

Enough
The Fight for a Food-Secure Tomorrow


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#FeedThe9

ENOUGH Elanco

3 Categories of Audience Challenges When Presenting the "Global Future"

- "My focus is here and now" – I'll worry about the future when it comes
- "It's not my problem"
- "I can't relate": Providing a sense of size & scale – recognizing that macro economics is not the sum of micro economics

A Snapshot of Our Greatest Challenge....



GM Food Forward

Shifting our Paradigms

Hunger	Food Security
Crisis	Solutions
Listening	Taking Action
Discussion	Movement

I have had **ENOUGH**

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The Faces of Food Security

Disease	Development	Decision
The Collapse <ul style="list-style-type: none"> 25,000 die daily from hunger <p><i>"How do I choose which child to feed?"</i></p>	The Deficiency <ul style="list-style-type: none"> No meat in the diet <p><i>"With food like this, my people can't thrive."</i></p>	The Hunt <ul style="list-style-type: none"> Daily search for the meal <p><i>"Where and when will I get my next meal?"</i></p>
The Quality <ul style="list-style-type: none"> Getting the right calories <p><i>"I wish we had a good grocery store."</i></p>	The Edge <ul style="list-style-type: none"> Temporary life event creates short term need <p><i>"What happened?"</i></p>	The Tradition <ul style="list-style-type: none"> Preserving access to choice <p><i>"It's part of who we are."</i></p>

Availability Access

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Food Security is a Tipping Point

- "[Food insecurity] is the principle threat to global security. Failure to address food insecurity will lead to increasing tension."

*Dr. Alastair Summerlee
President, University of Guelph, Canada*
- "When trade crosses borders, armies do not!"

*Cordell Hull
U.S. Secretary of State, 1933-1944
Nobel Peace Prize Laurite, 1945*

The Tipping Point

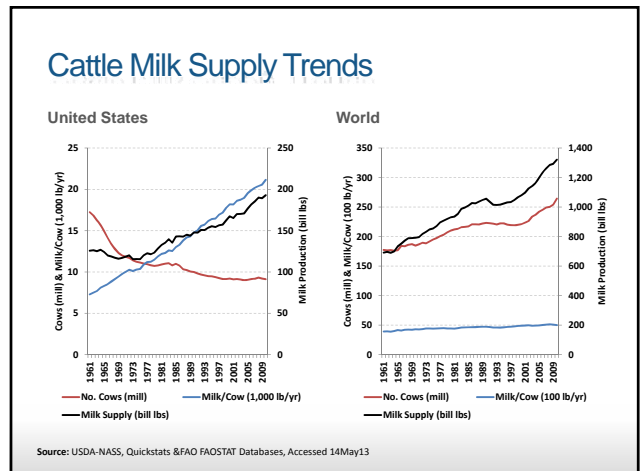
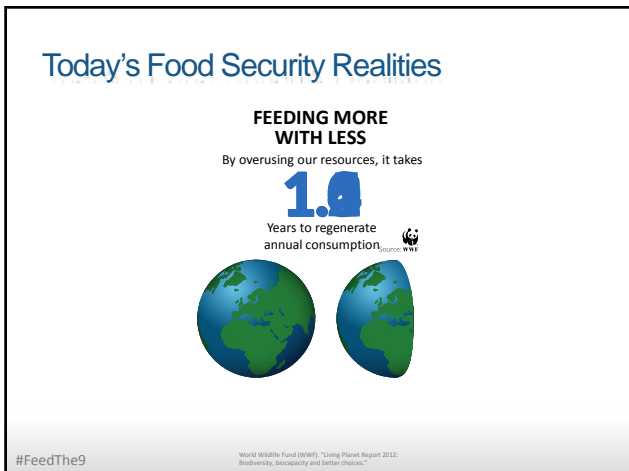
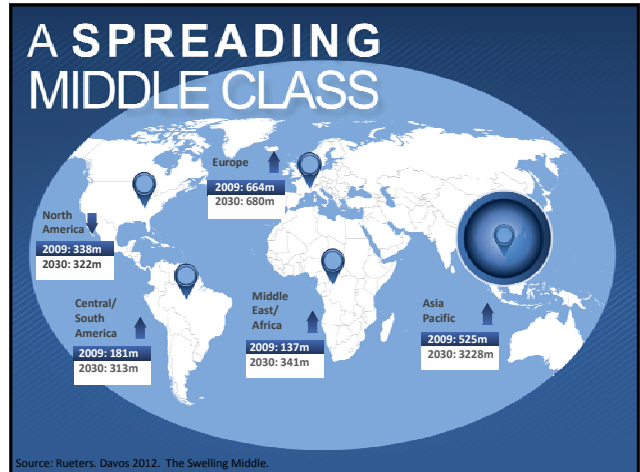
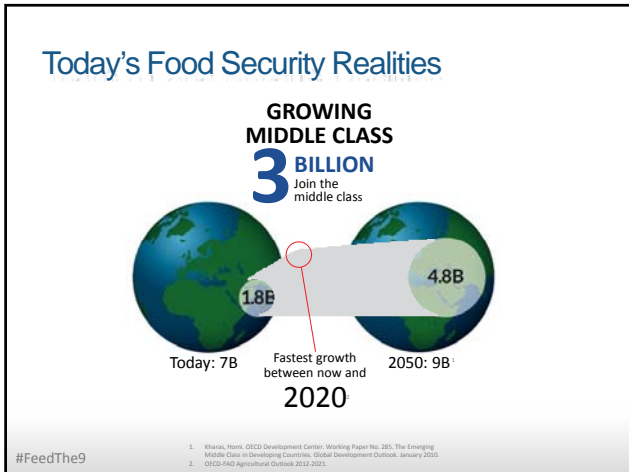
Undernutrition and Obesity
Production Disruptions
Continued Deforestation
Toppling Governments
Severe Hunger Looms
Changing Practices = Less Growth in Organic
Skyrocketing Egg Prices
Infant Formula Rationing
Civil Unrest
Reverse Trade
Food Security = Global Stability

