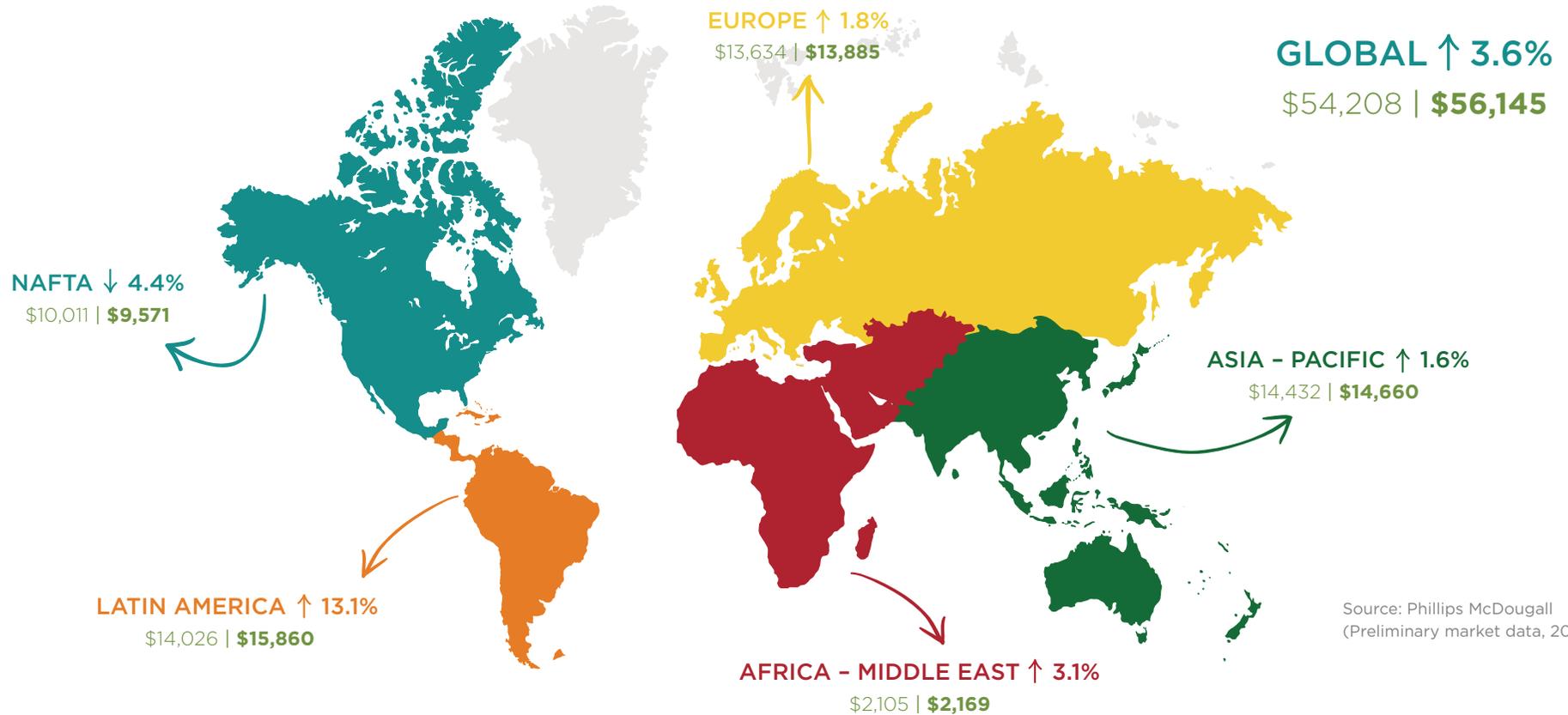


# Crop Protection Products

## 2014 Global Market Performance

In 2014, the global crop protection market grew by 3.6% as world population and demand for food continued to grow. For the second year running the most significant growth took place in Latin America, while weaker crop prices slowed growth in other markets.

