



GLOBALG.A.P. & Market Access



Can certification improve access to global markets?





Let's start by looking at grapes...

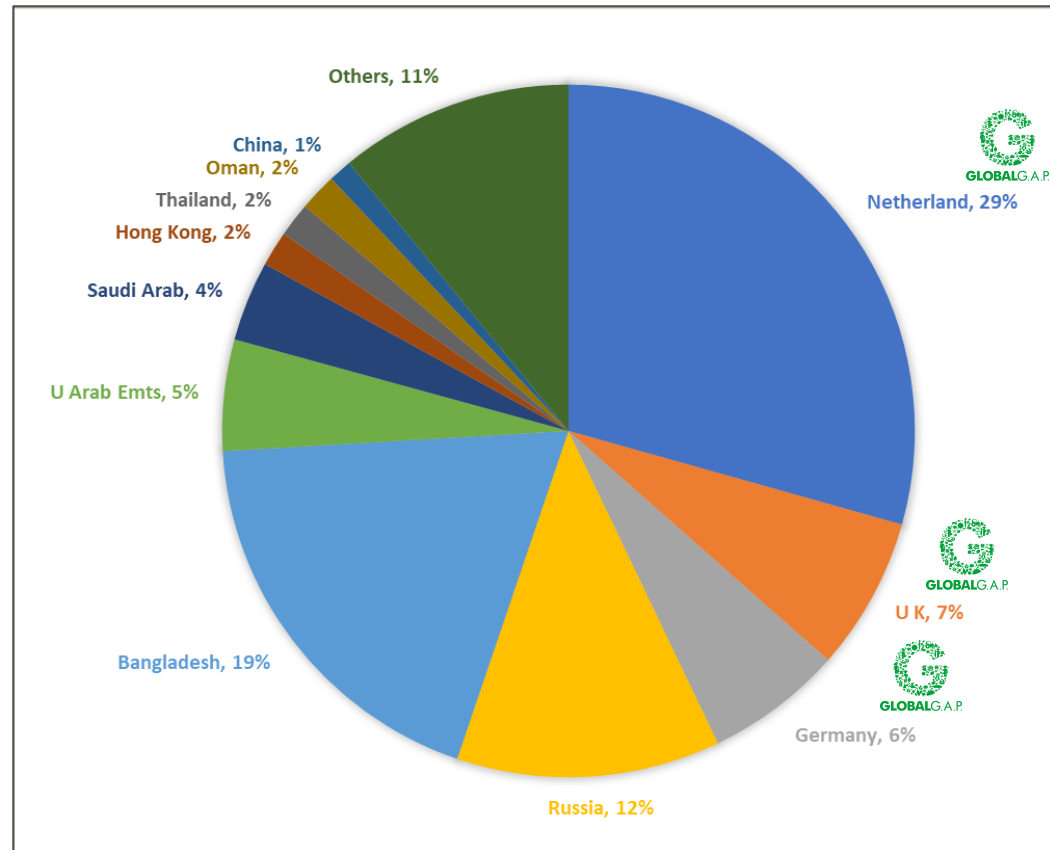


- China (14M tonnes) remains the largest grape consuming country worldwide, accounting for 19% of total consumption.
- Grape consumption in China exceeded the figures recorded by the world's second-largest consumer, the U.S. (6.9M tonnes), twofold.
- China recorded the highest growth rate of the grape market, in terms of the main consuming countries over the last eleven-year period.



The role of certification in export

Case Study Indian Grapes



Three main export markets require GLOBALG.A.P. certification as a “right to supply.”

Can certification improve access to other global markets?

Indian Grape Exports Season 2018-19



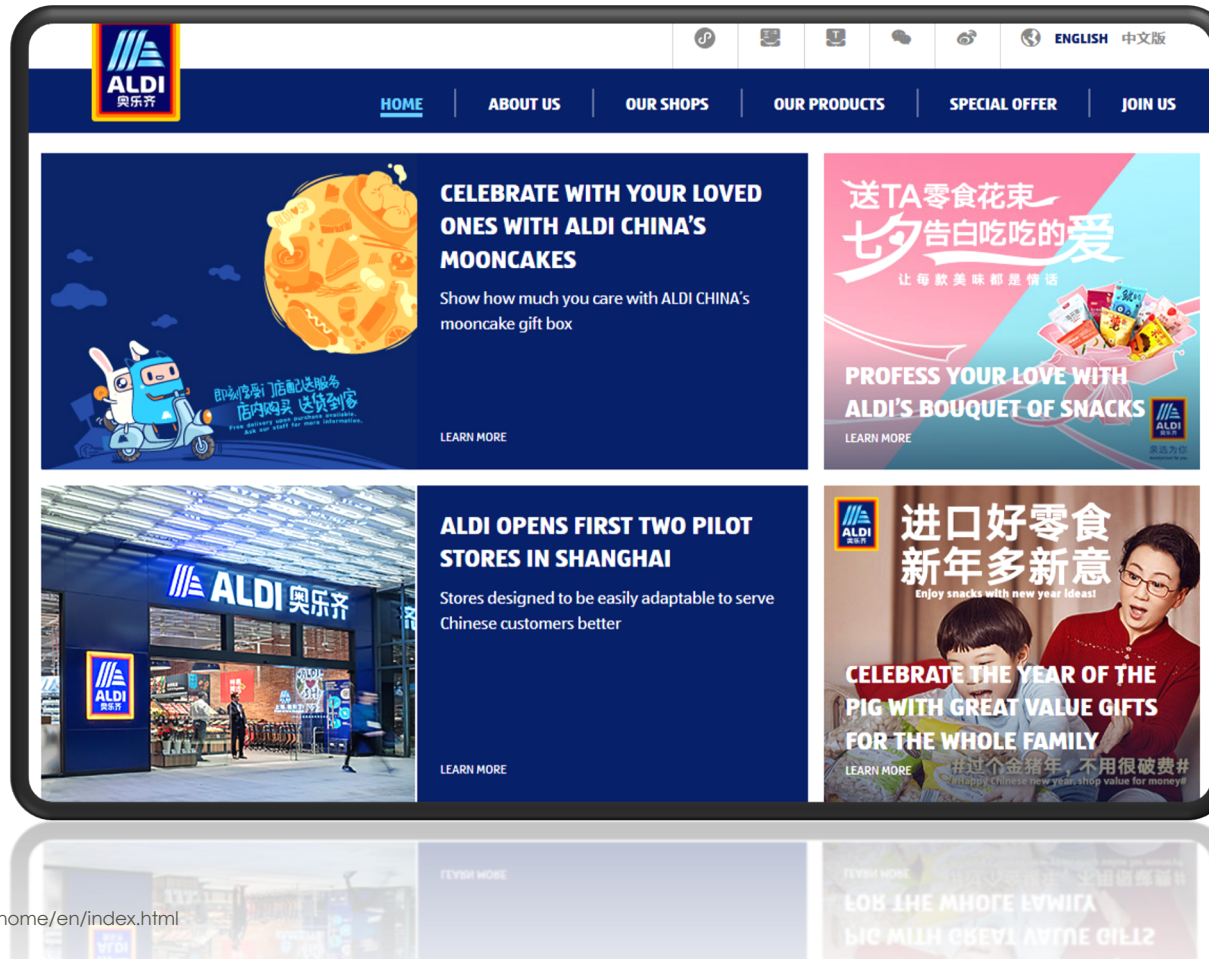
德国打折者进入中国市场



Source: <https://www.aldi.cn/aldi/home/en/index.html>



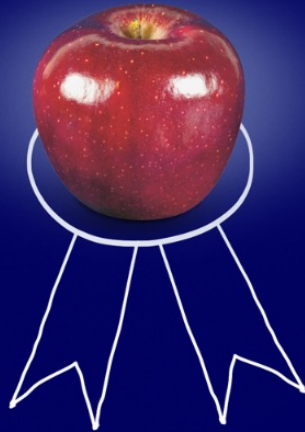
A GERMAN DISCOUNTER ENTERS THE CHINESE MARKET



Source: <https://www.aldi.cn/aldi/home/en/index.html>

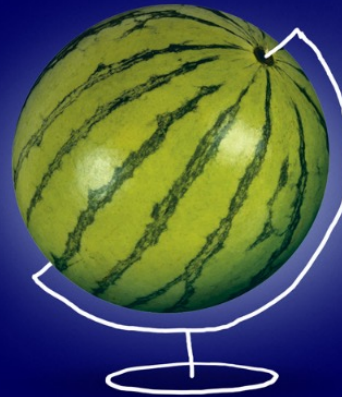


ALDI CHINA commits to food safety, quality and sustainability



We offer our customers quality at the best price and sustainable products.