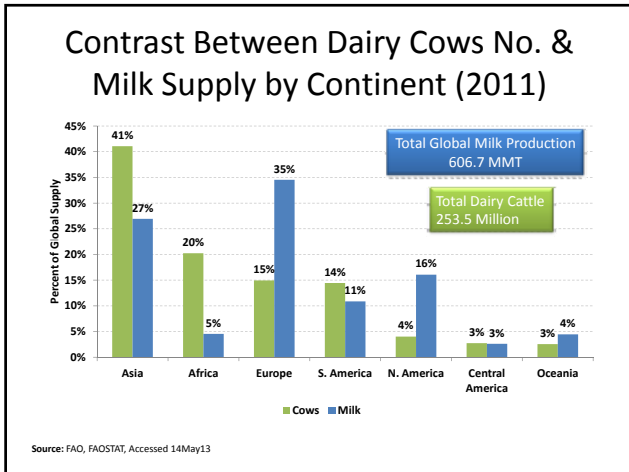
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Our Vision for a Food Secure World

Stronger countries
More nutritious
ACCESS Milk, meat & eggs for all
AFFORDABLE Better food, better prices
HEALTHY Less disease, bigger opportunity
Greater human
Reduced poverty
RESOURCES Feeding more with less
STABILITY Predictable food flows, unimpeded

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Today's Food Security Realities

INCREASING DEMAND FOR MEAT, MILK & EGGS

We will need **60%** More animal-sourced foods

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Food & Agriculture Organization (FAO), "World Livestock 2011: Livestock in Food Security," Rome, 2011.

The Challenge: Demand is Outpacing Supply

Dairy productivity has doubled in the past 50 years, but it's not keeping pace with population growth.

Globally, we have **14 percent less milk** per person than in 1961.

Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Report, 2011. Data on File.

Filling the Dairy Gap

Current path would add **40 million more dairy cows**, but not meet needs.

