Ceres

Ceres ROADMAP 2030

ABOUT CERES

Ceres is a sustainability nonprofit organization working with the most influential investors and companies to build leadership and drive solutions throughout the economy. Through powerful networks and advocacy, Ceres tackles the world's biggest sustainability challenges, including climate change, water scarcity and pollution, deforestation, and inequitable workplaces. Our mission is to transform the economy to build a sustainable future for people and the planet.
For more information, visit ceres.org.

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This is the decade. We must choose our future. TODAY.

We are at a precipice.

Global sustainability threats—from the climate crisis to water scarcity to racial, gender and economic inequity—grow more urgent with each passing day and are already undermining the well-being of our planet and its people. Just like the COVID-19 pandemic, the risks before us are known, they've been predicted and they threaten to disrupt corporate operations and supply chains, destabilize financial systems and economic opportunity and cause widespread suffering across global communities.

The decade ahead, more than any other, represents a turning point in our history. While there is no time to waste, there is still time to change course.

Once considered tangential to business decision-making, environmental, social and governance factors have now become business imperatives—and, for those companies with foresight, sustainable business strategies are also a pathway to stable, profitable, long-term economic growth and social prosperity. As the operational, reputational and financial risks of 'business as usual' become clear, along with the opportunities created by the transition to an equitable, circular and zero-emissions economy, the questions companies are increasingly asking are:

What does a just and sustainable company look like in the decade to come? And what must we do now to get there?

The **Ceres Roadmap 2030** presents a vision for sustainable business leadership. It provides a practical 10-year action plan to help companies strategically navigate this new and ever-changing business reality and thrive in the accelerated transition to a more equitable, just and sustainable economy.

The Ceres Roadmap 2030 calls on companies to not only embed sustainability into how they do business, but to redefine the role of corporations as advocates for changing the institutions that shape corporate decision-making. It outlines the specific actions needed today and in the decade ahead to **stabilize the climate, protect water and natural resources** and **build a just and inclusive economy**. It maps out the critical steps companies should take to enable action by integrating sustainability into corporate governance, strategic planning and disclosure. In short, it helps companies move from commitment to impact. From words to results.

Achieving a more equitable, just and sustainable economy will require all stakeholders, including companies, investors, policymakers, regulators and non-governmental organizations (NGOs), to work together to challenge our outdated systems and policies and have the courage to replace them with those that better protect the people and ecosystems upon which our economy relies. The Ceres Roadmap 2030 calls on companies to look beyond their four walls to engage and collaborate with these stakeholders, as well as customers, suppliers, industry groups and communities to drive the systems-level change required to propel sustainable business practices with speed and scale.

The COVID-19 pandemic shined a light on the critical importance of preparedness, the incredible value of early and aggressive response and the necessity of persistent collective action. It also taught us a pivotal lesson: if we fail to act now to better prepare our economy against our greatest global threats, whether a deadly virus, systemic racism or a warming planet, they will continue to expose our vulnerabilities and disrupt life and business as we know it.

Fortunately, ingenuity is a limitless resource. Innovative and thoughtful solutions to these challenges have the power to spark an economic revolution, improving billions of lives and defining new ways of growing while supporting one another and the systems we depend upon. The road ahead will be full of challenges that are coming with certainty and ferocity—some we have in our sights, and some we must nimbly take on as they emerge. But with swift and appropriate action, we can and must chart a new course.

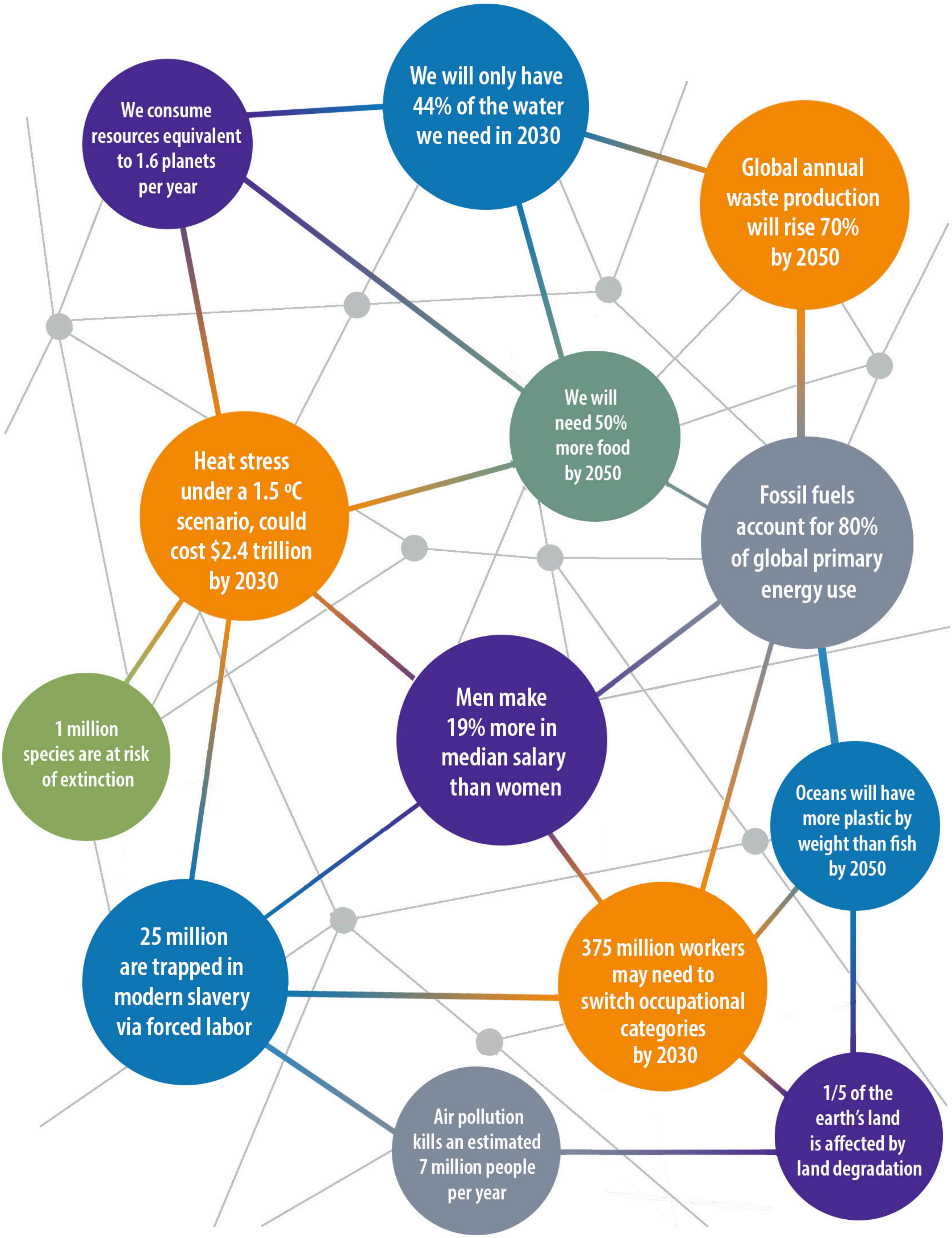
The Ceres Roadmap 2030 is a vision for sustainable business leadership and a plan for bold action in the decade ahead. Meeting the milestones mapped out in the action plan will not be easily accomplished. It will require a willingness to reimagine business as we know it, an openness to new and different partnerships, a flexibility to adapt to novel approaches and science, as well as a commitment to push the bounds of what is currently possible.

