



Turning shared purpose into action



ANNUAL REPORT 2025
IN BRIEF



Welcome

2025 was a year of turning shared purpose into action. Across our global network, members worked together to align approaches, strengthen capabilities and move sustainable agriculture further into implementation.

This report reflects the value of collaboration in helping the agri-food sector navigate complexity, reduce fragmentation and build more resilient, regenerative and commercially viable production systems for the future.

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Leadership



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2025 reviews

PRESIDENT'S REVIEW

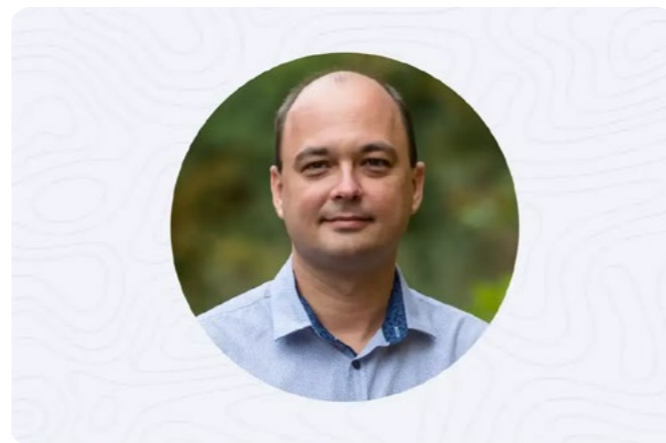
Robert M. Erhard

It is a privilege to present the SAI Platform Annual Report 2025 and to reflect on the continued evolution of sustainable agriculture, and the role our sector plays in shaping it.

Across the agri-food system, one principle is increasingly clear: sustainability earns its place by strengthening business resilience, not by standing apart from it.

Long-term progress depends on delivering environmental, social and economic outcomes together, through solutions that support efficient operations, responsible resource use and robust business models, while continuing to meet regulatory and societal expectations.

This requires holding purpose and pragmatism closely together.



At farm level, this shift is well underway. The focus is moving towards resilience, long-term viability and continuous improvement. In an environment shaped by market volatility, geopolitical uncertainty and evolving trade dynamics, regenerative agriculture and circular approaches offer practical pathways to strengthen both farm performance and supply chain stability. Being fit for the future is no longer defined by a fixed notion of “world-class” performance, but by the ability to adapt and improve over time.



Sustainable agriculture will scale only where it delivers clear value at farm and business level, this is now the defining test for our collective progress.

Supporting the transition at farm level

At the same time, expectations on farmers continue to grow. Supporting this transition requires solutions grounded in reality, combining science, economics and on-farm experience. A stepwise approach remains essential, recognising the diversity of farming systems and enabling meaningful progress at pace and scale.

A critical enabler is a stronger focus on credible farm and project-level business cases. Demonstrating measurable impact across productivity, resilience and natural resources is essential to inform decision-making and build confidence in scalability. Companies play a key role in working alongside farmers to develop and share such impact cases that are replicable, relevant and grounded in real production systems.

Progress increasingly depends on robust digital farm ecosystems. Data, digital tools and feedback loops are becoming fundamental to support farmer decision-making and continuous improvement.

As artificial intelligence becomes more embedded in agriculture, access to high-quality farm-level data will be decisive. It is credible electronic measurement, reporting and verification that underpin the integrity of reporting from farm level through to business transactions and regulated disclosures.

Across the sector, fragmentation is no longer viable. Multiple frameworks and inconsistent approaches create inefficiencies and limit progress. Alignment, harmonisation and collaboration are therefore not merely aspirations, but necessities to improve efficiency, manage risk and enable scalable solutions.

SAI Platform's role

Sustainable agriculture will scale only where it delivers clear value at farm and business level, this is now the defining test for our collective progress. It is here that SAI Platform continues to play a critical role. For more than two decades, it has helped align the agri-food industry around shared principles and practices.

Today, its frameworks, including the Farm Sustainability Assessment, the European Roundtable for Beef Sustainability, the Sustainable Dairy Partnership and the Regenerating Together Programme, are increasingly embedded in day-to-day operations, supporting more consistent approaches across supply chains.

The Regenerating Together Programme represents an important step forward. It marks a significant shift from concept to implementation, providing a structured pathway to operationalise regenerative agriculture across commodities and geographies. Its strength lies in connecting scientific insight, business realities and farmer needs into an approach that can be applied in practice and scaled over time.

Looking ahead

At the heart of this progress is the collective effort of SAI Platform's members. The strength of the organisation lies in its member-driven governance and active working groups, supported by a capable Secretariat translating shared ambition into practical tools and measurable outcomes. The value created is directly linked to the level of engagement, collaboration and commitment across its membership.

After several years of involvement in SAI Platform's governance, I remain encouraged by the progress achieved and the continued willingness of members to align, learn and act together. As this marks my final contribution as President, I would like to thank all members, the Executive Committee and the Secretariat for their trust, collaboration and commitment.

Looking ahead, the direction is clear. The next phase will be defined by our ability to deliver consistent, credible results at scale: by strengthening alignment, building robust business cases and continuing to invest in practical, scalable solutions. I am confident that SAI Platform will continue to play a leading role in turning shared ambition into meaningful action.

DIRECTOR GENERAL'S REVIEW

Dionys Forster

The strength of SAI Platform has always come from the willingness of our members to work together. However, geopolitical uncertainty, economic pressure and increasing supply chain complexity are testing the shared ambitions that have guided our industry's progress.

In times like these, the question is whether we retreat into silos and focus only on immediate pressures or stay the course and continue the work needed to truly strengthen sustainable sourcing and production for the long term.

Yet this is precisely when alignment matters most. The challenges facing agriculture, from climate resilience and nature protection to farmer livelihoods, responsible sourcing and credible reporting are too interconnected for any one company to solve alone. Working separately increases duplication, cost and fragmentation. Working together allows us to align effort, share knowledge and co-develop solutions.

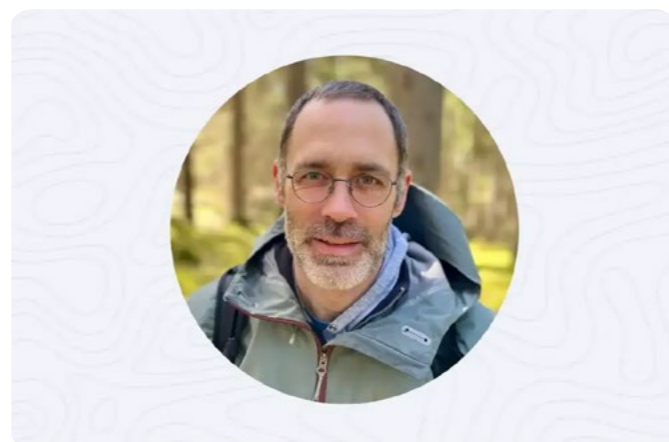
From ambition to implementation

In 2025, SAI Platform focused on the practical conditions required for change: helping members align around shared frameworks, build confidence in measurement, reduce duplication, learn from one another and move from ambition into implementation. This also means keeping sustainability grounded in business reality and farmer experience, so that solutions are credible and workable across diverse production systems. This year, that shared purpose became visible through action across our working groups, industry solutions, projects and member engagement.