CROP PROTECTION MARKET GROWTH (% Growth):  
2013 SALES (\$M) | 2014 SALES (\$M)



Source: Phillips McDougall  
(Preliminary market data, 2014)

## Notable Impacts on the Crop Protection Market in 2014:

↑ Sustained food demand in Asia's developing economies  
**ASIA**

↑ Strong Brazilian farm economy  
**LATIN AMERICA**

↓ Declining crop prices  
**EUROPE**  
**NAFTA**  
**ASIA**

↓ Weakening market in the U.S.  
**NAFTA**

# Plant Biotechnology

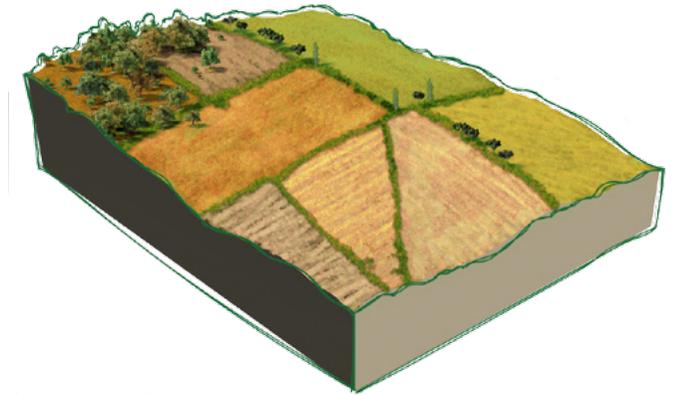
## 2014 Global Acceptance

In 2014, more farmers grew biotech crops than ever before as the technology recorded its 18th consecutive year of growth. For the third straight year, developing countries grew the majority of biotech crops, demonstrating the technology is scale-neutral and brings economic and environmental benefits to all farms.



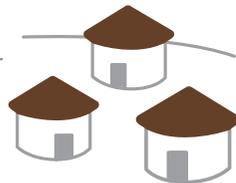
18 MILLION FARMERS

IN 28 COUNTRIES



PLANTED  
181.5 MILLION HECTARES  
OF BIOTECH CROPS

90 percent of biotech farmers are smallholder farmers in the developing world.



Bangladesh became the newest biotech growing nation with biotech brinjal.

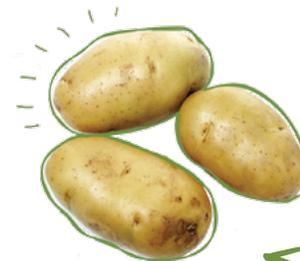


Over 2/3 of the world now lives in countries growing, eating or importing biotech crops.



## LOOKING AHEAD:

Vietnam and Indonesia will plant biotech crops in 2015, and Indonesia will grow the world's first drought-tolerant sugarcane.



U.S. farmers will plant new biotech potatoes that reduce food waste.

A woman is shown in profile, facing left, wearing a vibrant pink headscarf with intricate silver and white embroidery. She is also wearing a colorful, patterned top with floral motifs in red, green, and yellow. The background is a soft-focus field of tall green grass. The overall mood is serene and natural.

# INCREASING THE GLOBAL ACCEPTANCE OF PLANT SCIENCE

una voz

一个声音 ÉÉN STEM

## Engaging in World Food Security

**CropLife International is a founding member of the International Agri-Food Network (IAFN) which played a significant role at the UN Committee on World Food Security (CFS) in 2014.**

As part of the largest private sector delegation to ever attend CFS, CropLife International was at the forefront of the discussion on food security and the role of plant science technologies in finding sustainable solutions to fight hunger. One key achievement at CFS was the endorsement of the voluntary Principles for Responsible Investment in Agriculture and Food Systems (RAI), which will provide a global blueprint for agricultural investment practices around the world. CropLife International engaged with the United Nations Food and Agriculture Organization, member states, civil society members and other relevant stakeholders to voice private sector concerns and promote an acceptable set of voluntary RAI principles.

## Influencing Sustainable Development Goals

**The views of the private sector are being increasingly heeded as the United Nations crafts the voluntary Sustainable Development Goals (SDGs) which will succeed the Millennium Development Goals (MDGs) when they expire in 2015.**

CropLife International engaged in each monthly negotiating session hosted by the UN Open Working Group on the SDGs which will set the global agenda to drive poverty alleviation and international development to 2030. Food security, improved nutrition and sustainable agriculture are high priorities for the UN, which has set a goal to double agricultural productivity by 2030. CropLife International worked closely with the International Chamber of Commerce, which is the principle interlocutor for business and industry, to call on leaders to give farmers access to crop protection and biotech crops to sustainably increase their production.