The world is rapidly changing. The **Ceres Roadmap 2030** will help companies to evolve, transform and successfully navigate toward a more equitable, just and sustainable future where **sustainability is the bottom line**.

‘Business As Usual’ has Changed.

Cape Town, South Africa warns of ‘Day Zero’ as the city prepares to run out of fresh water. California residents flee their homes because of air pollution from wildfires burning at record rates. More than a million Uighur Muslims are held in “de-extremification” camps, where they are forced to produce industrial and agricultural goods for export. Businesses—small and large—across the globe close their doors in the wake of the pandemic and millions lose their jobs. These are not problems that are thirty, twenty or even ten years out. They are here and they are now.

Environmental and social crises are not only imminent, they are intricately interconnected. As ecosystems degrade, people are forced to make difficult and, in some cases, impossible decisions. As people are mistreated and denied the resources to thrive, survival outweighs environmental stewardship. Failure to address one issue exacerbates the risk of another. However, the actions taken to catalyze positive change, to change the system and resolve fallibilities can have effects that amplify well beyond the action itself.


We consume resources equivalent to 1.6 planets per year
We will only have 44% of the water we need in 2030
Global annual waste production will rise 70% by 2050
We will need 50% more food by 2050
Heat stress under a 1.5 ºC scenario, could cost $2.4 trillion by 2030
Fossil fuels account for 80% of global primary energy use
1 million species are at risk of extinction
Men make 19% more in median salary than women
Oceans will have more plastic by weight than fish by 2050
25 million are trapped in modern slavery via forced labor
375 million workers may need to switch occupational categories by 2030
Air pollution kills an estimated 7 million people per year
1/5 of the earth's land is affected by land degradation

In 2015, world leaders adopted an ambitious set of priorities, the Sustainable Development Goals (SDGs), to build a better world by ending poverty, fighting inequality and injustice, and protecting the planet by 2030. The SDGs address the complexity, interconnectedness and systemic nature of our challenges, offering a common framework and language for corporations, governments, NGOs and other key stakeholders to move toward a shared vision for the future. The public and private sectors have taken steps toward achieving the SDGs, but more must be done, including greater allocation of capital, stronger policies, better governance and more ambitious and aggressive action.

The global sustainability threats addressed by the SDGs pose significant financial risks, many of which are systemic, unavoidable and cannot be diversified away. The foundational and historical assumptions we have built our business models on—dependable access to free and ample freshwater, predictable global weather patterns, the availability of a low-cost workforce, reliable site locations for agriculture or infrastructure—now represent emerging and complex uncertainties, leading to near constant business disruptions.

In the face of these disruptions, investors are changing course. Sustainability-directed assets now represent more than $40 trillion globally, having nearly doubled in the last four years and more than tripled over the last eight. Historically, the desire to maximize short-term shareholder profits has driven corporations to sacrifice long-term value. But this culture of short-termism—fueled by the influence of short-term investors, compensation systems linked to maximizing short-term profit, a preoccupation with quarterly earnings performance and the increasingly brief tenures of corporate executives—is being called into question.

Following the lead of socially responsible, impact and other long-term focused investors, the largest asset managers in the world—from State Street to BlackRock—are now bringing their significant influence and voting power to bear in support of an investment approach grounded in the understanding that sustainability is not only critical for risk management, but is core to value creation. In July 2020, BlackRock—with $7.4 trillion in investments—issued a report clarifying its position and approach to company engagement in order to drive sustainable business improvements. The firm has publicly committed to avoid investment in companies that "present a high sustainability-related risk," specifically naming climate change as a systemic financial risk and calling for better governance practices that help create long-term shareholder value. Pension funds, insurance companies, banks, asset managers and endowments are not only demanding that the companies they own and finance actively tackle these risks, they are also calling on management to demonstrate how they are strategically building for success in an uncertain future.

Investors are not the only ones waking up to this new business reality. Companies too are seeking to redefine business as usual and our traditional understanding of capitalism, unleashing new opportunities of inclusive growth in the process. In 2019, the Business Roundtable, made up of some of the most influential CEOs of the largest U.S. corporations, broke with long-held orthodoxy of maximizing shareholder profits at all costs to embrace the tenet that companies have a responsibility to create value not only for shareholders, but also for their broader stakeholder base, including their employees, customers, suppliers and communities. This statement, which now must be followed with clear action, underscores the argument that capitalism today should benefit society at large, as well as shareholders.

Companies and investors are making these bold commitments not solely out of a sense of moral responsibility, but because it's simply good business. For decades, forward-thinking companies and investors recognized the benefits of considering environmental and social impacts in risk management. Today, those same market leaders are proactively making moves to not only mitigate risk, but to realize the competitive advantage that only a sustainable business strategy can deliver.

Business Resilience
Doing business sustainably helps companies future-proof their operations against risks, ranging from climate change to material sourcing disruptions to brand reputation. Companies that integrate sustainability factors into their business decisions have a more comprehensive view of risk and are better prepared to avoid and withstand negative impacts—and, as a result, are outperforming their peers. A 2020 Financial Times study found that nearly six out of ten sustainable funds outperformed their conventional equivalent over the last ten years. The idea that sustainable business practice comes with a financial performance penalty has been disproven.

Market Opportunity
As companies navigate sustainability challenges, massive market opportunities are created to capitalize on the demand for a more sustainable economy. According to Standard Charter, there is a $10 trillion investment opportunity in addressing just three Sustainable Development Goals related to water and sanitation (SDG 6), clean energy (SDG 7) and infrastructure (SDG 9). And Accenture estimates a $4.5 trillion investment opportunity in transitioning to a circular economy where materials constantly flow in a 'closed loop' system rather than being used once and then discarded.

Employee Satisfaction
Sustainability is increasingly playing a role in determining where employees want to work. A strong sustainability culture helps businesses attract and retain the best and the brightest employees, motivate its workforce and drive productivity. Generation Z and Millennial employees will make up roughly 55% of the U.S. workforce in 2025—and, according to Boston Consulting Group, more than two-thirds of Millennials expect their employers to have a purpose-driven mission and their individual jobs to have a positive societal impact. This sense of purpose and the desire to leave a legacy is making its way to corporate executives. The 2019 UNGC-Accenture CEO Study found 94% of executives feel a personal responsibility for laying out their company's core purpose and role in society.