Choose organic: +60 million cows or more

Stop accepting new innovation: +104 million more cows

What will it take to fill the gap?

1 Cow → 32 glasses of milk currently produced each day + HALF a glass of milk to meet future demand = Enough Milk

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

The Innovative Path: Is It Possible?

Producing more milk to meet demand

Examples:

- Fresh, clean water
- Feed optimization
- Vaccines
- Disease control
- Improved housing
- 3x a day milking
- Long-day lighting

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

Using innovation, not adding cows, would save:

Applying Today's Technology Saves Precious Resources – Dairy Producers Could Save:

- 66 Million Cows
- 747 Million Tons of feed
- 388 Million Acres of farmland
- 618 Billion Gallons of water

Equivalent of Alaska

The annual domestic use of Germany, France and the UK combined

We can freeze the footprint and have 66 million fewer cows. What's missing is many farmers can't take advantage of current innovations, practices or products. Solutions exist; access doesn't.

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

The Egg Story

6.5 billion hens produce 186 eggs each annually

For decades, production increased 1 3/4 eggs/year

Since the late 1990s the productivity trend has reversed due to disease, changing practices, removing innovation. .8 eggs/year

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

Hen Population Outpacing Production

Today, we're meeting demand by adding hens. On this path, hens will double to meet 2050 demand.

1992 Today 2050

Instead we can bring back innovation and help hens produce more.

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

What will it take to meet demand?

Just ONE more egg per hen per year

This helps meet demand and Requires 4 billion fewer hens.

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

Using innovation, instead of adding hens, would save:

- Adding 1 egg/hen/year means 4 Billion fewer hens
- 113 Million Tons of feed
- 74.4 Billion Gallons of water
- 65 Million Acres of farmland
- Equivalent to the size of Colorado
- Annual household water use for 2x the population of Philadelphia

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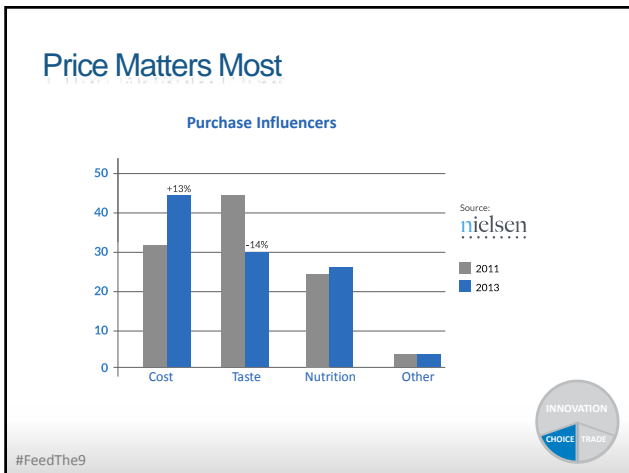
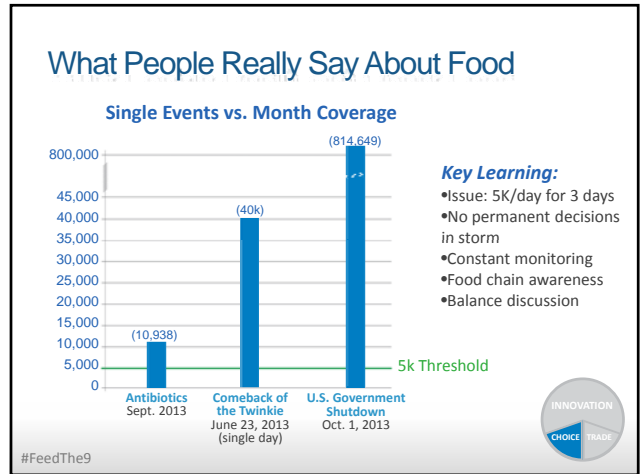
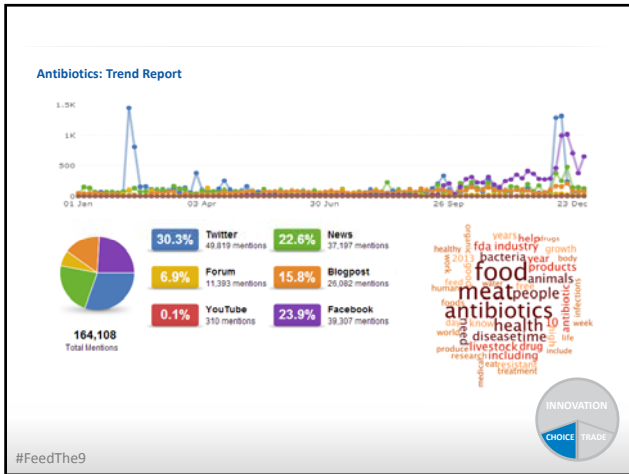
Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Analysis, 2013, Data on File.