Collaborative action across value chains

Through our Collaborative Action work, members addressed common challenges across beef, crops and dairy value chains.

The Crops Working Group advanced discussions on regenerative agriculture, emissions reduction, MRV



Our role is to bring the industry together, create the conditions for alignment and support members in turning shared purpose into action.

and farmer transition pathways, while the Argentina Peanut Project moved from planning into field-level implementation across 10,000 hectares.

By combining incentives, local engagement and robust measurement, the project is generating insight into how regenerative agriculture can scale across crop systems.

In beef, the European Roundtable for Beef Sustainability (ERBS) strengthened its role as a bridge between science and practice. Members engaged with agroecology, biodiversity, GHG emissions and regulatory readiness, supported by expert input and on farm learning. The launch of the ERBS Nature Toolbox marked an important step in helping members measure, monitor and improve performance across biodiversity, soil health and carbon.

In dairy, the Dairy Working Group advanced alignment in sustainability reporting through the Sustainable Dairy Partnership (SDP), while supporting collaborative work on carbon accounting methodologies, regenerative agriculture and the SDP LATAM Brazil pilot. These efforts reflect the value of collaboration in reducing duplication and improving efficiency across global dairy supply chains.

Our Climate and Special Projects work further connected activity across commodities. From

greenhouse gas tool assessments in beef and crops to the Crops Carbon Toolbox, Dairy Mass Balance, and Chain of Custody guidance, members worked together to build knowledge, test approaches, and create resources for more informed decision-making.

Industry solutions

Our Industry Solutions continued to evolve to meet changing member needs.

The Farm Sustainability Assessment (FSA) supported responsible sourcing across 46 countries and 181 crops, while advancing work on a Due Diligence Add-on and enhanced assurance through ASI and the Verification Integrity Programme.

The ERBS launched 12 new 2030 targets, creating a clearer structure across activity, pathway and outcome-based measures.

The Sustainable Dairy Partnership launched SDP 2.0, improving usability, guidance and reporting consistency across global dairy supply chains.

Regenerating Together

A major milestone was the continued development and piloting of the Regenerating Together Programme. With 31 pilot cases across 15 commodities and 21 countries, the RTP moved into widescale testing, showing how a

structured, outcome-based approach to regenerative agriculture can be applied across geographies and production systems.

The India smallholder potato initiative, supported by The Rockefeller Foundation and implemented with McCain Foods and PepsiCo, provided a flagship example of field-level implementation, combining agronomic validation with farmer-centred socio-economic indicators.

Member engagement

Member engagement remained central to our progress in 2025. Our Annual Event in Paris brought farmers, industry, policymakers, finance leaders, researchers and partners together to explore how regenerative and climate-smart agriculture is moving from ambition to implementation. Across webinars, working group meetings, field visits and peer learning opportunities, members shared knowledge, strengthened capabilities and aligned around common solutions.

The value of SAI Platform lies in our collective effort. Our role is to bring the industry together, create the conditions for alignment and support members in turning shared purpose into action. Looking ahead, the opportunity is clear: to build on this momentum, deepen collaboration and continue developing the tools, partnerships and pathways needed to support more resilient and sustainable food systems.



Our 2030 strategy

In 2025, we began implementing SAI Platform's 2030 Strategy, marking an important year of transition for the organisation.


Structured around three pillars, the strategy is designed to better align our work with members' needs and strengthen the way we deliver value across the agri-food sector.

Supported by transversal functions including Communications, Finance, HR and Operations, this structure enables teams and members to work more effectively across priorities, programmes and solutions.


Delivering this strategy depends on the people behind it. Across the Secretariat, teams work together to support members, coordinate communities, develop industry solutions, strengthen operations and communicate our collective progress. Their expertise, collaboration and commitment help turn strategy into action and ensure SAI Platform continues to deliver value for its members and the wider sector.

Organisational structure


Three strategic pillars that build upon one another to accelerate the harmonisation and adoption of industry processes, solutions, and regenerative practices.



GATEWAY TO EXPERTISE
We engage, educate and enable members throughout their sustainability journey...



COLLABORATIVE ACTION
To drive collaborative action and provide actionable insights...



INDUSTRY SOLUTIONS
That allow us to create industry standards and solutions.