Consumer Acquisition and Retention
Consumers are looking for brands to lead with purpose and are rewarding those that do. According to the Edelman Trust Barometer, 73% of consumers believe that a company can take actions that both increase profits and improve conditions in communities where it operates, and 86% say they're likely to purchase from purpose-driven companies. And it's not just all talk: research by NYU Stern's Center for Sustainable Business found 55% of growth in the consumer-packaged goods industry from 2015 to 2019 came from sustainably-marketed products.

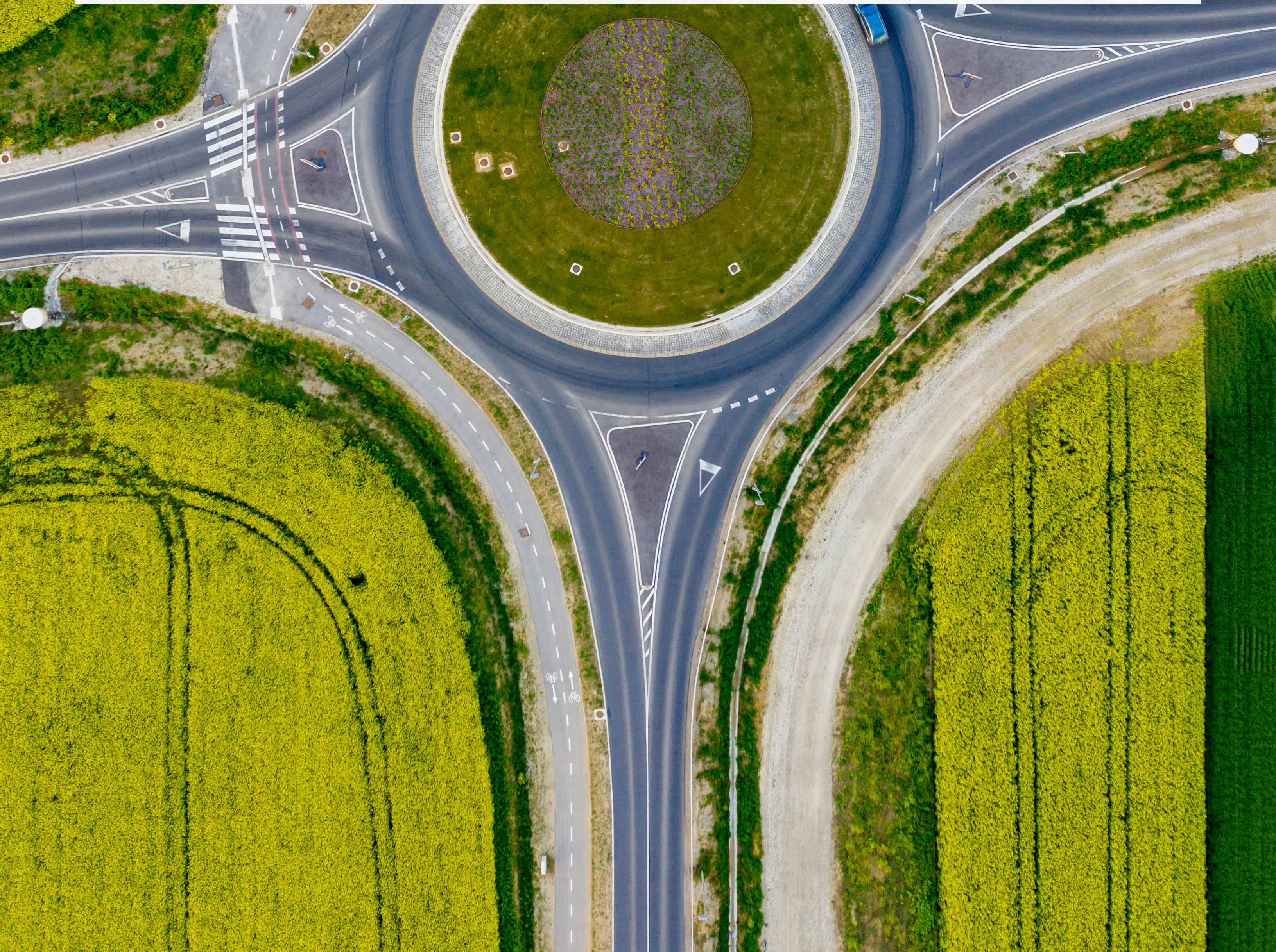
Investor Values
Millennial and Generation Z investors increasingly expect their investments to match their sustainability preferences and personal brands. A Morgan Stanley survey found that Millennials are twice as likely as the average investor to invest in companies targeting social or environmental goals. This shift in investor preferences, combined with the wealth transfer to Millennial and Generation Z investors, is creating a more values driven investor class. Bank of America Merrill Lynch forecasts that within the next two to three decades, Millennials could invest as much as $20 trillion into U.S.-domiciled sustainability directed investments, or roughly double the size of the U.S. equity market.

Companies should no longer be asking themselves 'why' bold action is critically necessary; that much is clear. The business case for sustainability has never been stronger. The imperative to act has never been more urgent. Companies must now be asking:

What is our role in achieving a more equitable, just and sustainable economy?

What actions do we need to take today, in five years, in 10 years to help get us there?

And what does SUSTAINABLE BUSINESS LEADERSHIP look like in the decade to come?



Ceres ROADMAP 2030

The **Ceres Roadmap 2030** is a 10-year action plan that challenges companies to become sustainable business leaders, advancing the transition to a more equitable, just and sustainable economy. It provides clarity and direction in the development of credible, effective and appropriately ambitious sustainable business strategies and priorities.

To achieve this vision, the Ceres Roadmap 2030 lays out the three components of corporate action that are essential for stabilizing the climate, protecting water and natural resources and building a just and inclusive economy. The **Critical Impact Actions** call on companies to minimize negative environmental and social externalities and maximize positive impacts across the value chain. The **Business Integration Actions** guide companies as they transition core business and internal corporate systems to support long-term success and value creation in a more sustainable economy. And finally, the **Systems Change Actions** challenge companies to drive the systems-level transformation needed to support and enable sustainable business practice.

Critical Impact Actions

The Critical Impact Actions—**Stabilize the Climate**, **Protect Water and Natural Resources** and **Build a Just and Inclusive Economy**—identify the private sector impacts that are most material across economic sectors and have the greatest potential to disrupt our planet, communities and economy. To help companies transition from commitment to impact at scale, the actions detail specific performance milestones for today, 2025 and finally, 2030.