We assume responsibility throughout the supply chain.



We act responsibly in terms of the environment and work to protect our earth's climate.



Our retail members rely on GLOBALG.A.P. certification



**GLOBALG.A.P.'s new members increasingly come from
outside Europe**



Can GLOBALG.A.P. help Indian producers access markets?

- ✓ European and North American markets will require farm-level food-safety certification;
- ✓ Future access to new export markets will increasingly depend on compliance with similar standards;
- ✓ All markets will place more focus on sustainability in the supply chain;
- ✓ GLOBALG.A.P. offers certification and auditing solutions for food safety, good agricultural practice, traceability and sustainability

So the answer is...

हाँ हम कर सकते हैं!



Source: <https://www.aldi.cn/images/2018aldi/CRPrinciples.pdf>

Let's talk about.....

- What is GLOBALG.A.P.?
- The Integrated Farm Assurance Standard
- **But what is GLOBALG.A.P.?**
The GLOBALG.A.P. System
- GLOBALG.A.P. and Sustainability



We're a global organization with a crucial objective:

safe, sustainable agriculture worldwide.

We set **voluntary** standards for the certification of agricultural products around the globe – and more and more producers, suppliers and buyers are harmonizing their certification standards to match.



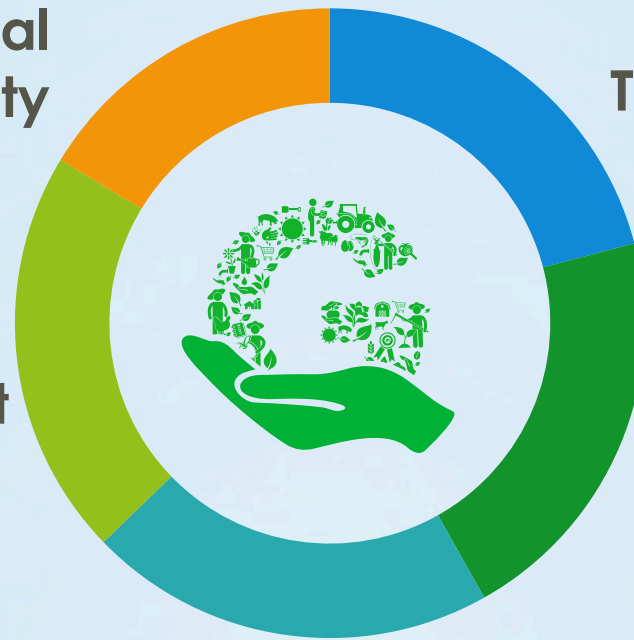
What issues do GOOD AGRICULTURAL PRACTICES cover?

**Workers' Occupational
Health & Safety**

Traceability

Environment

Food Safety



Animal Welfare*

* Only relevant for aquaculture and livestock

OUR STRATEGY



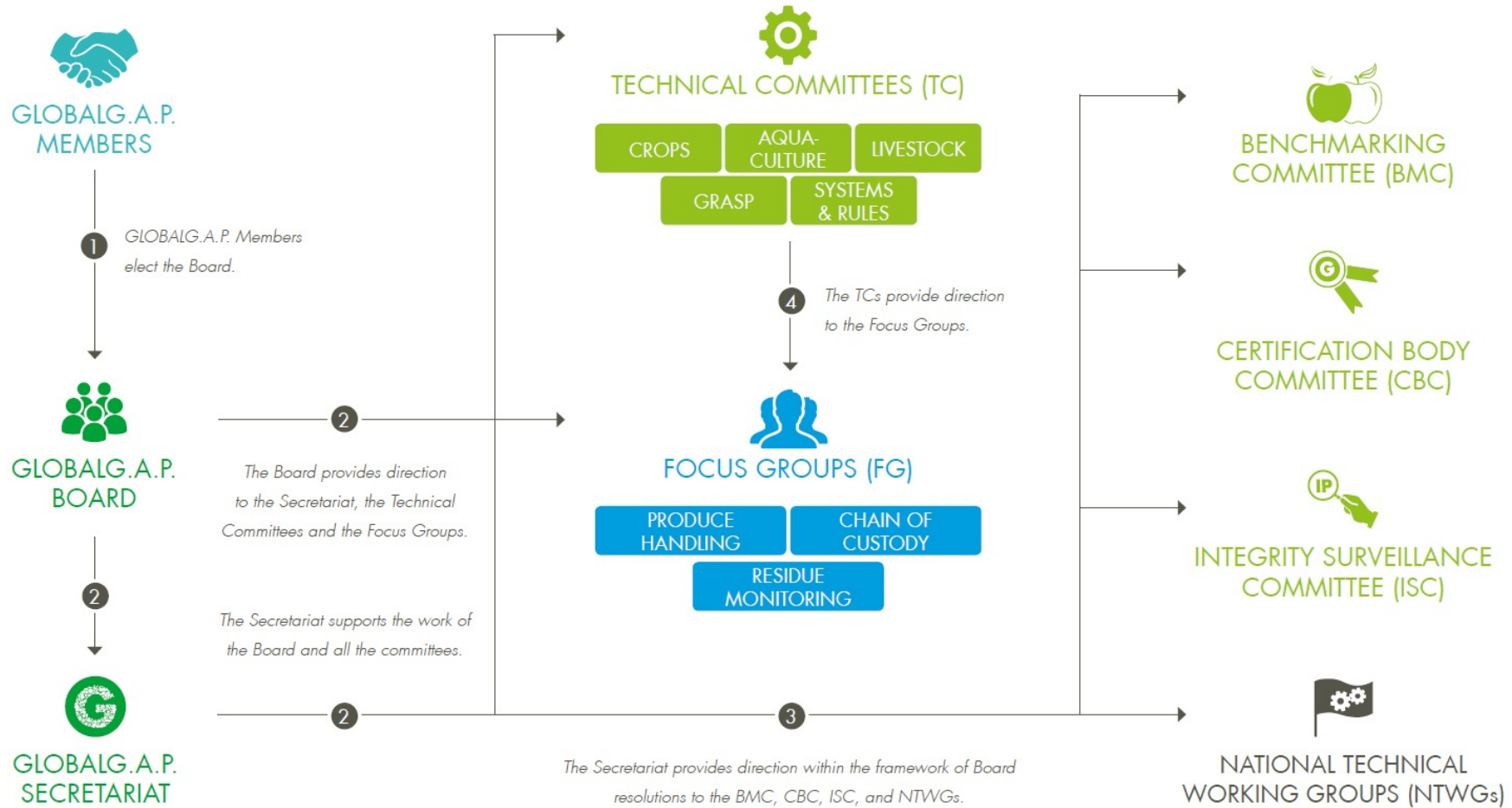


Key facts



GLOBALG.A.P. GOVERNANCE

Member-Driven Decision-Making Structure





GLOBALG.A.P.

The Most Widely Accepted Good Agricultural Practices Certification Worldwide



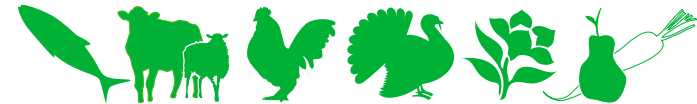
More than **440 voluntary members** form the **GLOBALG.A.P. Community**.



3 main products with **40+ standards** and **programs**.



More than **208,000 producers** under **certification** in over **135 countries**.



More than **600 products** available for certification.



GLOBALG.A.P.