Our membership



+13
new members in 2025

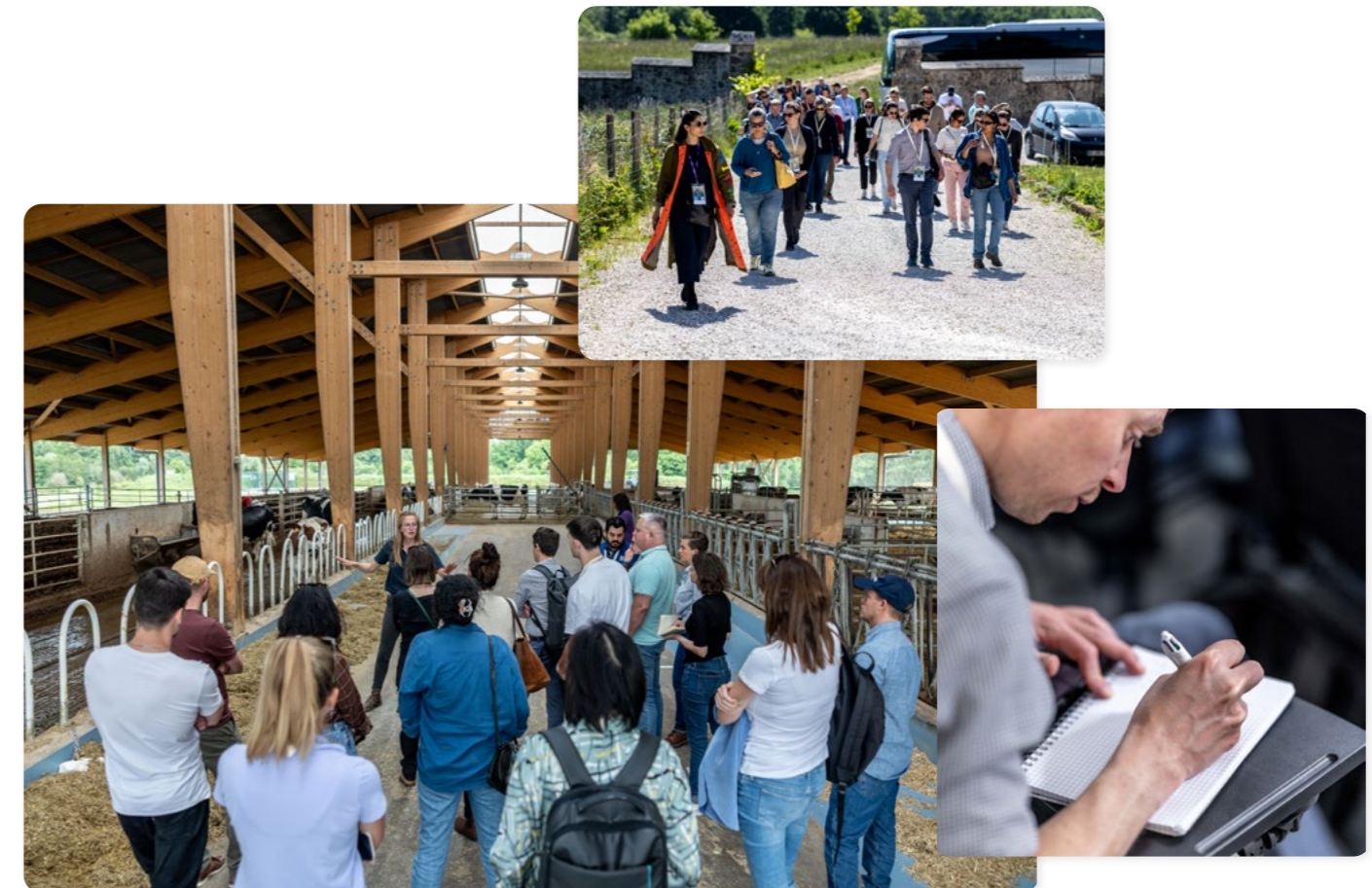


54%
of those are
members of SBTi



20%
of those have
a Net Zero target

SEE [SAIPLATFORM.ORG](https://www.saiplatform.org) FOR OUR FULL LIST OF MEMBERS





Insights and impact



IN THIS SECTION:

- **EVENTS AND WEBINARS**
- **OUR IMPACT**
- **PARTNERSHIPS**

SAI Platform membership is built on the premise that shared challenges are best addressed through collaboration, alignment and collective action.

By bringing together diverse expertise across the agri-food sector, members gain access to practical tools, industry insights, strategic partnerships and peer learning that support more consistent, credible and scalable sustainability approaches. Together, this growing global community is helping drive measurable progress across food and beverage supply chains.

Events and webinars

In 2024, we strengthened connections, dialogue, and industry alignment, ensuring members are supported with the tools, insights, and partnerships needed to navigate the evolving sustainability landscape.

Whether through in-person gatherings, online knowledge-sharing, or cross-sector collaborations, our members are at the forefront of driving change across supply chains, from farm to table.



ANNUAL EVENT 2025

Scaling Regenerative and Climate-Smart Agriculture

SAI Platform’s Annual Event 2025 brought together members and partners in Paris, France, to explore how regenerative and climate-smart agriculture is moving from ambition to implementation across global food and beverage supply chains.

Held from 19th to 22nd May, the event combined field visits, expert-led discussions, collaborative workshops and peer-to-peer exchange across crops, dairy and beef systems.

Members explored how resilience across supply chains begins on farm, with discussions focused on farmer viability, climate resilience, regenerative agriculture, measurement and verification, and transition pathways for scaling sustainable agriculture in practice.

#SAIPlatform2025 reinforced the importance of bringing farmers, industry, policymakers, finance leaders, researchers and partners together to align around shared approaches and turn sustainability ambition into coordinated action across the agri-food sector.



WEBINAR SERIES

How shared learning expands industry capacity

Scaling resilient and regenerative food systems depends on continuous learning and knowledge exchange.

Our webinar series brings together industry, research, policy and technical expertise, helping members navigate evolving sustainability challenges and accelerate informed action across global supply chains.

8 PART SERIES

Regen reflections

In partnership with Cool Farm, this webinar series explored regenerative agriculture through the lens of MRV, soil health, GHG emissions and farmer resilience, helping members better understand how meaningful measurement and farmer-centred approaches can support scalable and lasting transition.

8 PART SERIES

EUDR solutions forum

Hosted by the ERBS in partnership with Efeca, this webinar series supported members to navigate evolving EU sustainability regulations, providing practical guidance and updates on EUDR, CSRD and CSDDD requirements, implementation challenges and supply chain due diligence expectations.

Our impact

Our strength lies in our diverse global membership and our ability to bring together the food and beverage industry around shared sustainability challenges and solutions.

Across crops, dairy and beef systems, members collaborate through working groups, industry solutions and collective initiatives that support responsible sourcing and production, while building resilient supply chains.