Business Integration Actions

The Ceres Roadmap 2030 not only challenges companies to take more ambitious action across shared material impacts, it also concretely maps out the steps companies should take to re-engineer corporate systems and business models for a more sustainable future, providing a clear pathway for improving **Business Accountability**, **Strategic Planning and Execution** and **Transparency and Disclosure**.

Systems Change Actions

Importantly, the Ceres Roadmap 2030 recognizes that no one company alone can create a more equitable, just and sustainable economy. It calls for companies to proactively communicate, advocate and collaborate within and across industries and sectors, in order to positively influence customers, suppliers, industry groups and policymakers to create the Systems Change needed to support and enable sustainable business practices.

When addressed collectively, the Ceres Roadmap 2030 provides companies with the guidance they need to improve performance in the short term and transform their business for long term success.

CRITICAL IMPACT ACTIONS

STABILIZE THE CLIMATE

At the start of 2020, the World Economic Forum identified climate change as the most significant risk the world faces during the next 10 years. In the months that followed, the climate crisis worsened. While greenhouse gas (GHG) emissions fell to their lowest rates in a decade during the pandemic, rates quickly rebounded as carbon dioxide levels in the atmosphere rose, hitting an all-time record high. In the first six months of 2020, deforestation rose by 25% in the Amazon, compared to the same time period the year before. And the second half of 2020 witnessed triple-digit temperatures in the Arctic Circle leading to another record-breaking month of warming. Throughout the year, wildfires in Australia and the west coast of the U.S. burned at rates among the most destructive ever seen. The events of 2020 put into sharp relief the human consequences of the climate crisis—drought, air pollution, property and biodiversity loss, forced migration and poverty, among others. And they underscore the reality that the worst of these catastrophes disproportionately affect the historically disadvantaged and most vulnerable populations within our global communities.

46% of companies are pursuing quantitative, time-bound targets to reduce their GHG emissions, compared with 36% in 2018.

As the climate crisis intensified, the investor and corporate response strengthened. Two months into the COVID-19 pandemic, 330 companies and investors joined Ceres in the largest business-led advocacy day for climate action in U.S. history—advocating for a pandemic recovery that is both climate smart and just. The investor-led Climate Action 100+ initiative also grew, adding the heft of the world's largest asset manager, BlackRock, and delivering on the group's commitment to engage the highest emitting companies accounting for up to 80% of global industrial emissions. And other major investors and pension funds—including asset owners and money managers as diverse as the California Public Employees Retirement System, Illinois State Treasurer and State Street Global Advisors—continued to press the companies they own to recognize climate change as a systemic and financial risk.

While a handful of corporate leaders launched into 2020 with new commitments of achieving net-zero emissions, Ceres and Vigeo Eiris research found that just 2% of the 600 largest companies in the U.S. have set targets that are in step with the latest science and on a path to keep warming to no more than 1.5 ºC. A much higher percentage of the largest companies in the U.S. (46%) have quantitative targets for reducing GHG emissions, a noteworthy improvement from just 36% in 2018, but one that falls short of what is required to avoid the worst impacts of the climate crisis. The Intergovernmental Panel on Climate Change (IPCC) calls for the global economy to reach net-zero emissions by 2050—but the IPCC also states that if the world reaches net-zero emissions a decade sooner, by 2040, the chance of limiting warming to 1.5 ºC is considerably higher. This will require companies to set and meet short and medium term goals to reduce absolute GHG emissions by at least 50% by 2030 through business transformations that avoid absolute emissions and adopt efficiency solutions that bring down emission intensity. In parallel, companies must set and meet longer-term goals to achieve net-zero emissions through strategies that decarbonize and remove carbon throughout the value chain.

Shifts in industries to decarbonize are already underway. The price for renewable energy has been falling significantly and that trend looks to continue. In the U.S., the National Renewable Energy Laboratory predicts that wind and solar prices could fall as much as 64% and 74% respectively by 2050. Additionally, global EV fleet size continues to grow. Bloomberg New Energy Finance reports that the global EV fleet is expected to jump from 8.5 million vehicles to 116 million in 2030. And with increased investment, research shows that natural climate solutions could provide up to a third of the emissions removal needed by 2030. Change is possible and it is already happening.

As companies look to the future, the Ceres Roadmap 2030 provides guidance on the actions they can take to make and meet more aggressive commitments to reduce GHG emissions, remove carbon across the value chain, individually and collectively optimize energy usage, transition to renewable energy, transform transportation to a future of clean mobility and restore and protect lands in order to keep carbon in the ground and preserve vital ecosystems and the services they provide.

CERES ROADMAP 2030 VISION

By 2030, companies will transform how they power the economy, move people and goods across the globe, source materials and design products and services. Through these actions, companies will reduce absolute GHG emissions across their value chains by at least 50% in order to limit warming to 1.5 ºC, or less, over pre-industrial levels. In order to limit warming to 1.5 ºC companies will also remove carbon, within and outside their value chains, on a trajectory to net-zero emissions by 2040. Recognizing the human impacts of the climate crisis, companies will prioritize strategies, solutions and public policies that support a just and equitable transition to a net-zero emissions economy. To meet this vision, by 2030 companies will take the following actions:

GHG Emissions Reductions and Carbon Removal

Set and meet greenhouse gas emissions reduction targets to achieve at least a 50% absolute reduction throughout the value chain by 2030 and carbon removal targets that place the company on a trajectory to net-zero emissions by 2040, implementing solutions that ensure a just and equitable transition to a net-zero emissions economy.

Clean Mobility

All forms of transportation across the value chain transition to low- and zero-emission vehicles, fuels and modes, and companies provide employees equitable access to zero-emissions transportation options, as well as remote work arrangements.

Renewable Energy and Energy Optimization

Run global operations on 100% renewable electricity, increase energy efficiency by at least 30% and transition all buildings to net-zero emissions.

Land Restoration and No Deforestation

Eliminate deforestation across the value chain and protect and restore land to keep carbon in the ground in order to preserve vital ecosystems and the services they provide.

PROTECT WATER AND NATURAL RESOURCES

Unrestrained and rising global consumption and disposal of natural resources are endangering and eliminating species and destroying invaluable ecosystems at unprecedented rates. In 2020, The Global Footprint Network estimates that humans use 60% more biological resources than can be replenished in a year, even after factoring in lower resource use due to the pandemic. Meanwhile, the World Bank estimates that just 14% of waste is recycled, and up to 40% of waste is dumped or openly burned, and, at current rates, annual global waste production will increase 70% by 2050.