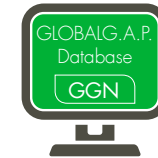
The Most Widely Accepted Good Agricultural Practices Certification Worldwide



GLOBALG.A.P. governed by an **elected Board**.



An extensive **worldwide network** of **consultants** to help producers with their certification process.



A secure **online certification database** to check producers and validate certificates.



More than **2,000 inspectors** and **auditors** working for **160 accredited certification bodies**.



GLOBALG.A.P.

The Most Widely Accepted Good Agricultural Practices Certification Worldwide



More than **1,000 international experts** active in Technical Committees, National Technical Working Groups and Focus Groups.



A harmonization program to **benchmark schemes** and **checklists** around the world.



A pioneering **integrity system** with independent assessments to **monitor** the **performance** of our certification bodies.



Capacity building for thousands of people on **5 continents** and in **10 languages**.



GLOBALG.A.P.

The Most Widely Accepted Good Agricultural Practices Certification Worldwide



An online **consumer portal** for transparent farm verification and information



A **consumer label** for seafood based on the GLOBALG.A.P. Aquaculture Standard






A **consumer label** for plants based on the GLOBALG.A.P. Flowers & Ornamentals Standard



Integrity System: Assessment of CB performance



Region:	Country:	Scope:	Sub-Scope:	Status:
show all	show all	IFA v.5 Crops Base	All	All
Search: <input type="text"/>				Display 25 records
Organisation	Head Quarter	Comments	Status	Performance Rating
4PLUS INGENIEROS Y ARQUITECTOS S.L	Spain		approved	★★★★☆ 4.25
A CERT EUROPEAN ORGANIZATION FOR CERTIFICATION S.A	Greece	 Red Card sanction according to IFA GR v5, Part III, 9.3.4., temporarily suspension due to loss of accreditation.	suspended	★★★☆☆ 2.89
ABCERT AG	Germany		approved	★★★★☆ 3.63
ACERTA Certificacion, S.L.	Spain		approved	★★★★☆ 4.26
Acoura Marine Ltd.	United Kingdom		provisionally approved	★★★★☆ 4.04

Source: https://www.globalgap.org/uk_en/what-we-do/the-gg-system/certification/Approved-CBs/



GLOBALG.A.P. Annual Report



https://www.globalgap.org/.content/.galleries/documents/GLOBALG.A.P._Annual_Report_2018_en.pdf



GLOBALG.A.P.'s family of products



GLOBALG.A.P. Family of Products

GLOBALG.A.P. FAMILY OF PRODUCTS



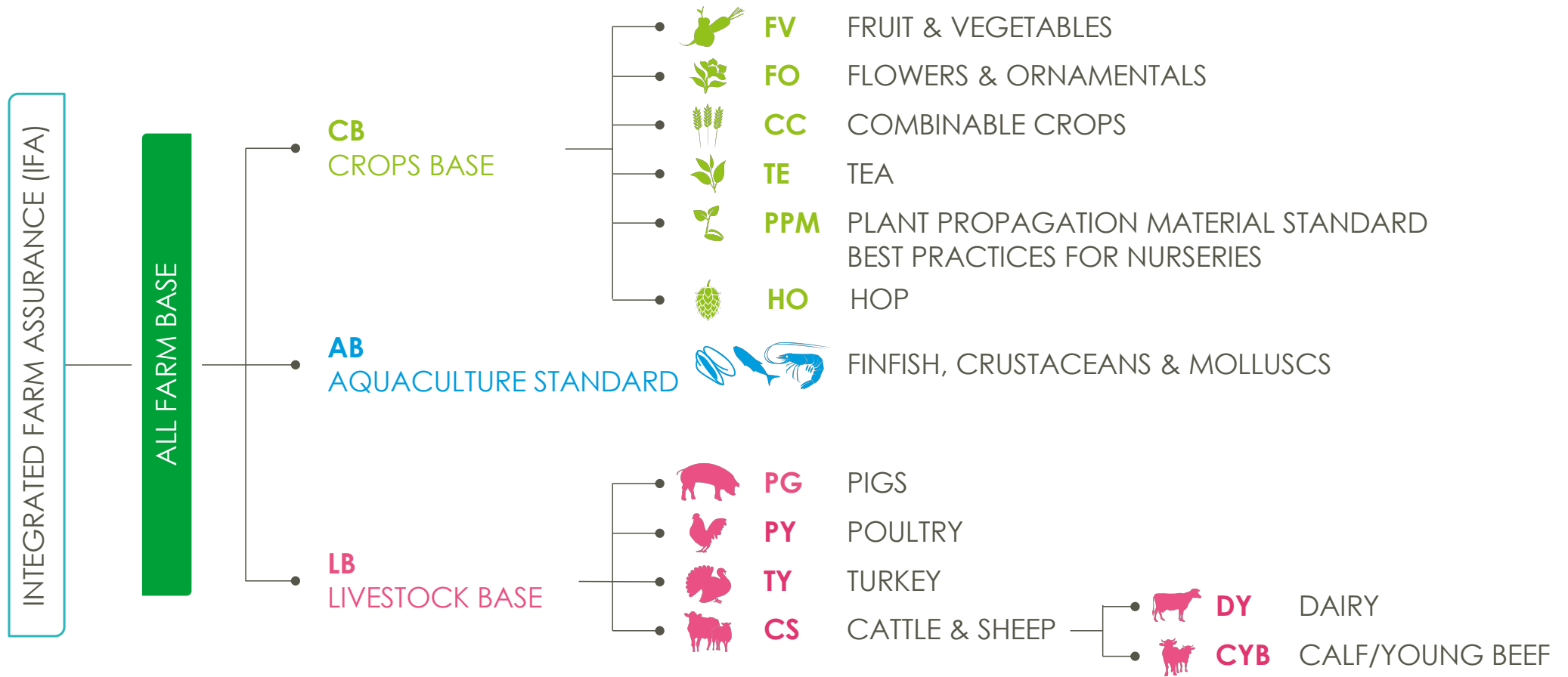
CUSTOMIZED SOLUTIONS

Any Customized Standard, localg.a.p., Add-on, etc.



INTEGRATED FARM ASSURANCE STANDARD (IFA) V5.1

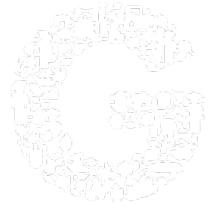
A Modular Approach to G.A.P. Certification