Our Vision for a Food Secure World

Where there is no vision, people perish.

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Trade Increases Sustainability

Food Must Move

Growing food in places with resources and moving it to places that need it Provides *sustainable*, affordable food in countries that can't produce it.

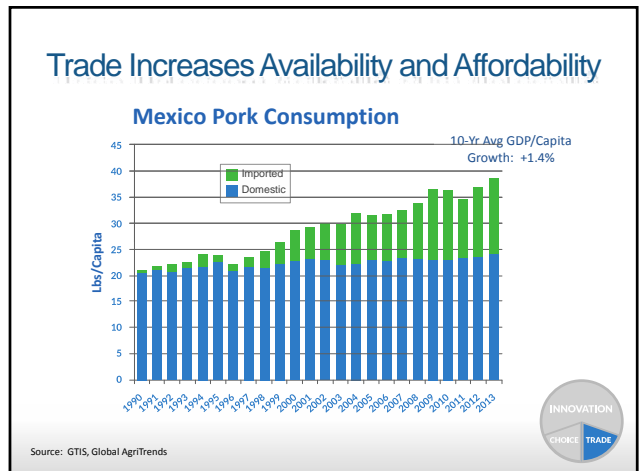
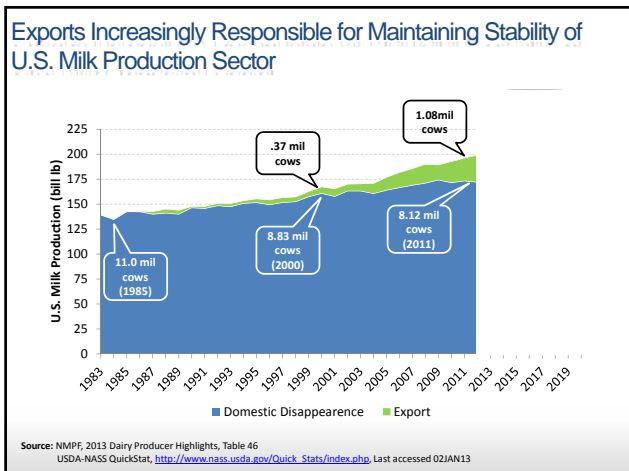
Transportation = less than 4% of environmental impact of food production