With the world population projected to hit 8.5 billion by 2030 and the middle class to expand by more than 32% to approximately 5.3 billion people, demand for resources will soon rise to levels never before seen. Exacerbated by the physical impacts of a warming planet—for example, leading to devastating flooding in some regions and debilitating drought in others—the most vulnerable regions and populations of the world will be further susceptible to the scramble for valuable and increasingly scarce resources. Corporations, investors, governments and civil society must work together to identify solutions that decouple growth and prosperity from resource consumption. Our planet is at the brink of collapse. Bringing our resource use back within planetary boundaries, engendering a culture of circularity and developing systems for resource regeneration will be imperative for sustaining the ecosystems upon which we depend.

42% of companies in water intensive sectors are pursuing quantitative, time-bound targets to reduce water-related impacts, compared with 36% in 2018.

The global economy's dependence on natural resources cannot be overstated. And the resource we depend upon the most? Fresh water. Based on current trends, the world's population will only have 44% of the water it needs in 2030. Companies are increasingly setting goals to manage water, yet corporate water consumption continues to mount. In a Ceres and Vigeo Eiris review of the largest U.S. companies where water is considered a material issue, just 42% have set quantitative, time-bound water consumption and discharge goals. Sufficient water management will require companies to work with a diversity of stakeholders, including those representing the individuals or communities impacted within specific watersheds, to set robust targets and protect the human right to water and sanitation.

The threat of 'Day Zero' in Capetown, South Africa in 2018 was a wake-up call. Not long ago, financial risks related to droughts, flooding and water quality were considered "emerging issues." This has changed. Growing financial risks associated with increasing water competition, weak regulations, population growth, aging infrastructure, water contamination and climate change impacts are quickly grabbing the attention of investors. Since 2016, the Ceres Investor Water Hub—a working group of investors seeking to drive greater consideration of water in investment decision-making—has more than tripled its membership to 130 global investors with more than $20 trillion in assets under management.

Similar to where the issue of water was five years ago, quantifying the risks related to biodiversity and ecosystem service loss is still in nascent stages. The Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) recently reported that around 1 million animal and plant species are threatened with extinction, many within decades. In the next decade it will be critical to shift capital away from practices that perpetuate these risks and towards sustainable solutions, identifying business models that dismantle the "take, make, waste" approach to natural resource use and address the challenges of end-of-life, "access over ownership", product "take backs" and resource regeneration.

The Ceres Roadmap 2030 provides guidance and actions to help companies protect natural resources with a commitment towards resource positivity, sustainable water balance and the elimination of discharges tied to negative impacts.

CERES ROADMAP 2030 VISION

By 2030, companies will decouple business growth from the destruction of natural ecosystems and commit to becoming resource positive, giving back more than they take from the planet, in a way that strengthens ecosystems and prioritizes resource access for vulnerable communities. Companies will design waste and pollution out of their businesses, keep products and materials in use and protect and restore natural ecosystems and biodiversity. In particular, companies will recognize fresh water as the world's most precious natural resource, essential to whole industries and all communities and ecosystems. By sustainably managing water use, eliminating pollution, taking collective action and supporting the human right to water, companies will achieve a water balance in high stress regions, on the trajectory to net positive water impact. To meet this vision by 2030, companies will take the following actions:

Natural Resource Protection and Restoration
Protect and contribute to the restoration of natural ecosystems and biodiversity by achieving resource positivity for key raw materials, sharply reducing demand for renewable and non-renewable resources and bringing circular economy business solutions to scale throughout the value chain.

Water Supply
For direct and supplier operations, reduce water use in the context of local water supply challenges and achieve water balance in watersheds of high water stress.

Water Quality
Eliminate water pollution across all areas of the value chain to ensure the health of aquatic ecosystems and the communities that depend on them.

BUILD A JUST AND INCLUSIVE ECONOMY

The 2020 pandemic brought into clear focus the inequalities and inequities that the global labor force lives daily, as well as the gaping holes in our social safety nets. Forward-thinking corporate leaders will view the pandemic as a wakeup call that more business disruption is coming—in the form of the climate crisis, water scarcity, inequity, automation and artificial intelligence. This moment also requires that we look backward and recognize the reality that people of color and indigenous communities—and even more so, the women within these communities—around the globe too often have borne the brunt of human rights violations, industrial pollution and resource scarcity.

Much of this history remains embedded in our current understanding of 'business as usual,' as demonstrated by the mounting movement calling for the end of systemic racism in the U.S., women crying out "#MeToo" all over the world and the upwards of 45 million people trapped in modern-day slavery. These injustices undermine not only the health and well-being of the impacted individuals and communities, but also represent significant risks to corporate brand, reputation, regulatory compliance, talent attraction and retention, business continuity and the license to operate.

Every business decision, whether opening a facility, launching a product, hiring a manager or even the siting of a solar farm, affects people inside and outside an organization. A commitment to be just and inclusive first begins with a commitment to respect human rights of people throughout the value chain. But it doesn't end there. To remain resilient and competitive in the decade ahead, companies must not only commit to respect human rights, they must also take a hard look at the human impacts of business decision-making across all levels of the organization and find ways to positively influence the institutions that allow inequity to persist. Before us is an opportunity to rethink the role of the corporation and its responsibility to protect our communities and the very people who drive the economy.

60% of companies have Human rights policies, compared with 49% in 2018

Ceres and Vigeo Eiris research found 60% of the largest companies in the U.S. have formalized commitments to respect the human rights of employees in direct operations and across the value chain, but only 4% of companies are using a lens of saliency (e.g. examining the risks to people vs. those to just the business) to determine material risks and priorities for the business. The shift toward a people-centric approach that considers the rights of and impacts on all stakeholders as part of the decision-making process will help companies gain a more complete understanding of current and future risk and support the transition toward business models that value people, ecosystems and the economy equally.

An examination of the impacts business operations and decision-making can have on employees, contractors, supply chain workers, consumers and the communities they all live in makes clear the power corporations have to either perpetuate or remediate institutional inequities. Companies need to move beyond statements of solidarity and take on the hard work of addressing the root causes, finding the courage to admit when they are part of the problem and looking beyond their four walls to influence the institutions that have the ability to unlock real systems change.

Realizing a just and inclusive economy will require those who sit on the board of directors and hold executive positions to reflect the diversity of the people and communities they rely on and which they serve. A 2020 study from Stanford University on Fortune 100 senior executives found that only 25% of executive positions are held by women, and only seven companies have a female CEO. Just 16% of executive positions are held by non-white executives, and only sixteen companies have a non-white CEO. An examination of board directors among the Fortune 100 reveals similar results, with women comprising just 25% of director seats and only 19% of seats are held by non-white directors. Advancing women and black, indigenous and people of color leaders into positions of management and corporate boards will not only build a more just and inclusive economy, evidence shows that improved diversity creates better companies. A study by Boston Consulting Group found that companies that have more diverse management teams have 19% higher revenue than that of companies with below-average leadership diversity.