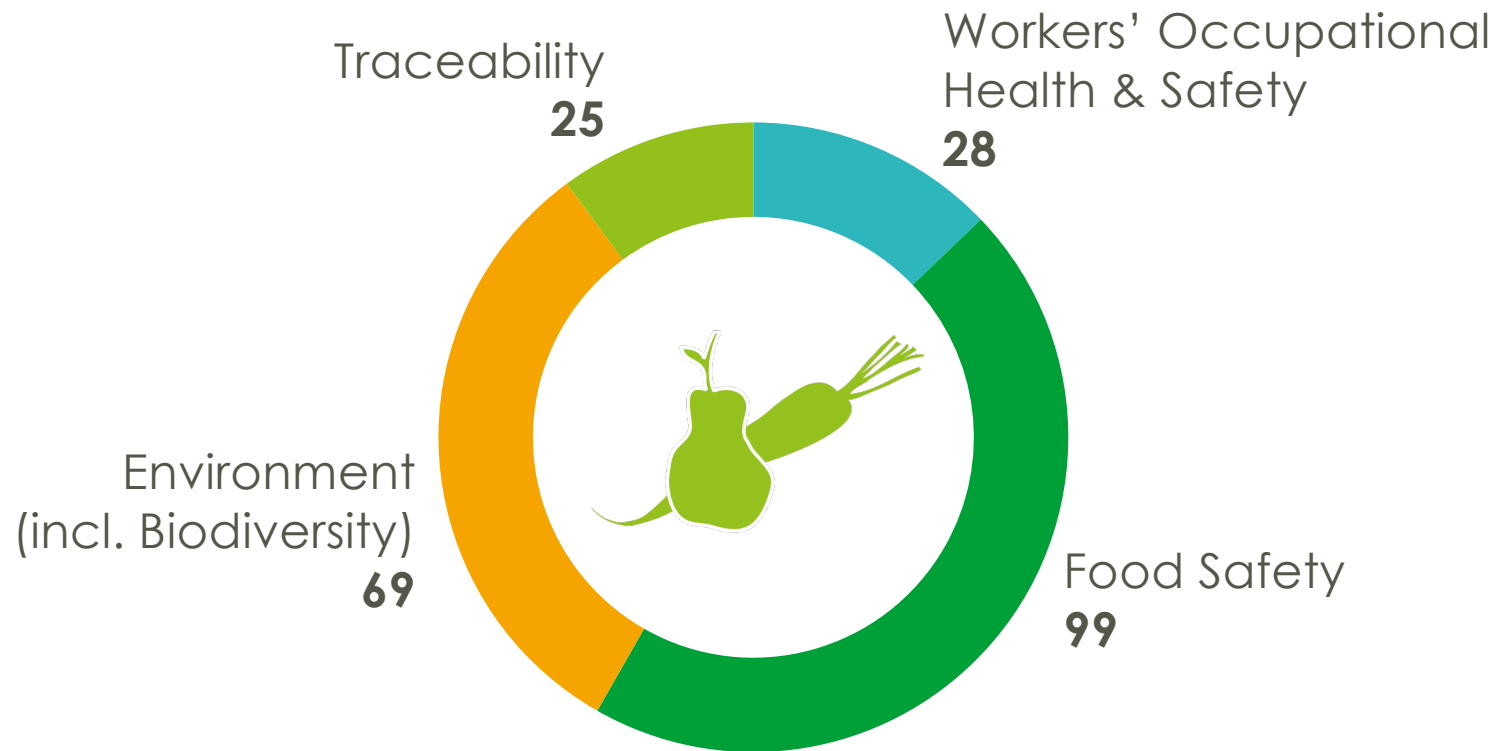
GLOBALG.A.P. FRUIT & VEGETABLE STANDARD V5