Our members are working together on



Beef

20 members



Crops

133 members



Dairy

56 members

...across four industry solutions



20

ERBS member organisations



121

FSA member organisations



31

RTP pilot member organisations

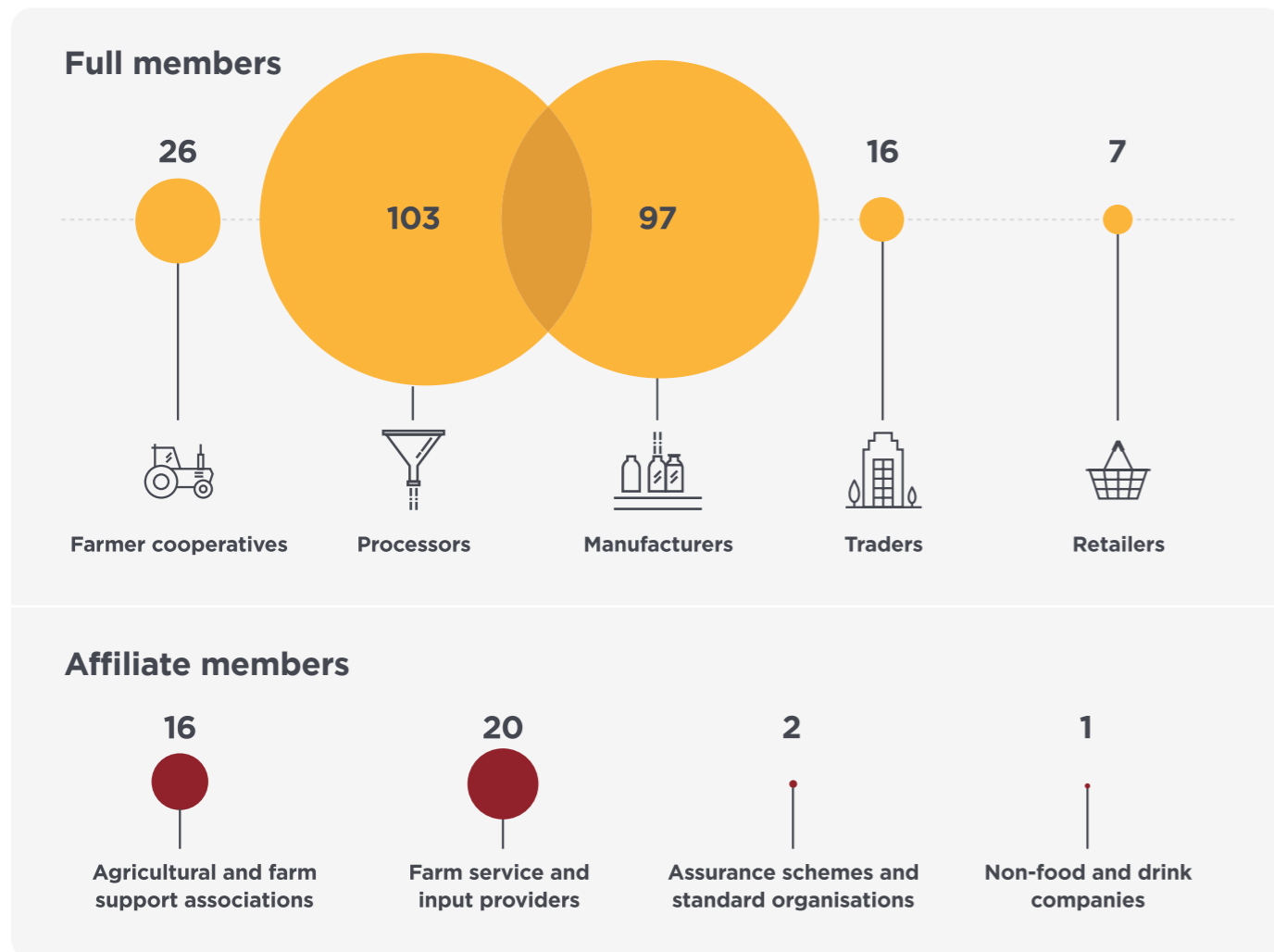


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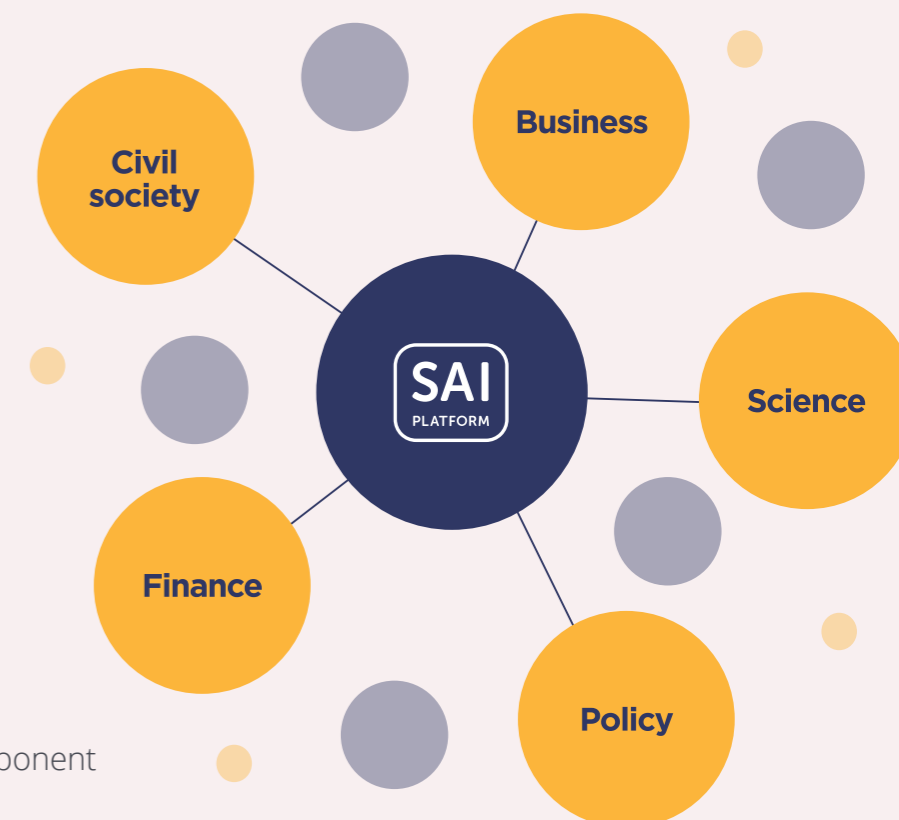
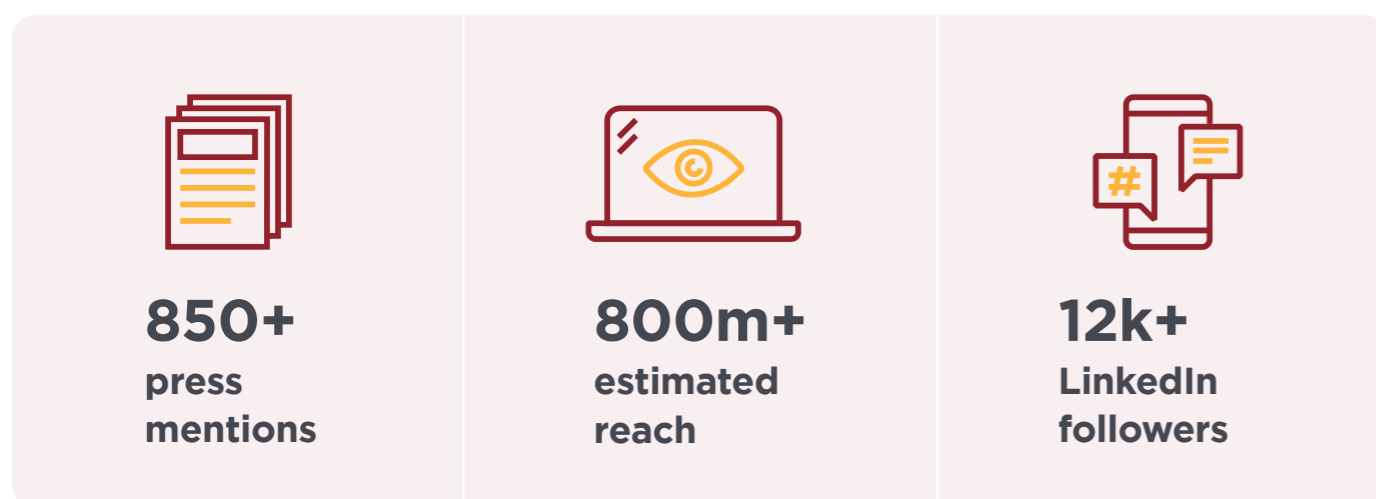
SDP member organisations



Our members are engaged across the value chain



Our brand reach



Partnerships

Partnerships are an essential component of scaling.

SAI Platform works with an ecosystem of organisations, connecting member-led action with specialist knowledge in implementation, measurement and systems change, and helping turn shared ambition into approaches that can be tested, adapted and scaled.

Around SAI Platform is a wider ecosystem of organisations that bring expertise, influence and implementation capacity across business, science, policy, finance and civil society.

Our partners

SAI Platform partnered with multiple organisations over 2025 working in aligned areas across the globe, collaborating and sharing knowledge to minimise duplication of effort.

- Animal Health Europe
- Cool Farm Alliance
- Dairy Sustainability Framework
- ECAF – European Conservation Agriculture Federation
- GLOBALG.A.P.
- ITC – International Trade Center
- Polskie Zrzeszenie Producentów Bydła Mięsnego
- WBCSD – World Business Council for Sustainable Development / One Planet Business for Biodiversity (OP2B)
- The Rockefeller Foundation
- International Potato Center (CIP)
- 60 Decibels
- iPuma
- ReGrow
- GapGreen
- Soil Capital

SEE SAIPLATFORM.ORG FOR MORE INFO ON OUR PARTNERS

Partner highlights



Cool Farm Alliance

Together with Cool Farm Alliance, we continue the Regen Reflections webinar series, supporting members with shared learning on MRV, soil health, GHG emissions and farmer-centred approaches to regenerative agriculture.