## Farming First Coalition Continues to Grow

**The Farming First coalition continued to grow and promote sustainable agricultural development worldwide.**

CropLife International is an active member of the coalition which is supported by 154 organizations representing the world's farmers, scientists, engineers and industry as well as agricultural development organizations. Farming First's prominent profile enables it to build consensus and drive awareness of agriculture's crucial role within sustainable development and call on decision-makers to embed a farmer-centric and science-based approach into their policy to drive a prosperous agricultural sector.

# INCREASING THE GLOBAL ACCEPTANCE OF CROP PROTECTION

ОДИН ГОЛОС  
UNA VOZ  
SAUTIMOJA  
UNE SEULE VOIX  
一个声音

## Ensuring Access to Crop Protection Products

**CropLife International and its members are dedicated to the protection of human health and the environment, while providing effective crop protection products for farmers to increase agricultural productivity.**

In 2014 CropLife International members agreed to engage a step-by-step approach to highly hazardous pesticides (HHPs) based on risk and science-based use assessments. CropLife International invited the FAO and other stakeholders to join in endorsing and implementing this approach in place of hazard-based criteria which do not take into account intended uses or actual risks. The approach to HHPs is part of CropLife International's overall commitment to work constructively with international organizations to ensure the responsible use of its products around the world so farmers can maintain and improve their production.

## Advocating Science on Endocrine Disruptors

**CropLife International helped formulate a critical response to a joint report from the World Health Organization (WHO) and United Nations Environment Programme (UNEP) entitled the State of the Science of Endocrine Disrupting Chemicals.**

The response urged policy makers to support science-based regulation. CropLife International also continued to play an important role as a private sector representative to the United Nation's

voluntary Strategic Approach to International Chemicals Management (SAICM).

It is through these high level platforms that CropLife International brings the industry together to advocate an environment that maintains farmer access to plant science technologies.

## Supporting Anti-Counterfeit Projects

**The global trade in counterfeit pesticides undermines the high production standards held by the crop protection industry.**

This threatens the development of legitimate products which are essential to achieving global food security. CropLife International therefore focused on long-term solutions to ensure the unacceptable risks of producing and using counterfeit products are understood, with particular emphasis on China. Here CropLife International worked with CropLife Asia and CropLife China to initiate anti-counterfeiting training for Beijing-based international customs officers to support the strict export regulations of China's agriculture ministry.

CropLife International also continued to engage with key anti-counterfeiting programs, from bodies such as the Organisation for Economic Co-operation and Development and the United Nations, to ensure farmers use only legitimate products that adhere to strict regulatory standards.

## Progressing the Conversation on Pollinators

**The health of pollinating insects, in particular honey bees, continued to be an important topic in 2014.**

The crop protection industry recognizes the vital role pollination plays in agriculture and CropLife International equipped its global network with scientific and communication resources to encourage a balanced discussion with regulators that acknowledges the numerous factors that affect honey bee health, including pests and diseases, management practices and the weather.

*CropLife International advocates for risk-based and science-based decisions to maintain farmer access to technologies.*

CropLife International also demonstrated the industry's commitment to promoting good stewardship among farmers and improving seed applications to reduce the potential for exposure from crop protection products. Together the industry showed its commitment to work in partnership with farmers for sustainable increases in productivity while protecting pollinators.

A wide-angle photograph of a lush green agricultural field, likely corn, stretching towards a horizon under a dramatic sunset sky. The sun is low on the right, casting a warm, golden glow over the scene. The rows of crops are neatly spaced and recede into the distance, creating a strong sense of perspective.

# INCREASING THE GLOBAL ACCEPTANCE OF PLANT BIOTECHNOLOGY

## A Global Voice for Plant Biotechnology

**CropLife International equipped the plant biotech network, which is active in 49 countries, with facts and figures on high profile issues.**

Included were papers on New Breeding Techniques, environmental risk assessments and stacked trait technology. The goal is to enable the industry to speak in a single, consistent voice to form a constructive dialogue with stakeholders and international policy makers to unlock the global potential of plant biotechnology.