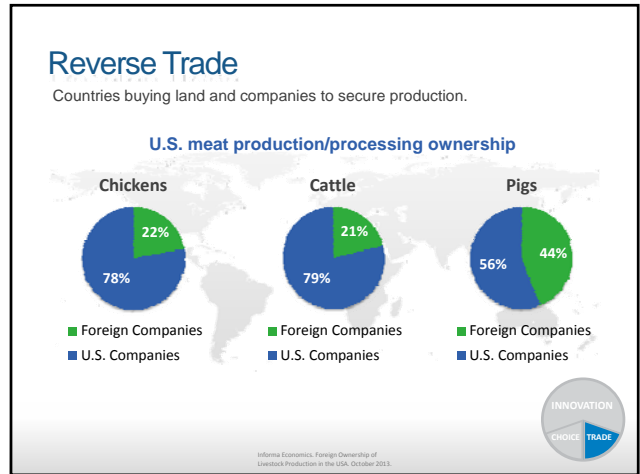
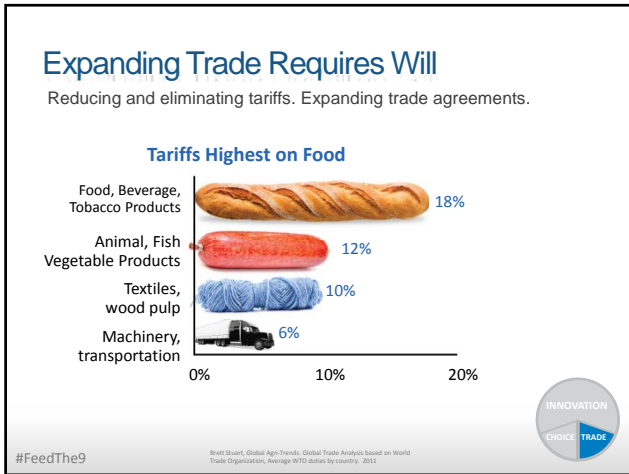


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Without Sustained Demand:



Take Action

Go to SensibleTable.com to join the movement, including:

- Sign** and share the ENOUGH declaration
- Post** the ENOUGH Twibbon on your social profile
- Engage** – Download the ENOUGH toolkit. Connect with a Face of Food Security.
- Join** the #Feedthe9 conversation on Twitter.

www.sensibletable.com

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ENOUGH

www.sensibletable.com
 @jeffsimmons2050
 @elanco

We've had enough. If you have too, join us.
 It's time we #FeedThe9.



Our Mission

ENOUGH – A MOVEMENT

It's time we solved the greatest issue of our time – food security.

We have the solutions. We must act together. We must act now.

The world is growing. Quickly. And we're not just talking about adding more people, but more people with better lives. Estimates show the global middle class growing another 3 billion by 2050. All with better lives. This is one of the most positive stories in the world today!

But, experts say: We're headed towards a crisis where there won't be enough to feed all these people. They believe we simply don't have enough resources to grow enough crops or to produce enough livestock to provide quality diets to the middle class.

We disagree! Different than most problems, there are solutions. There can be enough. We believe we have a role to play in ensuring this story.

There are enough innovative solutions to deliver enough food. Or we have enough courage, enough leadership and enough agency to make it happen! We're not headstrong, we're factual about our disagreement: enough.

We can reverse these trends. But now is the time to act. (by 2050 we will know if we can deliver enough. With the right strategies, the right science-based policies, and the right innovative solutions, we can ensure we will have enough... without using too much of our resources. By 2025, we can ensure a positive ending to this story. It will take solutions like innovation, choice and faith.)

Our vision is a food secure world – a world where 9 billion people have access to enough nutritious, affordable food. There are fewer deaths from hunger, less disease. Less obesity. More human potential realized. Countries are stronger. The world is more peaceful. We stop worrying our resources. Children grow up healthy, active, smart and strong.

We've had enough. We have just enough time. To act. To change. It's time we diversified! Please join us at sensibletable.com and engage in the conversation. **Together we'll rewrite the story.**

Join the movement!

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Food & Agriculture Organization (FAO), "How to Feed the World in 2050" Rome, 12-13 October 2009.

Enough Movement Aspirations

In the First Year:

- 1 Expanding our Message - Food Security
- 2 Creating Positive Impressions - 1 Million/Week
- 3 Building a Movement - 10,000+ Individuals Committed
[Sign up- sensibletable.com](http://sensibletable.com)
- 4 Supporting & Advancing Innovation - 1 Billion More Fed
- 5 Breaking the Cycle - 100 Communities