ECAAF

During the 2025 Annual Event, we signed a Memorandum of Understanding with ECAAF, strengthening collaboration on conservation agriculture and supporting greater alignment around resilient and regenerative farming systems.



EIT Food

Through our partnership with EIT Food, we are advancing innovation, capability building, and scalable solutions for regenerative agriculture, including collaboration on the MRV Solution Challenge to connect industry needs with emerging MRV approaches.



WBCSD and OP2B

Through our strategic partnership with WBCSD/OP2B, we are helping advance alignment across the agri-food sector, connecting industry action with wider efforts to harmonise frameworks, outcomes and approaches for sustainable and regenerative agriculture.



The Rockefeller Foundation

With support from The Rockefeller Foundation, we are bringing the Regenerating Together framework into field implementation. Together with member companies and partners we are developing and testing scalable approaches to ensure regenerative agriculture supports farmer livelihoods.

60__decibels

60 Decibels

As part of project in India with smallholder farmers, we are working with 60 Decibels to develop and validate socio-economic indicators that help better understand farmer adoption, livelihoods and resilience in the transition to regenerative agriculture.





Collaborative action



IN THIS SECTION:

- WORKING GROUPS
- PROJECTS
- REGIONAL INITIATIVES

Working groups

BEEF

Building bridges between science and practical application to drive sustainable beef value chains



In 2025, the European Roundtable for Beef Sustainability (ERBS) strengthened its role as a bridge between science and industry, advancing practical approaches to agroecology, biodiversity and climate resilience across European beef systems.

Through external expertise and knowledge exchange, the ERBS supported members in deepening their scientific understanding and translating it into practical application across beef value chains, helping to close the gap between research and on-farm implementation.

The group's activities increasingly focused on translating knowledge into practical application, enabling members to apply shared insights across their operations and supply chains.

With strong foundations now in place, the ERBS will continue to build on this approach by further integrating scientific expertise, improving alignment across the sector, and supporting the transition to more consistent, outcome-based sustainability practices.

12
webinars on EUDR readiness, GHG emissions and biodiversity

26
members

From knowledge to practical implementation

Through shared tools, expert insights and collaborative platforms, members are better equipped to implement more consistent and credible sustainability practices across their operations. These include:

- Navigating increasing regulatory complexity**
- Understanding and applying biodiversity and climate metrics**
- Aligning approaches to measurement and reporting**
- Translating sustainability commitments into farm-level action**

ERBS Nature Toolbox

As part of our ambition to scale the implementation of the Regenerating Together framework, a significant step forward for the beef community was the ERBS Nature Toolbox.

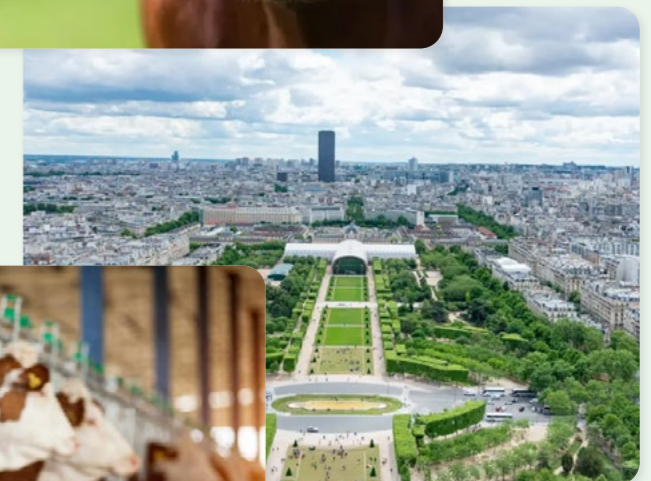
As expectations around nature, biodiversity and carbon continue to increase, the need for consistent and credible measurement is becoming a critical challenge for the sector.

The Toolbox responds by providing a practical and structured approach for members to measure, monitor and improve performance across biodiversity, soil health and carbon.

Designed to support different levels of maturity, it enables members to build capability over time while maintaining consistency in how performance is assessed, helping reduce fragmentation and strengthen readiness for regulatory and market expectations.

Key moments from 2025

- Annual meeting in Paris, France**
- EUDR and regulatory readiness webinar series**
- Biodiversity knowledge exchange webinar**



CROPS

Advancing regenerative agriculture across global crop systems



In 2025, the Crops Working Group focused on a central challenge: how to significantly reduce agricultural emissions while building greater climate resilience into crop production.

This challenge is bringing regenerative agriculture to the forefront, not only for its potential to reduce emissions and improve soil and ecosystem health, but for its ability to scale across diverse farming systems.

At the same time, the focus is shifting from ambition to implementation, recognising that meaningful progress comes through stepwise, measurable improvements that support farmers in transitioning towards more regenerative models.



136 members
8 new members
3 meetings

Equipping members to implement robust sustainability strategies

In 2025, the focus moved further towards translating regenerative agriculture into practice at scale. As expectations increase across both industry and policy, the need for reliable and consistent approaches is becoming more urgent.



Key insights shaping the crops community

- ✓ **Soil health as the foundation**
- ✓ **Shared responsibility across the value chain**
- ✓ **A strengthening business case**

Key moments from 2025

- ✓ **WEBINAR SERIES**
Regen reflections
- ✓ **WEBINAR**
FSA Due Diligence
- ✓ **LONDON MEETING**
Crops Working Group Meeting



DAIRY

Aligning sustainability approaches across the global dairy value chain



In 2025, the Dairy Working Group continued to strengthen its role as a forum for collaboration, bringing together leading businesses to align sustainability approaches and support practical implementation across global dairy supply chains.

As regulatory and market expectations accelerate, the need for consistent, efficient and credible sustainability reporting is becoming a defining challenge for the sector.

In response, the group is working to reduce fragmentation and create more aligned approaches that can be applied across complex global supply chains.

50+ member companies



SUSTAINABLE DAIRY PARTNERSHIP

Driving alignment in sustainability reporting

Advancing alignment across sustainability reporting remains a central priority.

Through the Sustainable Dairy Partnership (SDP), members are working towards a shared approach to exchanging sustainability data. This is helping to reduce duplication and enable more consistent, comparable and credible reporting across the sector.

In 2025, this work reached an important milestone with the launch of SDP Version 2, refining reporting frameworks and strengthening alignment across key sustainability topics. As development continues, the focus is increasingly on usability, adoption and practical integration into member systems.

Alongside reporting alignment, the group is addressing shared sustainability challenges across dairy value chains, supporting members in applying aligned approaches in practice.