The Ceres Roadmap 2030 provides guidance and actions to help companies to embed justice and inclusivity as part of their sustainable business strategy. It guides companies to identify business priorities through a lens of saliency, strengthen their business by realizing a commitment to equity, diversity and inclusion, achieve equality and equity across wages and benefits and better prepare for the future by supporting a just and inclusive transition for their workforce and the communities they are a part of.

CERES ROADMAP 2030 VISION

By 2030, companies will demonstrate through policies, goals and management systems an understanding of how these can contribute to a more just and equitable society. They will start with a respect for the fundamental human rights of their direct and indirect workforce and those people impacted directly and indirectly by corporate activities—and they will become strong advocates for changing the institutions and policies that perpetuate inequities. Companies will recognize the value of an equitable, diverse and inclusive workplace and provide all employees with equitable treatment, opportunity, wages and benefits—particularly, the need to empower and invest in women and other historically disadvantaged and underrepresented groups throughout its value chain. Corporate workforces at all levels, including the board and senior leadership, will reflect the intersectional diversity (gender, race, sexual orientation, disability, etc.) of the company's stakeholders. In an economy increasingly marked by rapid transformation, companies will actively consider the human impact of business model disruption and will work to support a just and inclusive transition for all impacted employees, consumers and communities. To meet this vision, by 2030 companies will take the following actions:

Human Rights

Respect human rights and proactively avoid causing or contributing to adverse human rights impacts through a company's own business activities or business relationships. Use a lens of saliency to inventory the intersection between company operations and sustainable business priorities to identify opportunities that advance social progress for women, people of color, and other historically disadvantaged and underrepresented groups.

Equity, Diversity and Inclusion

Build a workforce that, at all levels, reflects the intersectional diversity of the community, achieving gender parity by 2030. Foster a culture of anti-discrimination and create an inclusive workplace that empowers and invests in the advancement of women, people of color and other historically disadvantaged and underrepresented groups.

Wage and Benefits Equity

Provide all direct employees and contractors equal pay and benefits for comparable work, paying at minimum a living wage, and create equitable access to comprehensive benefits for all.

A Just and Inclusive Transition

Enable a just and inclusive transition toward an economic future that supports the well-being of workers and their communities. Companies avoid adverse impacts to people that occur as a result of internally and externally driven business model disruption (e.g. clean energy transition, automation/AI, resource scarcity, etc.) and embrace sustainable business models that engender greater social equity.

BUSINESS INTEGRATION ACTIONS

STRATEGIC PLANNING AND EXECUTION

The business imperative to act on environmental, social and governance (ESG) factors means that businesses have to progress past considering sustainability priorities as siloed activities. Success in the present and future economy requires not just a sustainability strategy, but a sustainable business strategy.

Integrating sustainability into strategic planning and execution will enable companies to challenge their own short-term thinking and reexamine their business models. By effectively weighing the trade-offs of sustainable business priorities, forecasting the costs and benefits of future decision-making and including key stakeholder perspectives in the planning process, companies will be more resilient to future business disruptions and better positioned to proactively act on opportunities rather than primarily reacting to risks.

A corporate purpose driven entirely by the desire to maximize profits, only meets the needs of a few. When a company can define its purpose beyond that of short-term financial returns, and align its unique set of capabilities with a greater sense of prosperity, it is able to more effectively inspire employees, build customer loyalty, strengthen communities and spur innovation.

The challenges before us will require innovation to mitigate business risk. But, more importantly, embracing a corporate culture of innovation will open new opportunities to create value for stakeholders. Research out of Harvard indicates that by adopting sustainability measures competitors cannot easily match, companies can create a strategic advantage.

The Ceres Roadmap 2030 challenges companies to create comprehensive and effective sustainable business strategies that include a clear corporate purpose and business case defined by material and salient sustainability impacts, guided by longer-term scenario planning and informed by a diversity of stakeholder perspectives.

CERES ROADMAP 2030 VISION

Companies will recognize that sustained value creation and the license to operate depend on business models and corporate strategies that link financial performance to the sustained health and well-being of the planet and all of its communities. Companies will integrate material and salient sustainability risks and opportunities, including relevant stakeholder perspectives and concerns, into business planning and execution to achieve sustainable business goals and drive innovation across business models. To meet this vision, by 2030 companies will take the following actions:

Corporate Purpose and Business Case
Articulate a purpose that demonstrates shared value for all key stakeholders and aligns financial interest, business strengths and the company's role in sustaining and improving the well-being of the planet and society.

Materiality and Saliency
Expand the definition of financially material risk to include material and salient sustainability impacts, and prioritize these risks, and also the related opportunities in the setting of business priorities.

Strategic Planning and Scenario Analysis
Integrate material and salient sustainability risks and opportunities into strategic planning, enterprise risk management, capital expenditure and investment calculations, and conduct sustainability-related scenario analysis to better analyze environmental and social impacts throughout the value chain and across multiple time horizons.

Stakeholder Voice
Regularly invite and equally consider a diversity of stakeholder voices in the development of strategic business priorities and decision-making, prioritizing transparent and ongoing engagement of those most impacted by the decisions being made.

BUSINESS ACCOUNTABILITY

In the face of a crisis, strong governance, accountability and management can be the difference between success and failure. For decades, forward-looking investors have viewed formal accountability for sustainability performance as a proxy for good governance overall and a signal of greater corporate resilience. In the early months of 2020, this theory played itself out in real time. Research from S&P Global Market Intelligence examined 17 ESG-focused exchange-traded and mutual funds, each with more than $250 million in assets under management, through the first five months of 2020. They found that all but three outperformed the S&P 500, concluding, "ESG funds remain relative safe havens in coronavirus downturn."

Corporate boards play a critical role in holding management accountable for integrating sustainability into a company's operations and strategic planning. Ceres and Vigeo Eiris research found that nearly half of the 600 largest companies in the U.S. (43%) have extended board oversight to formally include sustainability, up from just 32% in 2018. However, integration of sustainability oversight into a board committee charter is only a starting point. Sustainability-competent boards integrate material and salient sustainability issues into broader board conversations, functions and decision-making. In order to ask the right questions and drive more effective and informed decision-making, sustainability-competent boards require the entire board—not a single individual or committee—to be fluent on relevant issues.

43% of companies are formally overseeing sustainability risks and opportunities through their board of directors compared with 32% in 2018.

Compensation is one of the most powerful levers a corporate board can use to encourage management to act on sustainability. Linking compensation to sustainability performance metrics does not just inspire direct action, it can lead to broader company-wide commitments and, as a result, better sustainability performance. Why? When a company connects executive compensation with material, sustainable business goals, it sends the message that becoming a sustainable corporation is a business priority. A 2016 study by Deutsche Bank found that companies with ESG-linked executive compensation or board oversight financially outperformed other companies, both in the short and long term. Ceres and Vigeo Eiris research found that the percentage of companies leveraging this type of incentive is on the rise—increasing to 17% of companies, compared with just 8% in 2018.

