

PRESS RELEASE

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Trillium Launches New White Paper on Investing in Sustainable Food and Agriculture across Asset Classes

May 23, 2017 // Boston, MA: A group of investors released a new white paper, *Impact Investing in Sustainable Food and Agriculture across Asset Classes: Financing Resilient Value Chains through Total Portfolio Activation*. The paper was prepared by [Croatan Institute](#) with the guidance and close collaboration of [Iroquois Valley Farms](#), [Maine Organic Farmers and Gardeners Association \(MOFGA\)](#), [Organic Agriculture Revitalization Strategy \(OARS\)](#), [Root Capital](#), [RSF Social Finance](#), and [Trillium Asset Management](#).

A December 2016 survey conducted by the Global Impact Investing Network found that impact investment assets allocated to the food and agriculture sector had a compound annual growth rate of 32.5 percent since 2013.^[1] Using the Total Portfolio Activation approach, the paper provides a framework to help investors expand the scope of investing in sustainable food systems across common portfolio asset classes such as cash, public equities, and fixed income, as well as alternative asset classes such as private equity, venture capital, and real assets. It is the first of its kind to structure a total portfolio approach thematically around sustainable food and agriculture.

"We know that we have a responsibility to align our investments with our values and to put those investments to work to build a more sustainable food system," said Matthew Patsky, CEO of **Trillium Asset Management**. "The paper serves as a guide for sustainable and responsible impact investors looking to leverage their investments and broaden their impact across agricultural value chains."

"Whether your focus is on redeveloping the resilience of local foods systems or fostering sustainable approaches to agriculture at a more global scale, impact investors have a critical role to play in financing links across the value chain," said Joshua Humphreys, President of **Croatan Institute**, Senior Strategist of **OARS**, and a co-author of the study. "As this research shows, impact investment opportunities in this rapidly evolving field now extend across asset classes, and Total Portfolio Activation provides a useful

^[1] Abhilash Mudaliar, Aliana Pineiro, and Rachel Bass, "Impact Investing Trends: Evidence of a Growing Industry," Global Impact Investing Network, December 2016.

framework for investors to understand those opportunities and re-allocate their portfolios to seize them."

"By providing mission-driven enterprises across food and agriculture with access to capital, we are able to improve the infrastructure of local food systems while generating greater positive social and environmental impact," said Kate Danaher, Senior Manager of Social Enterprise Lending and Integrated Capital at **RSF Social Finance**.

"This paper demonstrates how organizations such as Root Capital can help to address the market failures that have left agricultural businesses around the world chronically under-resourced," said Rachel Serotta, Director of Investor Relations at **Root Capital**. "When we provide these businesses with essential capital and financial management training, they become engines of impact in their communities: family incomes rise, food security improves, women get their share, ecosystems thrive, and young people have the opportunity to lead."

The paper can be downloaded by visiting www.trilliuminvest.com

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