Enabling more efficient and credible sustainability practices

Across the sector, members are navigating increasing complexity, from evolving regulations to growing expectations around transparency and performance. The Dairy Working Group is helping to address these challenges through a collaborative approach, equipping members to implement sustainability strategies that are both practical and scalable. In 2025, this work focused on four priorities:

-  **Reducing duplication in sustainability reporting**
-  **Improving consistency and comparability of data**
-  **Aligning on key methodologies and metrics**
-  **Strengthening supply chain engagement on sustainability topics**

Key moment from 2025

-  **Dairy Working Group meeting, Auburn, New York**



Projects

CLIMATE AND SPECIAL PROJECTS

Strengthening a shared climate approach across value chains

In 2025, Climate and Special Projects played a central role in strengthening alignment across Beef, Crops and Dairy Working Groups, bringing greater consistency to how climate challenges are understood, measured and addressed across the agri-food sector.



Progress at a glance

-  **Cross commodity climate initiatives spanning beef, crops and dairy**
-  **Member funded multi stakeholder projects**
-  **Dedicated climate focus groups and research programmes**
-  **Development of climate knowledge and tools for the Gateway to Expertise**

Key developments in 2025

Advancing more consistent approaches to climate measurement

A central focus in 2025 has been improving how greenhouse gas emissions are measured, compared and applied across different systems. Across commodities, members are working to address a shared challenge: the lack of consistency in tools, methodologies and data exchange.

Through targeted research and collaboration, this included the assessment of measurement tools across Beef and Crop communities, comparative analysis of methodologies to support more informed tool selection, and the creation of structured resources to support consistent decision-making.



Building the foundations for scalable MRV systems

In the Crops community, the formalisation of the Crops Climate Core Group marked a significant step towards a more structured approach to Scope 3 emissions measurement. Initial work has focused on analysing existing measurement tools, laying the groundwork for more consistent MRV approaches and supporting the development of the Crops Carbon Toolbox.

This knowledge hub within the SAI Platform Learning Academy brings together guidance for carbon-related decision making, support for carbon project implementation, and resources for collaboration and knowledge sharing.



Driving collaboration across the dairy value chain

In the Dairy community, multi-stakeholder collaboration is advancing practical approaches to emissions accounting and supply chain engagement.

The Dairy Mass Balance Chain of Custody Project brought together industry partners to develop guidance aligned with the Greenhouse Gas Protocol, supporting companies in measuring, transferring and reporting emissions profiles across dairy supply chains.

This work is helping to create a more consistent approach to emissions accounting across the dairy sector, supporting more credible Scope 3 reporting.



Expanding into new regions: SDP LATAM pilot

The SDP LATAM Brazil pilot project explored how existing sustainability approaches can be applied in emerging markets.

Led by a group of SAI Platform members and implemented with Brazilian processors, the project tested the feasibility of the Sustainable Dairy Partnership (SDP) in a new context, identifying key barriers to adoption including the need for more structured relationships between processors and farms, and the importance of tailored onboarding approaches in emerging markets. These insights are informing future iterations of SDP and supporting capacity building efforts in Latin America.



PEANUTS

Regenerative landscapes partnership: Argentina Peanut Project

As the agri-food sector works to scale regenerative agriculture across crop systems, one of the key challenges remains how to translate ambition into approaches that are measurable, economically viable and capable of working under real farming conditions.

The Argentina Peanut Project (2025–2028) responds directly to this challenge by moving from early planning into field level implementation across one of the world’s leading peanut producing regions.

Covering 10,000 hectares across Argentina’s peanut growing regions, the initiative is focused on developing scalable regenerative farming systems, with particular

emphasis on minimum tillage and cover cropping to improve soil health, strengthen resilience and support long term productivity.



Key developments in 2025

-  **Alignment across partners on implementation approaches and methodologies**
-  **Advancement of MRV frameworks and data approaches to support credible Scope 3 reporting**
-  **Engagement with local stakeholders to ensure relevance to regional farming conditions**
-  **Preparation for farmer recruitment and baseline data collection**

POTATOES

Co-creating scalable regenerative agriculture solutions with smallholder farmers in India

In 2025, SAI Platform launched a regenerative agriculture initiative in India, focused on smallholder potato farming systems.

It is supported by The Rockefeller Foundation and implemented with member companies McCain Foods and PepsiCo, as well as the International Potato Center CIP and social impact measurement organisation 60 Decibels.

As the sector moves from defining regenerative agriculture to delivering it at scale, a key challenge remains: how to translate global frameworks into locally relevant, practical solutions that work for farmers and supply chains alike.



Understanding and supporting farmer livelihoods in the transition to regenerative agriculture

Alongside agronomic validation, the initiative is advancing how farmer livelihoods, resilience and economic viability are understood and measured.

In collaboration with 60 Decibels, a socio-economic indicator approach has been developed and piloted to better understand:

- The adoption and long-term success (through continuation) of regenerative practices from a farmer perspective.
- Farmer livelihoods and income stability.
- Resilience to climate and market pressures.

This work seeks to inform how farmer livelihoods in the Regenerating Together framework will be strengthened further.

By aligning agronomic performance with farmer centred measurement, the initiative reinforces a fundamental principle of the Regenerating Together Programme: regenerative agriculture must work for farmers as well as for the environment.



Key features

- ✓ **Focus on smallholder potato farming systems in India**
- ✓ **Field level implementation of SAI Platform's Regenerating Together framework**
- ✓ **Testing regenerative practices under real farm conditions**
- ✓ **Development and piloting of socio-economic indicators tailored to regenerative agriculture**

Regional initiatives

AUSTRALIA

Building collaborative pathways for climate and nature positive agriculture



In 2025, SAI Platform Australia continued to strengthen its role as a collaborative platform to support the transition towards reduced-emissions, regenerative, and nature-positive production.

Through the development of its new 2025-28 Strategy Plan and a number of targeted initiatives, the organisation is helping its growing membership to navigate the increasing operational, financial and environmental pressures shaping agriculture in Australia.



Connecting industry, research and policy



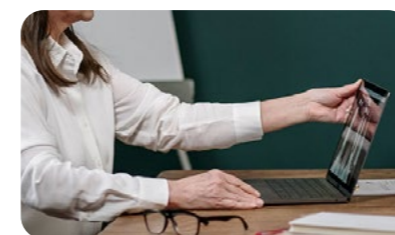
2025 Annual Forum

The 2025 Annual Forum, held in Canberra, brought together 30 members, speakers and government officials to further explore the role of supply sheds across agricultural supply chains. The forum continues to provide an important platform for two way dialogue between industry, policymakers, researchers and other actors across Australia's agriculture and food and fibre sectors.



2025 Field Trip

The 2025 Field Trip to Southern Queensland enabled 15 members and three guests to engage directly with innovative producers across the beef cattle, cotton and horticulture industries, while also exploring the latest sustainability research and technical developments. Discussions throughout the visit focused on practical approaches to achieving emissions reduction, regenerative and nature positive outcomes.



Online meetings

Throughout the year, regular online meetings combined expert guest speakers with member roundtable discussions, helping members navigate emerging sustainability topics including climate scenario analysis and nature related financial disclosures.

SUPPLY SHED PROJECT

Exploring new models for shared sustainability outcomes

A major collaborative initiative in 2025 explored how supply shed models can help accelerate greenhouse gas emissions reductions and broader sustainability outcomes across agriculture.

