

**W**ISHH

**World Initiative for Soy in Human Health**

*Enhancing human well-being through soy*

# **The World's Protein Needs and the WISHH Compass for 2011-2015**

WISHH Strategic Plan

Approved by WISHH Committee: July 26<sup>th</sup>, 2010

# The World's Protein Needs and the WISHH Compass for 2011-2015

As WISHH charts the course for its second decade of growth, three powerful forces influence the compass: More people. More demand for soy protein. More buying power in developing countries.

WISHH's new strategic plan sets sail into unprecedented opportunity. Global dynamics create unparalleled opportunities for WISHH's work on rising tides that can lift both U.S. soybean growers as well as people in diverse developing countries. As WISHH crafted this strategic plan, the International Monetary Fund released a report that for the first time developing countries are leading the world out of a recession. The rising middle classes of India, Indonesia, China and other Asian developing countries were leading the pack with their "resilient domestic demand."

## More People

The world's population will likely reach 9.2 billion in 2050, with virtually all new growth occurring in the developing world, according to United Nations. To feed these people, global food production must double by 2050. Meanwhile, the available land to feed people is scarce—2/3 of available land is located across only 13 developing countries.

## More Protein Demand

The potential appetite for protein is projected to increase by 75 percent by 2025 compared to 2001, according to the National Soybean Research Laboratory. Developing countries are the big drivers for this protein demand as their populations and income levels grow.

The food industry has read similar signs. Major food and restaurant companies are shifting more of their capital expenditures overseas to developing markets, according Fitch Ratings.

Soy protein has an important role in food industry growth that can combat malnutrition and fuel economic progress. A landmark 2008 Lancet medical journal series concluded more than one-third of child deaths are due to maternal and child undernutrition. Malnutrition is directly associated with a child's future economic productivity. The authors state, "In addition to health and nutrition interventions, economic and social policies addressing poverty, trade, and agriculture that have been associated with rapid improvements in nutritional status should be implemented."

## More Buying Power in Developing Countries

The number of people in developing countries with household incomes above \$16,000 per year is expected to reach a total of 2.1 billion by 2030, according to the World Bank. That's nearly six times the number of \$16,000-income households in 2000. As their incomes rise from about \$2 to \$10 per day, people eat more meat, dairy products, fruits, vegetables & edible oils, causing rapid demand growth.

**According to global experts, lifting low-income consumers out of poverty is the most important determinant of the future global demand for food. That's why WISHH is setting its course as described in the following pages of this strategic plan.**

In 2000, U.S. soybean farmers launched the World Initiative for Soy and Human Health (WISHH) to bring U.S. soy to the growing numbers of protein deficient populations in developing countries. The need is still there, but WISHH has achieved many of these initial goals and objectives to address this protein deficit. WISHH begins this new decade with a refreshed mission and focused strategic plan with the same dedication to supplying U.S. grown soybeans, soyfoods and ingredients, both in the short term through commercial markets and, over time, through contracts with partners focused on economic development, health and nutrition projects in developing countries. The following strategic plan is ambitious and will require adequate resources to accomplish the goals and objectives.

**VISION:** The health and well-being of the world population with protein deficiency in developing countries will improve through increased dietary consumption of high quality soy protein as well as through economic opportunities to incorporate U.S. soy protein into food manufacturing, livestock production, and/or aquaculture.

**MISSION:** Create commercially sustainable solutions and opportunities for U.S. soy protein by improving the health and nutrition of people in developing countries by addressing protein deficiencies.

**GOALS:** The World Initiative for Soy and Human Health for 2010 to 2014 will work to develop long term demand for U.S. soy protein. Focused on the goals and objectives of the strategic plan, WISHH should be able to achieve specific market penetration with a specific volume of sales within a specific time frame in targeted developing countries as well as improve the health and nutritional status of humans through long term consumption of foods produced with soy.

### **Goal # 1:**

By 2015, 15 companies in 5 developing countries will introduce, as first time users, or increase the current use of soy ingredients and soy products made from U.S. soy in the commercial food supply.

### **Goal # 2:**

By 2015, 5 Private Voluntary Organizations (PVOs) or governments will incorporate soy ingredients and soy products (focusing on Value Added Soy Products) into food distribution and economic development programs for protein deficient populations in targeted developing countries to improve their nutrition and health status.

### **Goal # 3:**

By 2012, WISHH will have improved the existing viable and effective infrastructure to support the programming and administration activities of the organization to ensure long lasting growth in world demand for soy protein and opportunities for U.S. soy in developing countries.

## Creating and Building Commercial Markets

**Goal # 1:** By 2015, 15 companies in 5 developing countries will introduce, as first time users, or increase the current use of soy ingredients and soy products made from U.S. soy in the commercial food supply.

**Objective 1.1:** By 2011, WISHH will update and refine established specific criteria<sup>1</sup> for selection of the target developing countries most likely to commercialize foods with soy and will use the criteria to prioritize, propose, plan and execute market development projects.

**Objective 1.2:** By 2011, WISHH will refine its system to collect, analyze and use essential data that identify specific and quantifiable commercial market successes and highlights challenges or barriers to commercial adoption of soy products, using existing data bases and supplementing with additional critical data to communicate with the funders of market development projects.

**Objective 1.3:** By 2011, WISHH will continue to employ the specific technical assistance in business development, marketing, promotion, and nutrition/health programming needed to achieve the requisite commercial applications that use soy in food products or the food supply in the targeted developing countries.