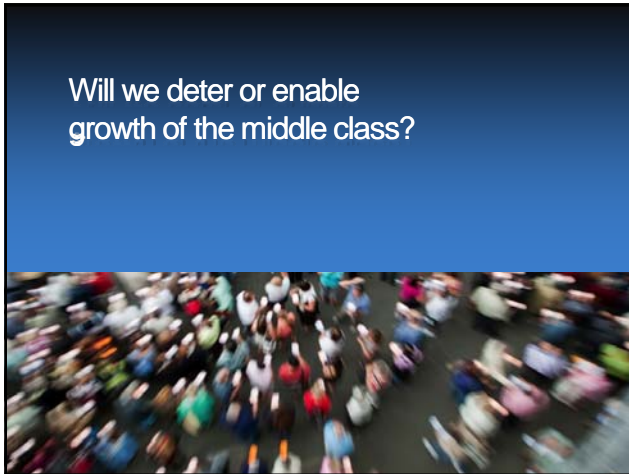
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A Growing Gap

Based on our current trends nearly **half the population – 4.5 billion** won't meet their nutritional needs.

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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Report, 2013. Data on File.



Food Security

- According to The United Nations' World Health Organization (WHO), food security is built on three pillars:

Food Availability



Food Access



Food Utilization



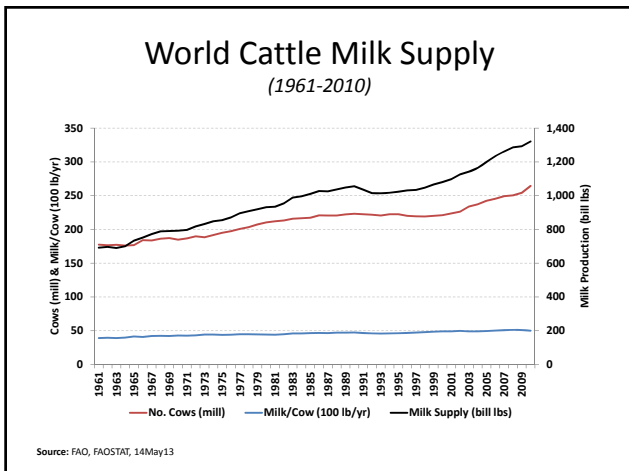
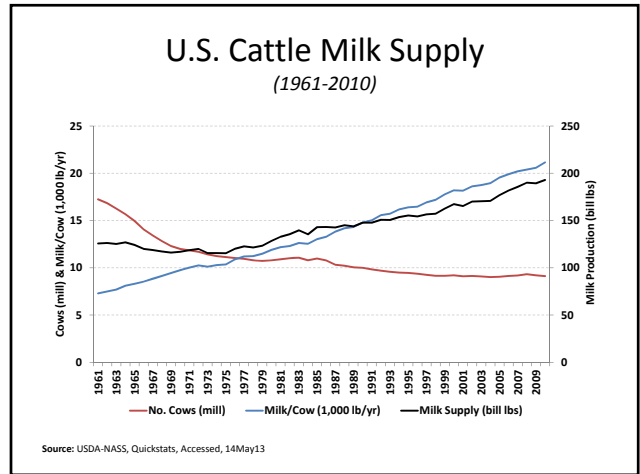
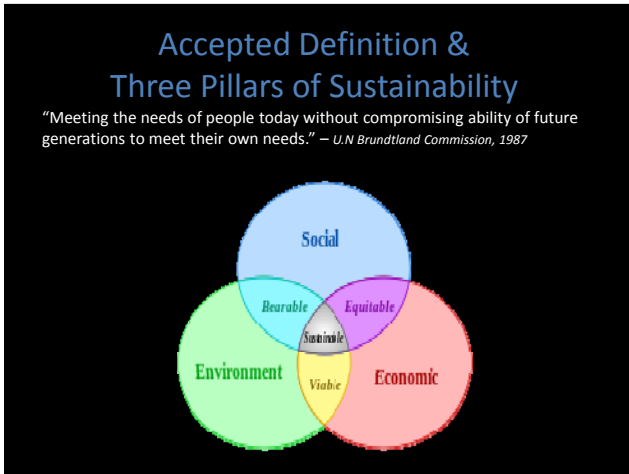
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Weldon, W., Finn, S. "Achieving Global Food Security: How the Nutritional Impact of Animal Source Foods Enriches Lives". 2013.