True accountability, however, comes in the form of actions and results. Establishing a 'chain' of accountability across the entire workforce coupled with a commitment to appropriately resource sustainable business priorities increases the likelihood that a company will achieve its objectives. It also strengthens a company's agility to pivot when challenges arise or opportunities present themselves.

The Ceres Roadmap 2030 challenges companies to establish accountability through all levels of the organization; from the board to senior management and throughout the workforce.

CERES ROADMAP 2030 VISION

Companies will recognize that the integration of sustainability risks and opportunities into governance systems enables opportunity for improved performance, risk mitigation, cost reduction, increased revenue and competitive differentiation. Companies will drive business value by systematically integrating sustainability into corporate governance and decision-making from the board room to senior management to employees at all levels of the workforce. To meet this vision, by 2030 companies will take the following actions:

Board Oversight
Formalize corporate board oversight of sustainability risks and opportunities, and integrate these issues into board decisions on strategy, risk and revenue.

Senior Management Accountability
Senior leadership, including the full C-suite, maintains formal and coordinated oversight of material and salient sustainable business priorities and is held accountable by the board via compensation packages tied to sustainability goals.

Workforce Accountability
Appropriately resource, train and incentivize the workforce to embed sustainability across specific job functions.

TRANSPARENCY AND DISCLOSURE

Companies are in an era where complete transparency is in high demand. Investors, employees, customers, policymakers, advocacy organizations and communities are all looking to know more about how a company operates, how it defines its purpose and how it delivers on its responsibilities to stakeholders. In response, companies are struggling to determine what information they should provide to which audience and in what form.

Ceres report, Disclose What Matters, shows that companies generally fall into one of three phases in the maturity of their sustainability disclosure systems. In Phase 1, companies adopt commonly accepted disclosure frameworks in response to market demands for comparability. Ceres' research finds that, as of 2018, most large global companies are in this phase, with 70% of major global corporations using the Global Reporting Initiative (GRI) standards in their disclosure. In Phase 2, companies show how they are integrating sustainability into strategies and bottom-line business performance. This integration is shown through key systems, such as board oversight of sustainability, materiality assessments and stakeholder engagement. While many global companies have these systems in place, the quality of disclosures and connections back to company strategies are still mediocre. In Phase 3, companies show that their sustainability disclosures are as reliable as financial disclosures through external, third-party verification—most companies forgo this assurance, representing an increasing risk as financial regulators come under increasing pressure to make the reporting of material sustainability impacts mandatory.

The question today is no longer whether companies should provide sustainability disclosure, but what constitutes good disclosure and how companies can be incentivized to provide it. The days when the 150-page sustainability report satisfied the needs of all are behind us. But what lies ahead—a mix of disclosure guidance, frameworks and competing stakeholder needs—can often feel messy and confusing. Rather than starting from the position of a single framework, the Ceres Roadmap 2030 instead guides companies to consider what makes sustainability disclosures credible and effective in reaching key stakeholders.

The Ceres Roadmap 2030 challenges companies to create and maintain disclosures that are goal- and metric-driven, consistent, comparable, decision-useful, accessible and stakeholder relevant.

CERES ROADMAP 2030 VISION

Companies will recognize the value of sustainability disclosure and its ability to stimulate ingenuity and strategic thinking, improve sustainability performance, increase competitiveness in a resource-constrained economy and create value for shareholders. Companies will deliver both quantitative and qualitative information in ways that are consistent, decision-useful and comparable, ensuring disclosures are accessible and relevant to shareholders and other stakeholders. Companies will embrace transparency and public disclosure to enable all stakeholders to understand and evaluate their sustainable business strategies, priorities and approaches to both risk management and competitive differentiation. To meet this vision, companies will take the following actions:

Consistent and Integrated
Consistently position sustainable business priorities as critical drivers of corporate strategy and decision-making across all corporate communications, including in both voluntary and financial reporting.

Decision-useful
Disclose decision-useful information that includes both quantitative data and qualitative context.

Comparable and Verified
Use globally accepted disclosure standards and frameworks and seek external assurance to create comparable and verified disclosures.

Stakeholder Relevant
Ensure sustainable business strategies, action plans and related performance data are easily accessible and relevant to key stakeholder groups.

SYSTEMS CHANGE ACTIONS

Watershed health and gender equity, the climate crisis and migrant labor, air quality and vulnerable community health. The interconnectedness of the sustainability threats facing businesses and our communities adds a complexity that requires companies to not only make individual commitments, but to deeply examine the systems-level change required to address the root cause of these massive issues.

Companies are increasingly putting aside the often used mantra of "it's outside of our control," and finding ways to leverage their influence to advocate, engage and collaborate to seek systemic change. Within the Ceres Roadmap 2030, included under every action to Stabilize the Climate, Protect Water and Natural Resources and Build a Just and Inclusive Economy, is a call for companies to look outside their organizations in an effort to change the rules of the game, reimagine the status quo and find new solutions through collaboration and partnership across a diversity of partners.

As a foundation for these issue-specific calls for systems change, the Ceres Roadmap 2030 recognizes the critical importance of three key strategies: public policy advocacy, investor engagement and multi-stakeholder collaboration.

Public Policy Advocacy
In recent years, individual corporate commitments to reduce GHG emissions have increased and so too has a willingness of companies to use their voice more forcefully to call for science-based climate policy. As evidence, in May 2020 in the midst of the pandemic, Ceres brought 330 companies together in the largest business-led climate advocacy event in U.S. history. These corporate leaders called for government leaders to consider not only the clean energy transition, but equity in their plans to reopen the economy and get the U.S. back to work. These actions to advocate for policy action are critical in creating regulatory and market certainty. However, too often corporate sustainability commitments and actions can be undermined when contradictory lobbying practices, whether directly or through their trade associations, are not aligned to the same priorities. Such misalignment not only leads to inefficient corporate spending, but it can also create reputational and financial risk. Companies that establish robust governance systems to address material and salient sustainability impacts and have consistent lobbying efforts aligned with these risks will drive the adoption of a regulatory environment that best positions them for resilient growth.

Investor Engagement
Integrating sustainability factors into investment decision-making is fast becoming a mainstream practice among investors of all types and sizes. Today, sustainability directed investing represents about 45% of all professionally managed assets around the world. And wealth transfers to a new generation of Millennial investors will likely drive this trend to accelerate even further and faster. For many companies, engagement with investors on sustainability issues is fraught with trepidation and resistance. This leads to reactive, less

effective interactions with interested investors. In light of market trends, investor demands for more robust and decision-useful disclosure and the sheer number of companies making claims of "sustainability," companies that are leading the way have the opportunity to proactively demonstrate how material and salient sustainability issues are considered and weighed equally as business concerns and how sustainable innovation can drive new business opportunity.