Through desktop research and stakeholder interviews involving industry, corporates, research bodies, technical providers and government, the project examined how supply shed initiatives are currently being applied, how accounting standards and guidance are evolving to support them, and what new financing and inseting models are emerging.

The work also explored how supply shed approaches can help share investment, scale impact and improve collaboration across supply chains, while supporting

more aligned and efficient sustainability outcomes at landscape level. Insights from the project are now helping inform national thinking around the design and implementation of future supply shed initiatives in Australia.



CHINA

Advancing practical sustainability solutions across China's agricultural systems



With the launch of the 15th Five-Year Plan (2026–2030), China reinforces its commitment to sustainability.

The country's policy direction, anchored in green development, rural revitalisation, and its climate ambitions, is reshaping how agriculture creates value.

Modernisation in China's agricultural sector today is no longer only about productivity, but about producing more with fewer resources, empowering farmers, and strengthening alignment with global markets.

Against this backdrop, SAI Platform has been steadily gaining momentum in China. The Farm Sustainability Assessment tool (FSA) serves as a reference for translating global sustainability principles into day-to-day agricultural practices in China.

1000
FSA verifications issued since 2021

122%
increase in verified farmland from 2024

100,000
hectares of farmland covered



The FSA provides a clear, closed-loop approach – from assessment to improvement – showing us that sustainable agriculture connects environment, people, and profitability.

Shandong Yuxin Bio-tech Co., Ltd.

CASE STUDY

Scaling implementation through local engagement

Supported by BellaTerra Consulting, SAI Platform has continued to strengthen an active community of companies implementing the FSA across China based on local realities and production contexts.

Through training, industry dialogue and direct supplier engagement, the FSA is helping drive more practical and measurable sustainability approaches, from

FSA 3.0

51 new verifications approved in 2025

8 gold

39 silver

4 bronze

tea production in Fujian Province to corn and soy systems in Northeast China.

Together, these efforts are helping accelerate the adoption of more credible, scalable and locally relevant sustainability practices across China's agricultural sector.

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Industry solutions



IN THIS SECTION:

- EUROPEAN ROUNDTABLE ON BEEF SUSTAINABILITY
- FARM SUSTAINABILITY ASSESSMENT
- REGENERATING TOGETHER PROGRAMME
- SUSTAINABLE DAIRY PARTNERSHIP

European Roundtable on Beef Sustainability (ERBS)



In 2025, the European Roundtable for Beef Sustainability (ERBS) took a significant step forward in strengthening how sustainability is defined, measured and delivered across European beef systems.

12
harmonised 2030 targets introduced

6
national multi stakeholder platforms engaged

70%
of European beef production covered



The new 2030 ERBS nature targets mark a pivotal shift for our sector recognising that protecting ecosystems isn't just good stewardship, it's foundational to long term productivity and resilience. By restoring nature, we safeguard the resources our industry depends on and demonstrate leadership in building a more sustainable food system.

Barry Larkham-Jones

CHAIR OF THE TECHNICAL WORKING GROUP, ERBS

From targets to implementation: strengthening a future-ready framework for sustainable beef

As expectations increase for credible, measurable progress, a key challenge for the sector has been moving beyond high-level outcomes towards clearer implementation pathways.

In response, the ERBS evolved its framework into a more structured and actionable system, enabling members to translate ambition into consistent, measurable progress across diverse production systems.

This shift reflects a broader move across the industry: from setting targets to enabling delivery at scale.

Looking ahead

By moving from outcome-only targets to a structured system that connects action, pathways and results, the ERBS is enabling a more practical and measurable approach to sustainability.

This creates a clearer line of sight from farm-level practices to sector-wide impact, supporting credible environmental progress while ensuring that targets remain achievable within real production systems.

With 2030 as a shared milestone, the ERBS now provides a stronger, more consistent framework that supports alignment, implementation and measurable progress across European beef value chains.



Key developments in 2025

- ✓ Building a more structured pathway to 2030
- ✓ From complexity to clarity: supporting implementation at farm level
- ✓ Strengthening alignment across platforms

Farm Sustainability Assessment (FSA)



In 2025, SAI Platform's Farm Sustainability Assessment (FSA) continued to play a central role as a practical and widely adopted framework for assessing sustainability at farm level.



+180k
farmers using FSA globally

181
verified crops

46
countries



As sustainability expectations and regulatory requirements evolve, the FSA must continue to adapt. This year we focused on enhancing the credibility of the system and responding to members' emerging needs, ensuring the FSA remains a robust and trusted framework for sustainable agriculture.

Iver Drabaek
FSA STEERING COMMITTEE CHAIR

A trusted foundation for farm-level sustainability and due diligence

As regulatory expectations around supply chain due diligence evolve, members are under increasing pressure to demonstrate responsible sourcing, manage risk and provide credible evidence of sustainability performance.

In response, SAI Platform is evolving the FSA to better support these needs, ensuring it remains both practical for implementation and robust in its assurance.

A strong and trusted framework

By evolving in line with regulatory expectations and reinforcing the integrity of its verification system, the FSA continues to provide a reliable foundation for sustainable agriculture.

It enables credible and consistent farm-level sustainability assessment, stronger alignment between sourcing practices and due diligence requirements, reduced duplication across sustainability schemes, and greater confidence in reported sustainability performance.

The FSA remains a practical and scalable tool for members navigating an increasingly complex sustainability and regulatory landscape.

Key developments in 2025

- Responding to evolving due diligence requirements
- Enhancing verification and system credibility
- Enabling practical implementation at scale
- Demonstrating impact in practice

Regenerating Together Programme (RTP)



In 2025, the Regenerating Together Programme moved from development into large scale piloting, marking a critical step in turning regenerative agriculture into practical implementation.

136
pilot cases

8
countries

15
commodities



The progress made in 2025 shows that regenerative agriculture can move from ambition to implementation when industry works with a shared framework and a practical pathway for action.

Yves Leclerc
SENIOR DIRECTOR, GLOBAL AGRONOMY & PLANET-FRIENDLY PRACTICES,
MCCAIN FOODS AND RTP STEERCO CHAIR

Operationalising regenerative agriculture through Regenerating Together

As the industry works to operationalise and scale regenerative agriculture, a central challenge remains: how to apply a consistent, outcome-based framework across different commodities, geographies and farming systems.

Regenerating Together responds to this by providing a structured approach that can be adapted, applied and scaled across supply chains

In 2025, the release of beta versions of the programme's core resources, combined with a call to action to members and partners, resulted in 31 pilot cases across 15 commodities in 21 countries.

This represents the first widescale testing of the framework. This helped generate practical insights informing revisions of the framework in preparation for broader adoption by industry and farmers.




An adaptable, scalable framework for regenerative agriculture

The Regenerating Together Programme is establishing a practical pathway for regenerative agriculture to be implemented consistently across the sector.

It enables a shared, outcome-based approach, greater alignment across initiatives and supply chains, practical implementation across diverse farming systems, and a foundation for credible and verifiable claims.