The Enough Report Distinctions

- **New Research**
 - 2013 Global Food Forward Analysis
 - International Consumer Attitudes Study: 2nd edition Spring 2013
 - The Nielsen Company: Consumer Purchase Behaviors
 - Food Chain Decisions in a Social World: New Ways to Measure What the Consumer Wants
 - Center for Food Integrity 2013 Hunger Solutions Survey
 - Achieving Global Food Security: How the Nutritional Impact of Animal Source Foods Enriches Lives
- **3 New Metrics:** better understand consumer attitudes and what they want when they make food purchases.
- **Call for action to join a movement.** More information available at www.sensibletable.com.

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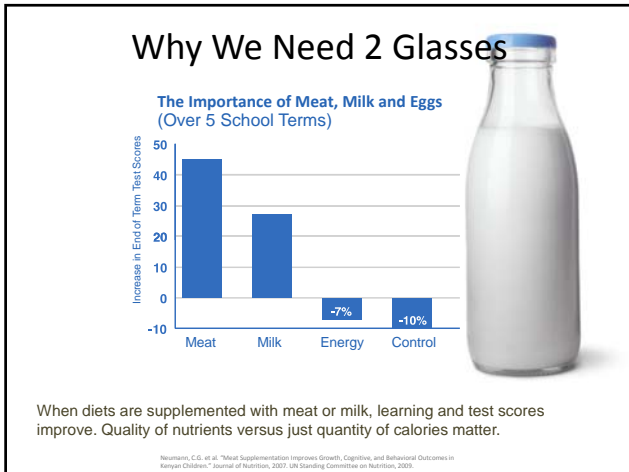
The Dairy Gap

What We Have

What We Need

We have 1 glass a day.
Everyone deserves 2 servings a day

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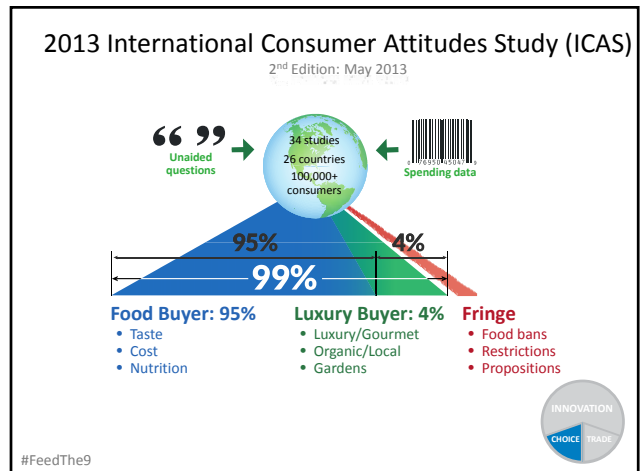


Consumer Opinion: How They Compare

Global Hunger Solutions: Consumer vs. Expert Views



POTENTIAL GLOBAL HUNGER SOLUTIONS (BASE)	CONSUMERS* (2,005)	International Experts** (16)
Policy that supports improved practices in the developing world	4.0	4.4
Adoption of Technology	3.9	4.2
Improved food distribution	3.9	4.1
Small holder farmer education on better practices	3.9	4.1
Policy that encourages technology application	3.8	4.2
Increasing organic production	3.6	1.7
Increasing food aid	3.5	2.5

*The consumer scale was converted from a 0 to 10 scale to a 1 to 5 scale to allow qualitative comparison with the expert data
**The international expert data was collected in a study conducted by The Center for Food Integrity; these data are qualitative in nature due to the small sample size; caution is advised in comparing and projecting these data



Impact of Luxury

- Is it fair – or justifiable – for shoppers living in comfort to disregard innovations that can help feed more of their neighbors?
- Research shows:
 - Organic require 25% more land to produce same quantity as conventional
 - No health or nutrition differences
 - No adverse health effects from billions of meals containing GMOs
- Must bring reality back into the equation



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Dr. Roger Cady, Elanco Animal Health, 2013 Food Forward Report, 2013, Data on File.