The First Choice for Retailers and Producers around the World



HOLISTIC APPROACH – FRUIT & VEGETABLES

Total Number of Control Points: **221**



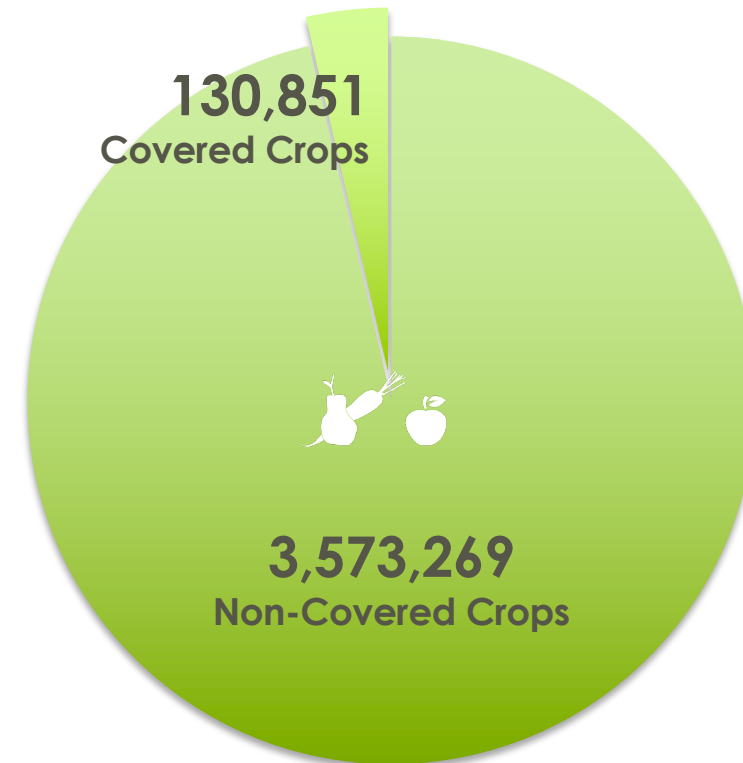


GLOBALG.A.P. FRUIT & VEGETABLE STANDARD V5

The First Choice for Retailers and Producers around the World



Producers under
Certification April '19

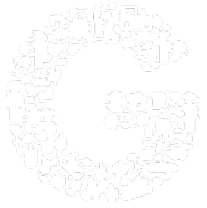


Amount of certified
products in hectares April '19

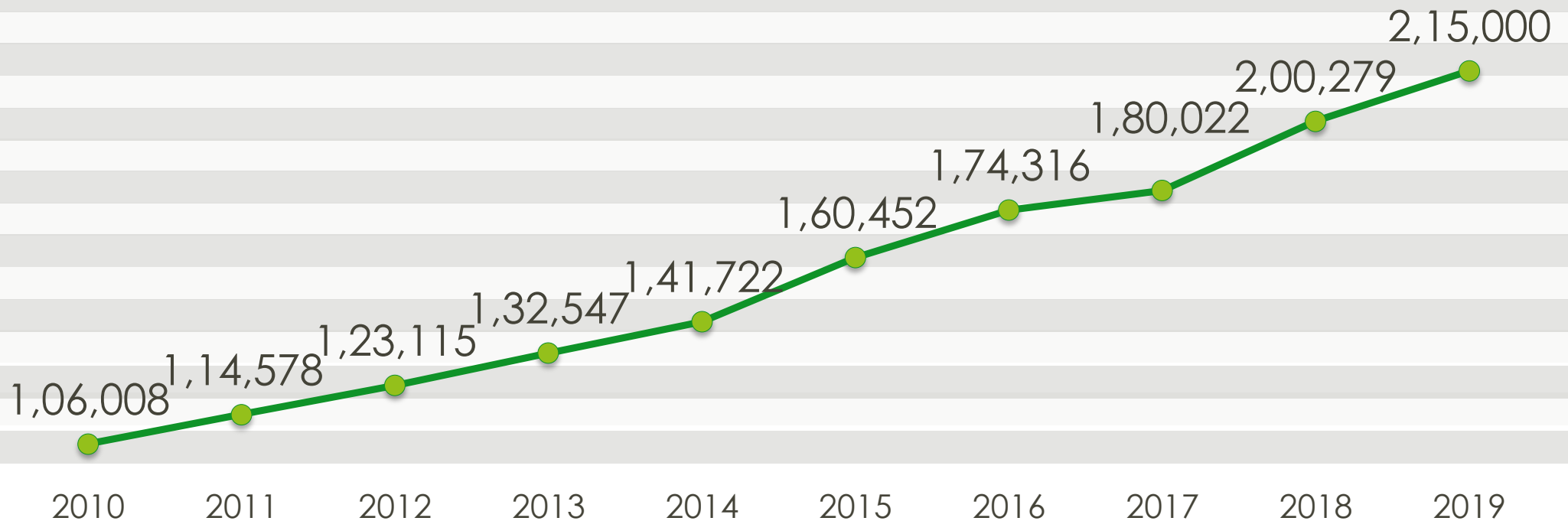


GLOBALG.A.P. CERTIFICATION WORLDWIDE

A Steady Growth for Integrated Farm Assurance (IFA) Version 5.2



Total Number of Producers Under Certification Worldwide



Updated 31.12.2018

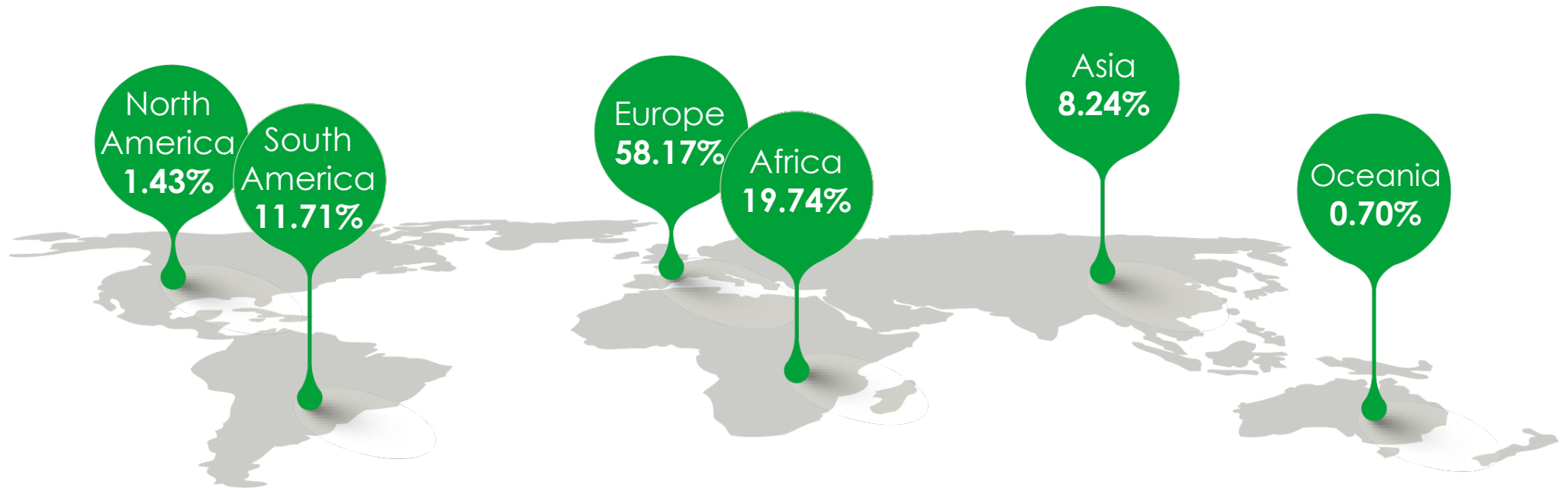


GLOBALG.A.P. CERTIFICATION WORLDWIDE

A Steady Growth for Integrated Farm Assurance (IFA) Version 5.1



SHARE OF PRODUCERS UNDER CERTIFICATION PER REGION IN %





And finally.... back to China....



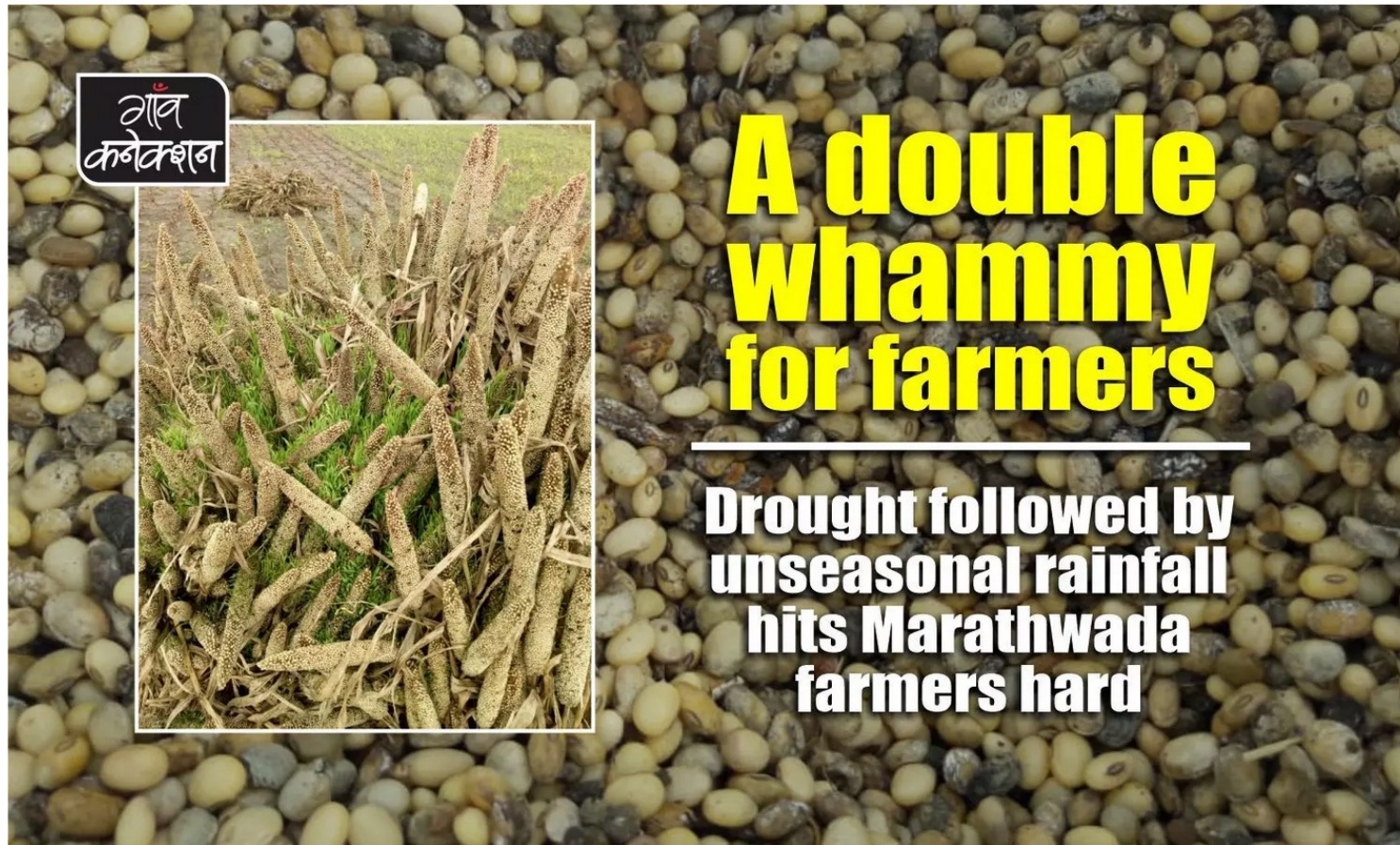


What about SUSTAINABILITY?





WATER: Climate stress is impacting on production and markets



Source: <https://www.ganonconnection.com>



FOOD SECURITY: Food supply chains are at risk



BY MIKE KNOWLES @mikefruitnet

Friday 10th August 2018, 14:54 London



Banana trade 'losing fight against TR4'

Leading authority on fungal disease threatening to wipe out Cavendish bananas says variety's days are numbered

The global banana industry is failing to tackle the creeping menace posed by the fungus TR4, to the extent that the world's most widely traded banana variety Cavendish has zero chance of survival, according to one of the leading authorities on the disease.

In an exclusive interview with Fruitnet's Mike Knowles and Michael Barker, respectively editors of EUROFRUIT and FRESH PRODUCE JOURNAL, Professor Gert Kema of Wageningen University & Research says that current efforts to save Cavendish, which is propagated by conventional vegetative reproduction rather than through sexual reproduction, have no real chance of success.