Key developments in 2025

-  Testing regenerative agriculture in practice
-  Learning through collaboration
-  Building the foundation for credible claims



Sustainable Dairy Partnership (SDP)



In 2025, SAI Platform's Sustainable Dairy Partnership (SDP) took a significant step forward in addressing one of the most persistent challenges in the dairy sector: fragmented and duplicative sustainability reporting across global supply chains.



76
active users across the supply chain

35%
global milk supply represented

4
continents

Strengthening sustainability reporting across the dairy sector

As expectations increase transparent and verifiable data, companies are under growing pressure to report consistently while managing multiple buyer requirements, national programmes and internal systems.

The SDP responds to this challenge by providing a single, industry-aligned approach to sustainability reporting, enabling greater consistency, comparability and efficiency across the value chain.

The launch of SDP 2.0 marks a pivotal moment in this evolution, strengthening the system's usability, clarity and credibility, and supporting its role as a practical reporting infrastructure for the dairy sector.

“As a manufacturer of dairy products and ingredients, globally aligned approaches such as the SDP and its streamlined reporting are essential to decision-making, efficiency and sustainability outcomes. This is where SAI Platform enables the sector-wide collaboration necessary to make this possible, and we encourage more of the industry to get involved.”

Darrin Monteiro
CHIEF MEMBER RELATIONS OFFICER
AT CALIFORNIA DAIRIES, INC.

Key developments in 2025

- ✔ Building a more consistent and credible reporting system
- ✔ From complexity to clarity: SDP 2.0
- ✔ Demonstrating implementation in practice



Looking ahead

By providing a single, structured and verified approach to sustainability reporting, the SDP is helping the dairy sector move beyond fragmented systems towards greater alignment and efficiency.

It enables consistent and comparable sustainability data, reduced reporting duplication across value chains, stronger alignment between farm, processor

and buyer levels, and more credible and transparent reporting.

In doing so, the SDP is establishing the foundations for a more coherent and scalable approach to sustainability across global dairy supply chains.

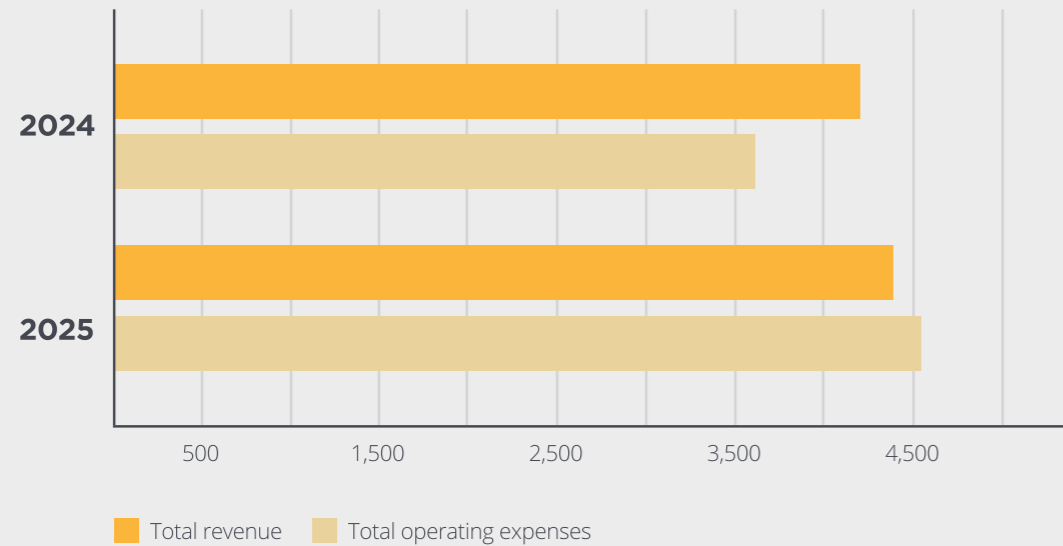




Finance

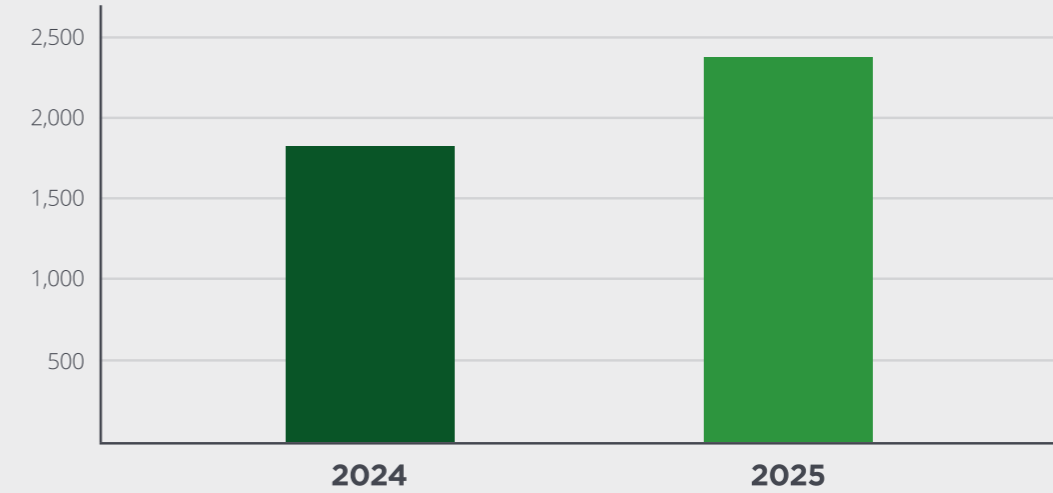


In 2025, we maintained a stable financial position, underpinned by the continued engagement of our member community and prudent financial management. Total operating income reached **€4.37 million**, representing a slight increase compared to 2024.



Revenue vs operating expenses

Year-on-year comparison of revenue vs operating expenses (€'000) – 2024 / 2025.



Total reserve

Year-on-year comparison of total reserve (€'000) – 2024 / 2025.

Membership contributions remained our primary source of revenue, reflecting the ongoing commitment of our members to advancing sustainable agriculture through pre-competitive collaboration.

To deliver our 2025–2030 strategy, we are continuing to diversify funding beyond membership contributions. In 2025, we secured grant funding from The Rockefeller Foundation for the co-creation of scalable regenerative agriculture solutions with smallholder farmers, and from the European Commission via the Swiss State Secretariat for Education, Research and Innovation for the Trails4Soils project.

Total operating expenses increased compared to the previous year, reflecting planned investment in strategy implementation, programme delivery, operational development and organisational capabilities. This resulted in a small operating deficit in 2025, which was more than offset by non-operating income recognised during the year. As a result, we closed the year with a final surplus of €123k.

At year-end, we remained in a solid financial position, with healthy reserves providing a stable foundation for continued industry collaboration, the development of innovative industry solutions and impact across global value chains.

The financial statements for SAI Platform for the year ended 31 December 2025 were audited by Fiduciaire TECAFIN SA, Geneva, Switzerland on April 24th 2026.



**SAI Platform is a global
food and beverage industry
initiative for sustainable
agriculture.**

**We empower our members,
catalyse change and drive
sustainable practices.**

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