Multi-stakeholder Collaboration

The concept of multi-stakeholder collaboration is not a new one. For decades, companies have increasingly recognized that they must look outside themselves to create partnerships in the community, with advocacy experts or within their own sector, to address issues of shared concern. Yet the sometimes unspoken rules that govern many of these collaborations—often guided by the desire to protect competitive advantage, preserve business or political relationships and maintain a united message—regularly fail to accomplish their stated objectives. The urgency and difficulty of the shared challenges before us require a new outlook on multi-stakeholder collaboration. What is now needed are collaborations that leave competition at the door, embrace creativity and innovation, refuse to bow to the lowest common denominator, call for public policy alignment and value a diversity of perspectives—including those most impacted by business decisions.

CERES ROADMAP 2030 VISION

Companies will recognize that no single company can build a more equitable, just and sustainable economy on its own. Companies will engage, advocate and collaborate in order to learn from and influence decision-makers, systems and policies that enable the achievement of sustainable business objectives. To ensure consistency, companies will align efforts in public policy advocacy, investor engagement and multi-stakeholder collaboration with their sustainable business priorities to stabilize the climate, protect water and natural resources and build a just and inclusive economy. To meet this vision, by 2030 companies will take the following actions:

Public Policy Advocacy

Advance regulatory certainty by advocating for public policies that align with the latest environmental science, internationally recognized standards for human and labor rights and opportunities to maximize community and worker well-being.

Investor Engagement

Proactively engage investors on sustainable business strategies and explain how they are linked to value creation and competitive differentiation.

Multi-stakeholder Collaboration

Build, engage and invest in multi-stakeholder collaborations that challenge traditional business practices to solve shared environmental and social challenges and enable systems-level change.

NAVIGATING THE ROADMAP

The road ahead is full of challenges. Achieving the actions necessary to realize a more equitable, just and sustainable future will not be easy, but it is possible and it is our collective responsibility to do everything we can to get there.

This is why the Ceres Roadmap 2030 is accompanied by a corresponding microsite designed to be an ongoing resource for companies and investors in the decade to come. Helping users to easily navigate and explore the action plan in greater depth, the guidance allows companies to see how the Ceres Roadmap 2030 can apply to their own business or investment portfolios. The Ceres Roadmap 2030 microsite features:

- Specific performance milestones for today, 2025 and 2030 across each of the actions
- Calls for collective action and examples where companies can have a role in systems change
- Practical guidance for companies that are just getting started
- Helpful tools and resources to support companies as they seek to integrate sustainability into business systems and drive performance improvements across material impact areas
- Real-world examples of companies already taking steps that are aligned with the Ceres Roadmap 2030 actions
- Frequently asked questions on how to best use the Ceres Roadmap 2030 action plan

Much will change over the next ten years as new scientific findings are released, legislation is changed and the business case for sustainability is further strengthened. For that reason, the Ceres Roadmap 2030 microsite will be updated regularly to reflect the current state of affairs and also supplemented with more targeted guidance, examples of corporate action and tools to ensure that companies have access to the most relevant and useful set of resources.

Explore the details of the Ceres Roadmap 2030
ceres.org/roadmap2030

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Definition of Terms

Environmental, Social and Governance (ESG) investing
An umbrella term for socially responsible investing, impact investing and mission-related investments. At their core, ESG investments consider environmental, social and governance factors alongside—and as critical influencers of—financial performance.

Fundamental human rights
As defined by the International Labour Organization's Declaration on Fundamental Principles and Rights at Work and the International Bill of Human Rights.

Historically disadvantaged and underrepresented groups
Certain demographic groups have historically and have yet to achieve equitable outcomes in their field of work. Here, "disadvantaged" refers to the adverse impact of current and historical social institutions on the ability of certain demographic groups to achieve economic and financial stability. "Underrepresented" refers to groups that have historically been denied access to certain types of work opportunities due to implicit bias or overt discrimination, and now account for a disproportionately small part of that labor pool relative to the local population. The location of a company's operations may determine or influence who would be considered a historically disadvantaged and underrepresented group.

Intersectional
The interconnected nature of social categorizations such as gender, race, sexual orientation, class and disability as they apply to a given individual or group, regarded as creating overlapping and interdependent systems of discrimination or disadvantage.

Just and inclusive transition
A range of interventions designed to ensure that the transition to a more sustainable economy does not exacerbate existing inequities but also promotes economic and social advancement into a new economy by demographic groups that have been historically excluded.

Key stakeholders
A person, group or organization that has interest in an organization. Stakeholders can affect or be affected by the organization's actions, objectives and policies. Key stakeholders are a subset of stakeholders that can reasonably influence an organization's outcome and goals.

Living wage
Minimum income necessary for a worker and their family to meet basic needs, including some discretionary income. In many cases, a living wage is considered to be higher than the minimum wage set by national laws.

Materiality
Applied to topics or information reasonably considered to be important to the subject at hand. Information can also be considered material if its omission would influence the decision-making process.

Net-zero
A balance or equilibrium between greenhouse gas (GHG) emissions produced (e.g., from factories, vehicles, heavy industry, power plants, etc) and those removed from the atmosphere (e.g., from reforestation, enhanced soil carbon management, etc.).

Renewable energy
Energy derived from natural resources that are infinitely replenishable and include electricity and heat generated from solar, wind, low-impact hydropower and geothermal resources.

Resource positive
Point where the result of a company's activity restores stock or health to a resource or ecosystem. Examples include the storing of carbon in soil, replenishment of clean water sources, etc.

Saliency
Applied to risks that introduce the most severe negative impacts on people through a company's activities or business relationships.

Shared value
Business strategy or activity that profitably benefits the environment and society so that value is shared amongst stakeholders.

Water balance
Defined as restoring a volume of water equivalent to what is consumed by the company in the watershed, through interventions in the watershed and communities that go beyond the four walls of the corporation.

Page 8 Image Citations

We consume resources equivalent to 1.6 planets per year
We will only have 44% of the water we need in 2030
Global annual waste production will rise 70% by 2050
Heat stress under a 1.5 ºC scenario, could cost $2.4 trillion by 2030
We will need 50% more food by 2050
Fossil fuels account for 80% of global primary energy use
1 million species are at risk of extinction
Men make 19% more in median salary than women
375 million workers may need to switch occupational categories, by 2030
25 million are trapped in modern slavery via forced labor
Oceans will have more plastic by weight than fish by 2050
Air pollution kills an estimated 7 million people per year
1/5 of the earth's land is affected by land degradation