*The goal is to enable the industry to speak in a single, consistent voice.*

A major strength of CropLife International is its ability to work collaboratively with like-minded partners. For example in 2014 CropLife International worked closely with a coalition of groups on the Africa Biosafety Coordination Initiative, which aims to support the effort of African governments to give their farmers access to plant biotechnology.

## Benefits of Intellectual Property

**Through the IP52 initiative, CropLife International created a range of resources in 2014.**

These resources will help policy makers, stakeholders, and the general public understand the importance of intellectual property (IP) rights.

The campaign site [www.IP52.org](http://www.IP52.org) released videos, infographics and case studies every week to explain how all industries — from pharmaceuticals to automobiles to tech products to agriculture — need IP to encourage innovation.

*A major strength of CropLife International is its ability to work collaboratively with like-minded partners.*

CropLife International also contributed to a EuropaBio study “Who benefits from intellectual property rights for agricultural innovation?” which found 80 percent of economic benefits from an agricultural innovation – which is made possible through IP protection – accrue to farmers and consumers. These resources explain why the regulatory environment must encourage the plant science industry to invest in sustainable solutions for agriculture.

## Working Together to Facilitate Trade

**China is one of the world’s largest agricultural markets, but it remains challenging for many industries to access for trade.**

CropLife International has supported the plant science industry on trade-related issues with China including a North Asia Task Force to advocate for predictable, transparent and timely approvals of products there.

CropLife International also continued to lead the efforts of the Global Alliance for Ag Biotech Trade (GAABT), a “farm to fork” coalition which brings different parts of the agricultural value chain together to seek practical solutions on trade-related issues. GAABT tackles issues such as asynchronous approvals and low-level presence (LLP) to help facilitate global trade of agricultural biotech products.

## Supporting the Convention on Biological Diversity

**CropLife International played a key role coordinating its network and managing the Global Industry Coalition (GIC) to engage in the Cartagena Protocol on Biosafety.**

The Protocol, which falls under the United Nations Convention on Biological Diversity, governs trans-boundary movements of living modified organisms (LMOs) resulting from modern biotechnology.

CropLife International helped progress a number of topics on the Protocol to ensure the protection of biological diversity, while maintaining uninterrupted international trade. CropLife International also worked closely with the global seed industry to raise private sector concerns during discussions on Access and Benefits Sharing (ABS) in the framework of the Nagoya Protocol, national implementing regulations and on the International Treaty of Plant Genetic Resources for Food and Agriculture. CropLife International supports regulation that provides consistent rules enabling access to genetic resources for research and development.

# PROMOTING RESPONSIBLE USE OF CROP PROTECTION AND PLANT BIOTECHNOLOGY

una voz

一个声音 ÉÉN STEM

## West Africa Training in Responsible Use

**CropLife International and the global network are committed to promoting the responsible use of crop protection products.**

Since 2005 the plant science industry has trained over two million farmers worldwide in responsible use of its products. One leading training program is in West Africa where CropLife Africa Middle East has partnered with World Cocoa Foundation to train cocoa farmers to become Spray Service Providers (SSPs) – these are professionals who are able to help the wider farming community by identifying pests, providing advice on their management and, when needed, properly applying crop protection products on cocoa farms.

*The plant science industry has trained over two million farmers worldwide in responsible use of its products.*

---

So far 50,000 cocoa farmers have benefited from the training program. In 2014 CropLife International developed a microsite with resources on the project, including an award-winning short film and infographics on responsible use of crop protection products among cocoa farmers. One goal of the microsite is to encourage similar partnerships and stewardship programs in other areas of the world.

## Reaping Global Benefits from Container Management

**The plant science industry is taking the lead to ensure the development, use and appropriate disposal of crop protection containers to protect both farmer health and the environment.**

There are currently 40 established container management programs operating worldwide, often run in partnership between industry and government. In 2014 CropLife International and the European Crop Protection Association (ECPA) shared best practices at a global summit and committed to promoting the expansion of container management programs to new regions and countries. The ultimate aim is to recover 100 percent of crop protection containers worldwide for recycling and safe disposal.

## Guarding Against Insect Resistance

**Nearly all methods of pest control have limited life spans because pests adapt or evolve resistance, which can reduce the long-term utility of control methods.**

Insect and herbicide resistance management are challenges that all farmers must face, and biotech crops do bring some unique considerations which must be considered by technology providers and farmers. The plant science industry is committed to tackling resistance of insects to its products so that farmers have effective tools to maintain a healthy crop, and in 2014 CropLife International updated the industry's Insect Resistance Management (IRM) principles for plant biotech to help growers, agriculture value chain members, and regulators better understand pest resistance and how to develop, implement, and review proper resistance management.