**Objective 1.4:** By 2011, WISHH will gain 75% awareness, among targeted countries, companies, and funders, of the benefits and successful applications of using soy in commercial food products, using effective communication channels and materials.

**Objective 1.5:** By 2011, WISHH will coordinate thoroughly activities with ASA International Marketing, United Soybean Board, and U.S. Soy Export Council to utilize regionally appropriate behavior change and business models and include project evaluations using Key Performance Indicators (KPIs).

**Objective 1.6:** By 2012, WISHH will secure \$5,000,000, or \$1 million a year from non-check off sources, to carry out market development in targeted developing countries over a five-year period and set aside a minimum of 20% for administrative expenses, where possible.

**Objective 1.7:** By 2015, WISHH will assess progress in 75% of the market development projects using realistic benchmarks, including the number and approximate volumes of products sold that use value added soy products, ingredients or soybeans in commercial enterprises, and the number of new businesses incorporating soy ingredients in targeted developing countries.

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<sup>1</sup> Criteria would include characteristics of developing countries that can ensure a commercial market within a specific time frame, reliability of the infrastructure, political stability, absence of obvious fraud, potential for business development, earning power, and dietary preferences.

## Increasing Soy Demand through Nutrition, Health and Economic Development

**Goal # 2:** By 2015, 5 Private Voluntary Organizations (PVOs) or governments will incorporate soy ingredients and soy products (focusing on Value Added Soy Products) into food distribution and economic development programs for protein deficient populations in targeted developing countries to improve their nutrition and health status.

**Objective 2.1:** By 2011, WISHH will update and revise specific criteria<sup>2</sup> for selection of developing countries and PVOs most likely to incorporate soy into dietary interventions, including ready to use therapeutic foods, complementary foods, school meals, public health programs, emergency rations or other forms of food distribution or institutional feeding.

**Objective 2.2:** By 2011, WISHH will, building on existing data bases, establish and use a system to collect, analyze, and use essential data to report to funders and partners the number of metric tons of soy products distributed per year by PVO's.

**Objective 2.3:** By 2011, WISHH will employ the specific technical assistance in economic development, outreach to PVOs and international food assistance organizations and nutrition and health interventions needed to achieve the anticipated use of soy in food aid packages and development programs in the targeted developing countries.

**Objective 2.4:** By 2011, WISHH will gain 75% awareness among targeted country representatives, PVOs, and funders of the health and nutrition benefits of soy in diets and the successful humanitarian projects using soy in developing countries.

**Objective 2.5:** By 2012 and beyond, WISHH will secure \$2 million per year, that includes a 20% set aside for administrative expenses, where possible, from USDA or USAID and private foundations, such as the World Soy Foundation, to carry out economic development and nutrition and health interventions using soy in targeted developing countries over a five-year period.

**Objective 2.6:** By 2013, WISHH will be recognized as the premier commodity organization for providing technical services to PVOs, development organizations and/or developing countries in the area of nutrition, health, food technology and agro-business development.

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<sup>2</sup> Criteria would also include countries that are very likely to move from humanitarian to commercialization within a specific period of time.

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**Objective 2.7:** By 2015, WISHH will have secured the removal of structural challenges to the use of value added soy products in food aid programs and increased purchases and facilitated the sale of 15,000 metric tons of value added soy products or soybeans as part of food aid packages distributed in targeted countries by targeted PVOs.

**Objective 2.8:** Each year, WISHH will reach at least 10 PVO's working in targeted countries that will incorporate soy into products feeding vulnerable individuals and will educate individuals about soy's nutrition and health benefits.

**Objective 2.9:** Each year, WISHH will pinpoint specific areas and partners to monitor and foster alliances that provide funding opportunities and overcome threats related to positioning soy products in food aid, nutrition and health projects for protein deficient populations in targeted developing countries.

- Part of this focus will be geographic and organizational
- Part of the efforts will be in targeted intervention areas such as:
  - Women's nutrition and economic development
  - Early childhood nutrition
  - School feeding
  - Micro, small to medium enterprise development
  - Public health promotion and disease prevention programs
  - Devastating disease mitigation through better nutrition
  - Livestock, aquaculture and feed industry development
  - Soybean value chain targeting subsistence farmers

## Strengthening the WISHH Infrastructure

**Goal # 3:** By 2012, WISHH will have improved the existing viable and effective infrastructure to support the programming and administration activities of the organization to ensure long lasting growth in world demand for soy protein and opportunities for U.S. soy in developing countries.

**Objective 3.1:** By 2012, WISHH will establish a dedicated, sustainable governance structure that permits strong representation of the soybean farmer and collaboration with the commercial stakeholders and differentiates the World Initiative for Soy and Human Health from the World Soy Foundation.

**Objective 3.2:** By 2012, WISHH will adopt and use continuously a systematic approach to allocation of funds, staff, and consultants that assures fulfillment of goals 1 and 2 and embraces the mission.

**Objective 3.3:** By 2013, WISHH will have secured long lasting commitment of resources for programs and administration that includes but is not limited to \$1 million per year from 23 farmer based groups and \$3 million per year from 5 commercial interests, private foundations, and/or public grants.

**Objective 3.4:** By the end of 2014 , WISHH will conduct a review of all major past projects to assess benefit to long term commercial market development as well as of WISHH internal staffing, data collection, and communication activities to ensure progress is being made implementing the Goals and Objectives in the 2010-2014 Strategic Plan.