"The industry is losing," he suggests. "[The industry] has neglected



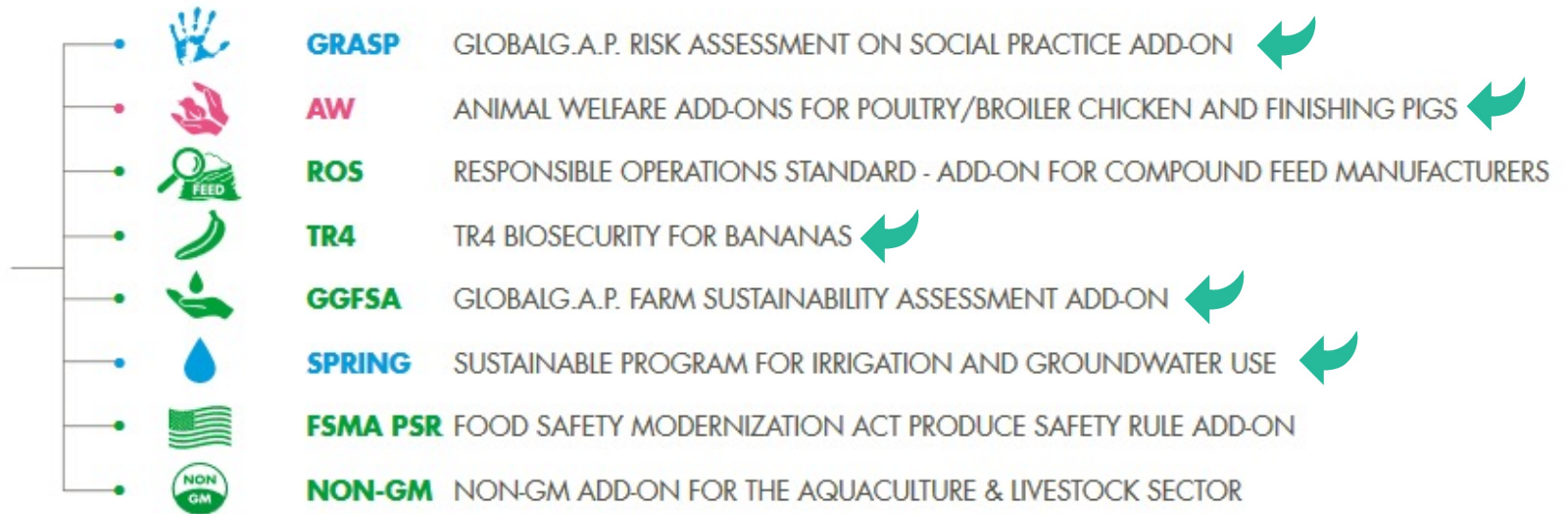
Professor Gert Kema, WUR

RELATED ARTICLES

- 1 Scientists identify TR4-resistant bananas



MORE SUSTAINABILITY with GLOBALG.A.P. ADD-ONS





GLOBALG.A.P.

GLOBALG.A.P. RISK ASSESSMENT ON SOCIAL PRACTICES

GRASP





The GLOBALG.A.P. Solution: the GRASP Add-on



- A **farm-level** social management tool for global **agricultural** supply chains
- Covers all **social** criteria covered by **ILO core labor conventions**
- Raises **awareness** of **social compliance** and highlights **improvements**
- Based on **country-specific interpretation guidelines** of local legislation
- An **affordable assessment system** for all farm types – including smallholders

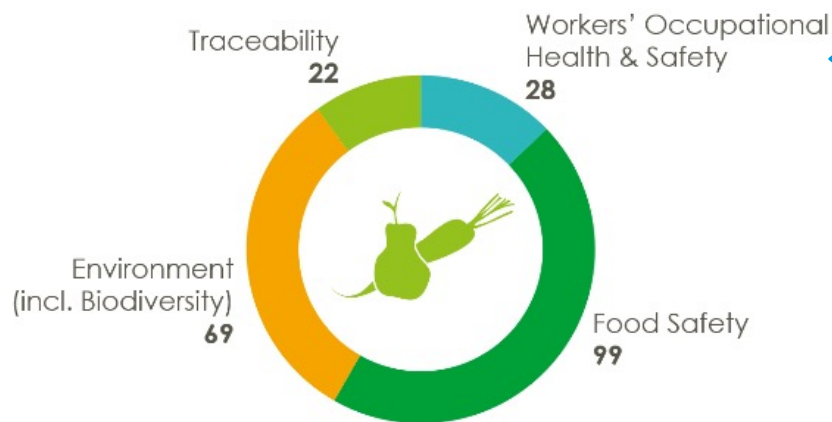


The Basis for GRASP: GLOBALG.A.P.'s IFA Standard



FRUIT & VEGETABLES

Total Number of Control Points: 218



The GLOBALG.A.P. Integrated Farm Assurance (IFA) standard already contains control points on Workers' Occupational Health & Safety.



The GRASP add-on builds on these control points.

11 + 1 GRASP control points in key topics of social practice





Increasing Demand for GRASP Assessments Worldwide













Number of GRASP assessed producers in total.
Last updated: April 2019





GRASP Assessment Result in Detail (Pdf Report): Control Point Level



N°	CONTROL POINT & COMPLIANCE CRITERIA	VERIFICATION	COMPLIANCE		
			Y	N	N/A
TIME RECORDING SYSTEM					
10	<p>CP: Is there a time recording system that shows daily working time and overtime on a daily basis for the employees?</p> <p>CC: There is a time recording system implemented appropriate to the size of the company that makes working hours and overtime transparent for both employees and employer on a daily basis. Working times of the employees during the last 24 months are documented. Records are regularly approved by the employees and accessible for the employees' representative(s).</p>				
10.1	A time recording system is implemented, appropriate to the size of the company (e.g. time record sheet, check clock, electronic cards, etc.).	 	X		
10.2	The records indicate the regular working time for employees on a daily basis.		X		
10.3	The records indicate the overtime hours as defined by contracts per legislation for all employees on a daily basis.		X		
10.4	The records indicate the breaks/festive days for the employees (on a daily basis).		X		
10.5	The working records are regularly approved by the employees (e.g. regularly signed record sheet, checking clock).		X		
10.6	Access to these records is provided to the employees' representative(s).	  	X		
10.7	The records are kept for at least 24 months.		X		
COMPLIANCE LEVEL CONTROL POINT 10: <i>(Calculated automatically based on the results per sub-controlpoint)</i>			Fully compliant		
Evidence/Remarks:					
Corrective Actions:					



Sample Result of Web Database Search for GRASP compliant Producers



GGN	Reg.No	Company Type		Name1/Last Name		Name2		Name3	
4049929	DNV CER	EUROPGAPVENSINCERT		Producer					
Integrated Farm Assurance (IFA)									
Certification Body / Producer Group		Name1	Name2	Scheme	Certificate (online)		Certificate (PDF)		Checklist (PDF)
					Current	Next	Current	Next	Current
DNV		DNV GL Business Assurance Italia S.r.l.		GLOBALG.A.P.	en		en		
Crop based Fruit and Vegetables									
Product	GLOBALG.A.P. certificate no.	Cycle	Status	Certified/assessed process	Valid to	Non Covered Crops First Harvest in hectares		Non Covered Crops Further Harvest in hectares	
Apples	00066-0002	Current	certified	Yes	01/10/2019				
Attributes current cycle									
Harvest Included		Included							
Product Handling		No							
Parallel Production (PP)?		No							
Parallel Ownership (PO)?		No							
GLOBALG.A.P. Risk Assessment on Social Practice (GRASP)									
Certification Body / Producer Group		Name1	Name2	Scheme	Assessment (PDF)				
					Current	Next			
DNV		DNV GL Business Assurance Italia S.r.l.		GRASP	en				
GRASP GRASP									
Product	GRASP assessment no.	Cycle	Status	Overall assessment result	Scheme GR	Scheme CPCC		Option	
GRASP	00066-I0002	Current	assessed	Fully compliant	GRASP General Rules v1.3	GLOBALG.A.P. Risk Assessment on Social Practice Checklist v1.3		1	
Attributes current cycle									
Product Handling		No							



Benefits of GRASP



- Helps **identify** and **mitigate social risks** in agricultural supply chains
- Helps growers **improve social risk management**
- Adapted specifically for **farm-level realities – including smallholders**
- Improves **transparency** and **risk monitoring in the supply chain**
- Applicable **globally** for **all GLOBALG.A.P. scopes**



GRASP: Future Direction & Design



- Introducing risk categories for countries
- Introducing formal and structured worker interviews
- Revising standard setting & compliance criteria
- Pursuing SSCI recognition
- Enhancing capacity building activities
- Collaboration with other social schemes (SEDEX, BSCI)



WATER





WATER: Where do we have water risks?



These maps show where water-related risks are most severe.