## Collaborating with Excellence Through Stewardship

**CropLife International took a leading role in the industry-coordinated stewardship program Excellence Through Stewardship (ETS) which promotes the universal adoption and auditing of stewardship programs and quality management systems for the full life-cycle of biotechnology-derived plant products.**

In 2014 CropLife International drew on expertise from the Biotech Team of the Insect Resistance Action Committee (IRAC) to help write The Guide for Resistance Management for Biotechnology-Derived Plant Products. The guide is an educational tool to assist users in developing and implementing their own specific process for resistance management of plant biotechnology products throughout the product life cycle from research and discovery through to commercialization and post-market activity.

PROMOTING THE  
CONTRIBUTION  
OF PLANT SCIENCE  
TO SUSTAINABLE  
AGRICULTURE

ОДИН ГОЛОС  
UNA VOZ  
SAUT  
UNE SEULE VOIX  
— ↑ —

## Raising CropLife International's Global Profile

**The World Food Prize annually brings together some of the leading thinkers, policy makers and organizations on food security, and CropLife International was proud to play a prominent role at the 2014 event.**

CropLife International joined with the International Food Policy Research Institute (IFPRI) to co-host an official side event, Drought and Disease Tolerance for Food Security, featuring a panel of farmers facing pressure from climate change, and it organized a private reception with Truth About Trade and Technology (TATT) to bring together over 120 industry stakeholders to recognize the role of plant science innovation in supporting farmers worldwide.

CropLife International also hosted 26 international journalists on a media tour that included a trip to a plant science research facility, farm visits and interviews with industry experts.

### 2014 SOCIAL MEDIA GROWTH



#### TWITTER

- 50% increase in followers and engagements



#### FACEBOOK

- 20% increase in followers

4 Million impressions for #HelpingFarmersGrow social media campaign

A strong presence at the World Food Prize, and interaction with some of the industry's most prominent journalists, has further established CropLife International's reputation as an experienced and valuable voice in the debate to feed a growing population sustainably.

## Food Security in a World of Natural Resource Scarcity

**In February 2014 the International Food Policy Research Institute (IFPRI) launched a seminal report, "Food Security in a World of Natural Resource Scarcity."**

It detailed the impact agricultural technologies and practices could have on global crop yields and food security under likely climate change scenarios.

*Without agricultural technology, farmers will not have the tools to feed a growing population sustainably.*

The study, which was supported by CropLife International, the U.S. State Department and the CGIAR Research Program on Policies, Institutions, and Markets, found that farmers will need to integrate multiple technologies including plant biotech traits and crop protection products, into their cropping systems in order to produce the largest yields at the lowest prices to consumers. CropLife International was able to draw on its global network of coalitions to ensure the message reached policy makers around the world.

The report received wide global coverage with more than one million media impressions.

It has been presented to high-profile inter-governmental organizations and government agencies, including USAID, the UK Department for Environment Food and Rural Affairs (DEFRA), the Organization for Economic Co-operation and Development (OECD) and the UN Food and Agriculture Organization (FAO). The message was clear: without agricultural technology farmers will not have the tools to feed a growing population sustainably.

## Sharing the Plant Science Story

**How do we meet our world's need for calories? What is so important about soil? How do we help farmers deal with climate change?**

These are some of the topics that CropLife International has covered in its monthly newsletter Plant Science Post in 2014. The newsletter underwent a redesign in 2014 to take a more creative and visual approach to share information about the impact and benefits of plant science products, be more shareable on social media platforms, and to give the global CropLife network a positive resource to circulate with other stakeholders to position the industry as a leading voice on plant science.

Subscribe online at the CropLife International website to receive fascinating plant science facts and figures every month.

**CROPLIFE INTERNATIONAL AISBL**

Avenue Louise 326 box 35  
1050 Brussels, Belgium  
Tel +32 2 542 04 10  
Fax +32 2 542 04 19  
Croplife@croplife.org  
croplife.org

Published 2015. Printed on 100% recycled paper.