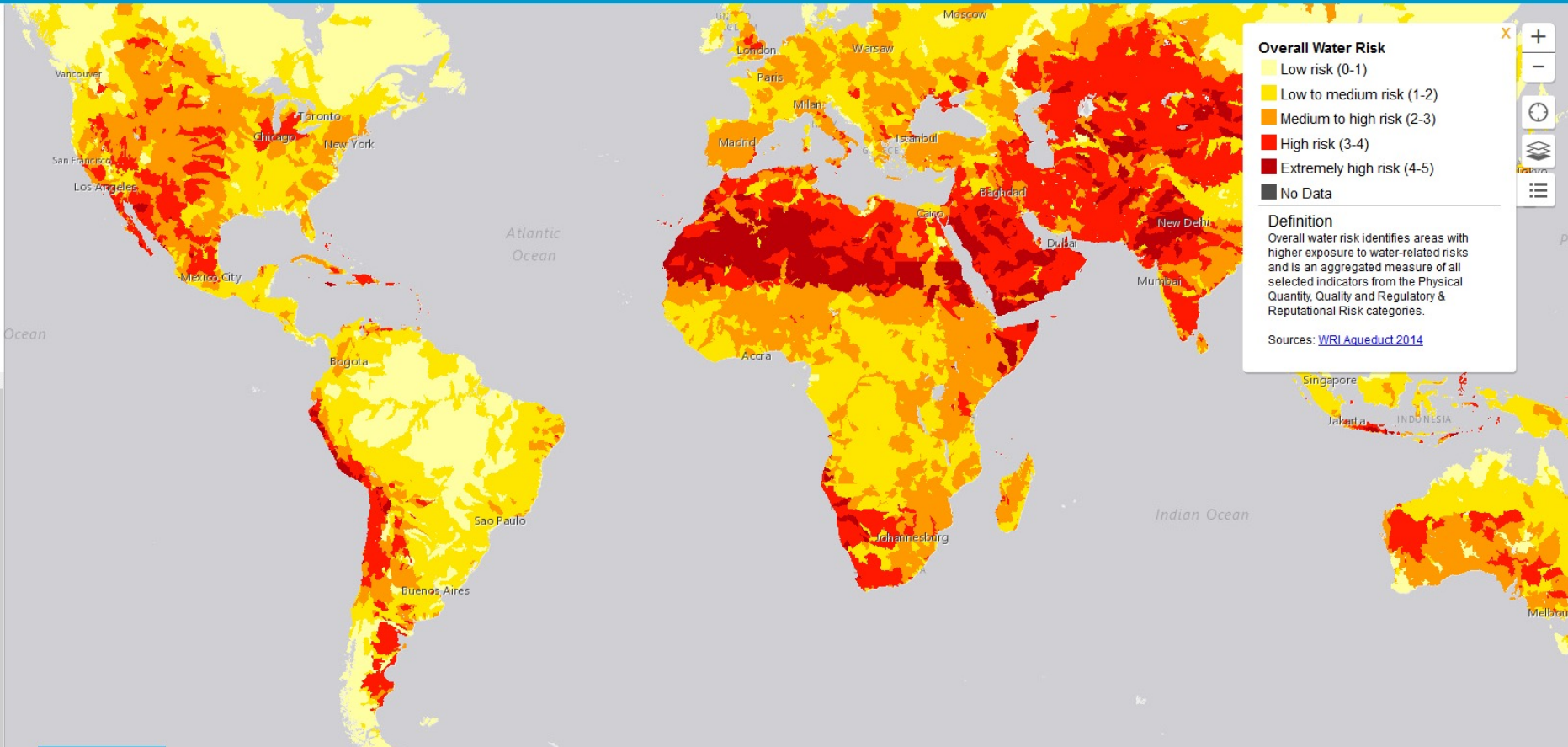
Map Transparency
100% none

Weighting Scheme:
Default
 Customize Weights

Weight Distribution



- Overall Water Risk
- Physical Risk Quantity
 - Baseline Water Stress
 - Inter-annual Variability
 - Seasonal Variability
 - Flood Occurrence
 - Drought Severity
 - Upstream Storage
 - Groundwater Stress
- Physical Risk Quality
- Return Flow Ratio



Overall Water Risk

- Low risk (0-1)
- Low to medium risk (1-2)
- Medium to high risk (2-3)
- High risk (3-4)
- Extremely high risk (4-5)
- No Data

Definition
Overall water risk identifies areas with higher exposure to water-related risks and is an aggregated measure of all selected indicators from the Physical Quantity, Quality and Regulatory & Reputational Risk categories.

Sources: [WRI Aqueduct 2014](#)



SPRING: Sustainable Program for Irrigation and Groundwater Use

The SPRING Add-On is used to assess sustainable water management criteria:

- Legal conformity of water sources
- Legal conformity of extraction rates
- Best practices in water management
- Protection of water sources
- Monitoring of water consumption
- Impact of producers on sustainable watershed management





MORE SUSTAINABILITY with GLOBALG.A.P. PARTNERSHIPS

Case Study Partnership with Sustainable Rice Platform

Goal To build a viable assessment and assurance program for the SRP

Solution GLOBALG.A.P. will manage the SRP Assurance Scheme from 2020

Benefit Cost-efficient assessments for rice farmers and farmer groups around the world.



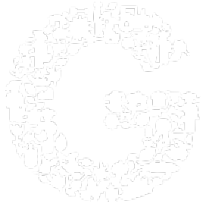
Images: Kristian Moeller (right), CEO of Global GAP signing the agreement
Ignacio Antequera (3 from right), Technical KAM Leader in a panel discussion
2nd Global Sustainable Rice Conference October 2019



Can certification improve access to local markets?



Can certification improve access to local markets?





CAPACITY BUILDING: helping farmers achieve certification



GLOBALG.A.P. Technical Key Account Manager, Mahinda Wahome training growers as part of a capacity building project co-financed by GIZ (2019).



From PRIMARY FARM ASSURANCE (PFA) to IFA

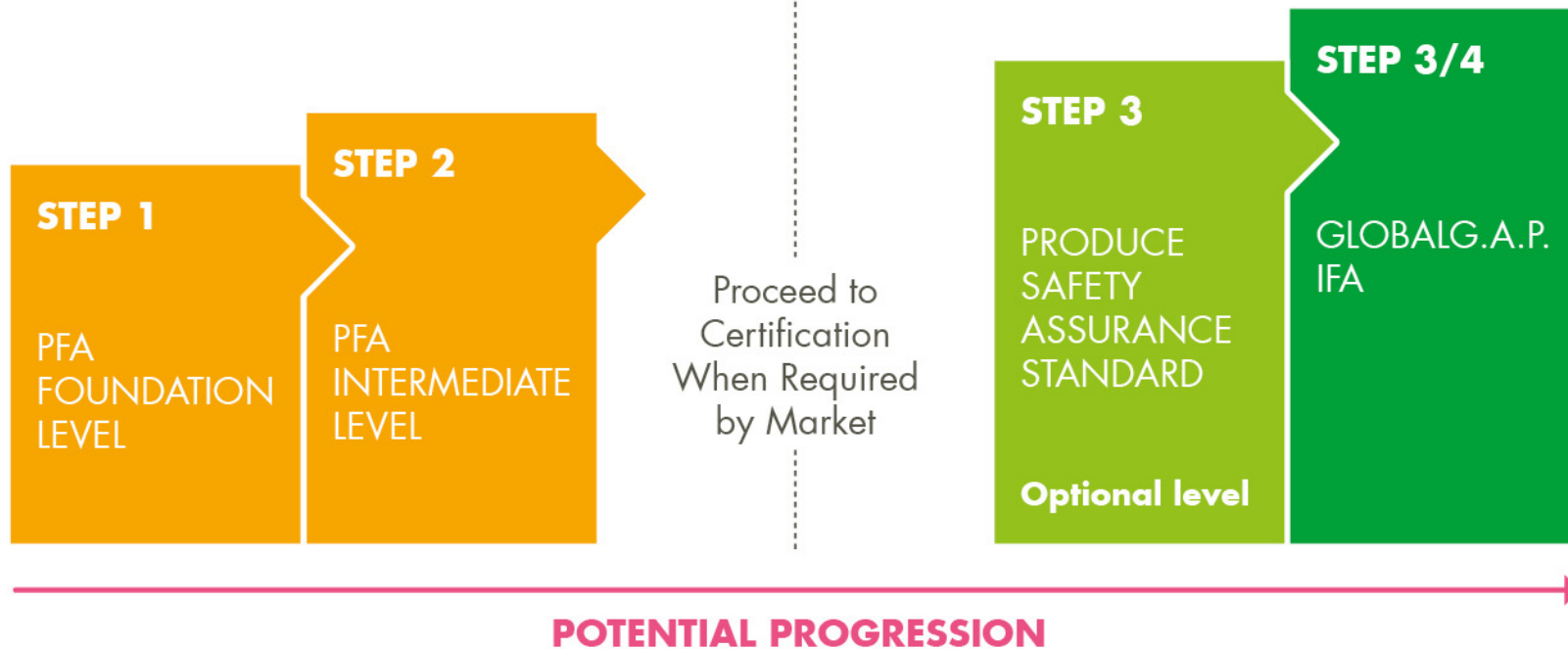
A step by step approach to market access

ASSESSMENT

PFA: Primary Farm Assurance

CERTIFICATION

IFA: Integrated Farm Assurance



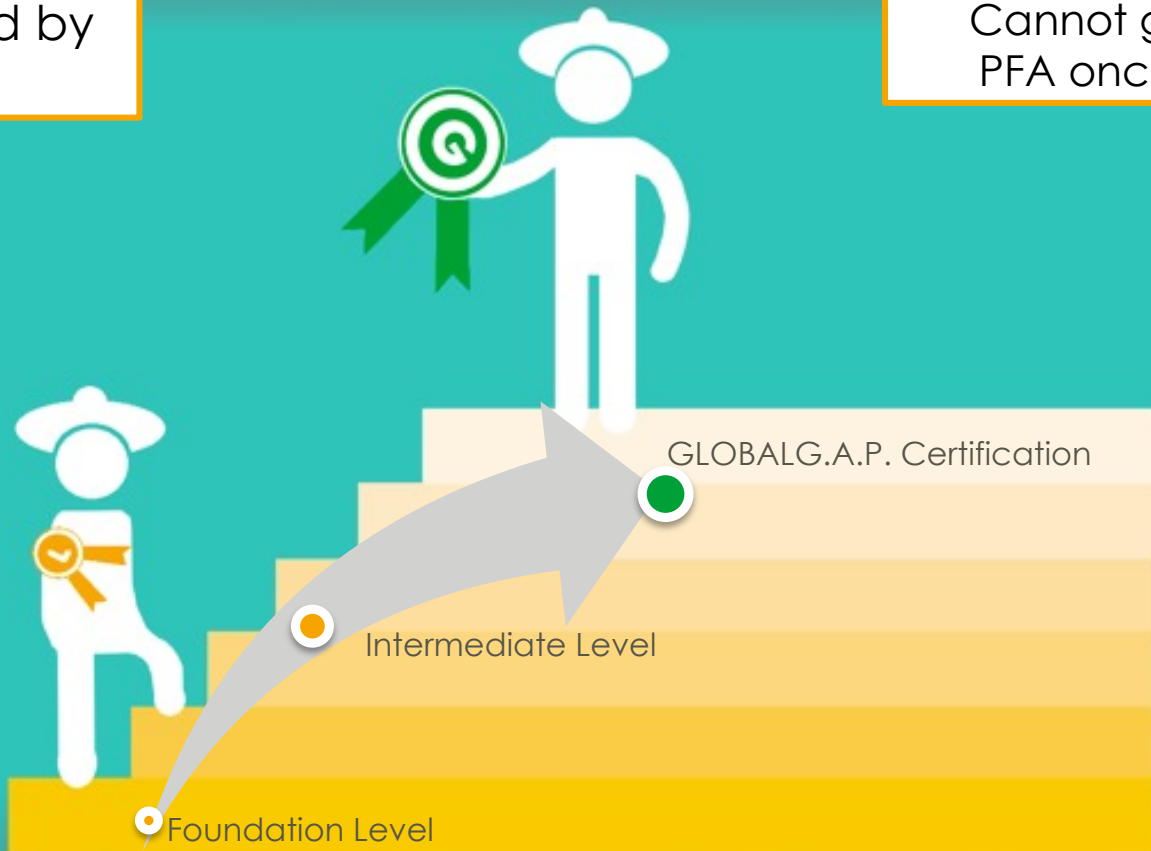


From PRIMARY FARM ASSURANCE (PFA) to IFA

A step by step approach to market access

End goal defined by market

Cannot go back to PFA once certified

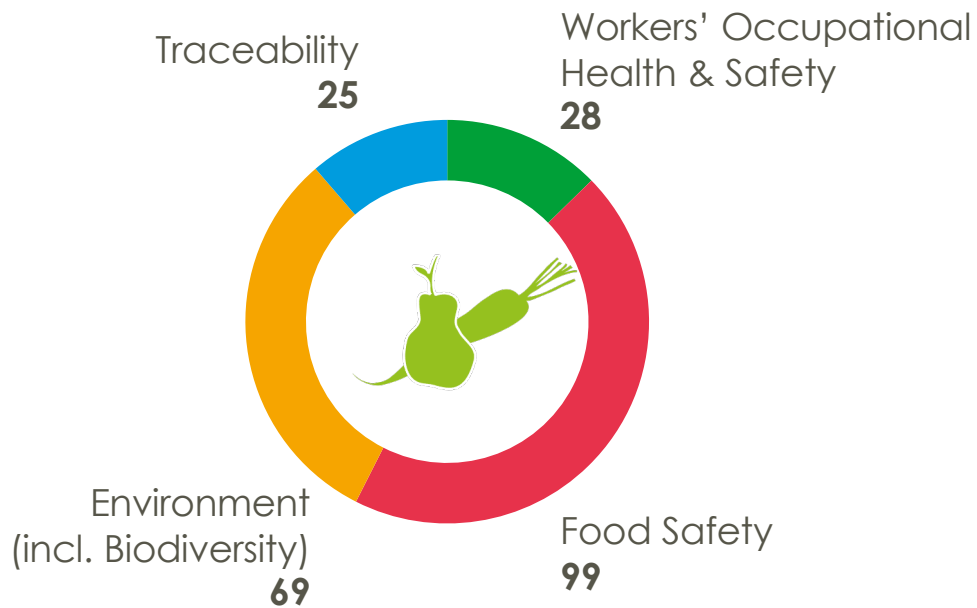




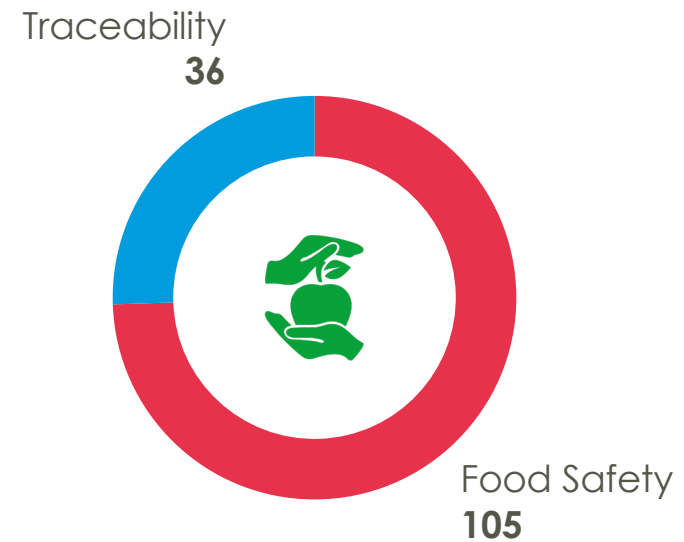
“FOOD SAFETY FIRST”: PRODUCE SAFETY ASSURANCE STANDARD



IFA Fruit & Vegetables standard Control Points: 221



Produce Safety Assurance standard Control Points: 141





FOOD SAFETY FOCUSED CROP BRAND IN BANGLADESH



Shuddho, meaning “Pure” is the first food safety crop brand in Bangladesh.

Sourcing from a trained farmer base,
Shwapno communicates **G.A.P. benefits to consumers.**



Thank you for your kind attention



Jitendra Mandrah

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