



SUPPLY CHANGE IN EUROPEAN FOOD CHAINS

BUSINESS FORUM REPORT



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IMPRINT

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INTRODUCTION

THE CONSEQUENCES OF THE GLOBALIZATION OF FOOD SUPPLY CHAINS

Over the years the food industry has experienced an intensification of the interconnectedness of global food systems, giving rise to changes in production and consumption patterns, particularly in the context of supermarket store brands. In general terms, such food supply chains have brought about certain benefits, including quality and affordable food choices in Europe as well as diverse and innovative products, which at the same time directly impact the overall competitiveness of the market. However, the same development has also raised new challenges such as the need to establish equal relationships between actors in a very heterogeneous value chain, a lack of transparency in the chain which directly affects how prices are established, diminished responsibility for human rights, and other negative economic, social and environmental externalities (*European Commission, 2014*). Accordingly, there is a need to move towards more sustainable and fair food supply chains, a process which will require a comprehensive and multi-dimensional approach to achieve aligned and long lasting positive outcomes.

“*Supply chains are complex and globally interlinked. A true supply chain approach inclusive of the North-South perspective is needed when exploring them in depth. Studying and implementing further the co-operative model, better understanding consumer behaviour and working with non-traditional actors like advertising and marketing actors are also key to bring about the change.*”

ROSITA ZILLI – EURO COOP

A FAIR AND SUSTAINABLE FOOD SUPPLY CHAIN BRINGS BUSINESS BENEFITS

Long supply chains often lead to increased internal and external risks for companies resulting from their significantly decreased control. It is important for retailers to recognize this extended responsibility and focus on improving the overall sustainability performance throughout the whole supply chain. Needless to say, all retailers should acknowledge their corporate responsibility in respecting human rights¹, implementing strategies to mitigate negative impacts caused by them or other entities delivering operations on their behalf.

By introducing better management systems, conducting due diligence and requiring suppliers to abide by internationally recognized sustainability standards and reporting instruments, businesses move to fulfilling these expectations, improve their performance and advance the social development situation in countries where they operate. They minimize reputational risks and work flow disruptions as well as become better prepared to address consumers' demands resulting from their increasing level of awareness about detrimental production patterns and their consequences (*UN Global Compact and BSR, 2010*).

A number of resources are already available to support this, such as the OECD Guidelines for Multi-National Enterprises, the United Nations Guiding Principles, the UN Global Compact² and the Food and Agriculture Organization's (FAO) Guidance for Responsible Agricultural Supply Chains.

¹ As defined in international frameworks such as the International Bill of Human Rights or the ILO Declaration on Fundamental Principles and Rights at Work (*OECD, 2011*)

² For more information please visit the website www.unglobalcompact.org

Beyond reducing risk and meeting growing stakeholder expectations, delivering resource efficient products reduces businesses' sourcing costs whilst positively contributing to reducing their environmental and social footprints. Moreover, the focus on fair and sustainable supply chains is a driver for product innovation, by improving existing products or creating new market segments, and contributes to securing future supply (*UN Global Compact and BSR, 2010*).

HOW DO WE GET THERE?

Mapping and improving the performance of food supply chains and delivering better products to consumers requires a holistic approach. Companies need to know, understand and work with, not only their suppliers, but also all other relevant stakeholders including: governments, relevant local and international civil society organizations (CSOs), academic experts, and consumer representatives. Collaborating with these actors will give businesses multiple advantages of securing knowledge and expertise that they could be missing, identifying and dealing with issues in their early stages, sharing best practices and collectively tackling common issues, thereby avoiding overlapping and conflicting work. From a market perspective, improved communication throughout the supply chain increases a company's competitive advantage, allows it to differentiate its products, and ultimately benchmark and evaluate its performance with other companies operating in the market (*UN Global Compact and BSR, 2010; PWC, 2014*).

The SUPPLY CHA!NGE project, funded by the European Union, aims to analyse the sustainability performance of European supermarket store brands, raise awareness regarding current challenges and hotspots along the chain, and support dialogue and capacity building with retailers for a fair and sustainable supply chain.

CURRENT SITUATION OF THE RETAIL MARKET

When analysing supply chains and making recommendations for future action, as will be the case in this report and throughout the duration of the SUPPLY CHA!NGE project, it is important to acknowledge existing progress and retailer awareness of their position and responsibility in the value chain. Some retailers are taking action and have engaged in making improvements throughout their supply chains. The SUPPLY CHA!NGE project is especially focusing on store brand products where retailers have a larger influence on the production conditions of these products and more direct responsibility for the brand. Retailers are not only gatekeepers between suppliers and consumers, but they can also function as catalysts for sustainability in the chain, increasing demands and expectations on their suppliers.

At the same time retailers are aware of the increasing consumer power and the growing demand for more sustainable products. In this situation, a focus on sustainability is a point of differentiation from competitors. Many consumers say they want to buy more responsible products (fair, ecological) but don't know how to interpret different labels or simply do not trust them. Retailers are the key actors in filling the gap between consumer intention and confusion. Increased transparency about the origin and composition of products is an essential part in meeting consumer expectation, ideally linked with traceability and increasing consumer communication.

“*As food safety and quality issues increase, consumers and buyers are seeking to have greater assurance on the source of food products. GS1's global supply chain standards provide the means to deliver effective traceability across the entire value chain.*”

JIM BRACKEN – GS1

WHAT'S IN THIS REPORT?

This report is designed to give a comprehensive overview of the activities and outcomes of the SUPPLY CHA!NGE Business Forum, which took place in Milan in October 2015, as part of the SUPPLY CHA!NGE project. These activities, and this report, are intended as the starting point for project engagement and as an opportunity for exploring potentials for joint, constructive future actions for sustainable food supply chains. The inputs and workshop outcomes resulting from the forum's panellist presentations, further discussed in this report, already provide a rich source of collaborative solutions.

The next section provides an introduction to the objectives of the Business Forum and the overall SUPPLY CHA!NGE project. This is followed by a description of the workflow, and activities and topics covered at the forum including the expert speakers and panellists involved. This is followed by summaries of the workshop outputs, starting from the key issues, followed by the corresponding leverage points and resulting in elaboration of a future vision and potential collaboration and partnerships for achieving sustainable supply chains. A short conclusion and further recommendations for improving supply chains can be found at the end of this report. Additional presentations and materials are available at the SUPPLY CHA!NGE Business Forum webpage: www.supplychainge.org/the-business-forum



1 THE SUPPLY CHA!NGE BUSINESS FORUM

The Business Forum is an integral part of the three-year European Union funded SUPPLY CHA!NGE project focused on improving the sustainability of production and consumption patterns of supermarket store brands in the context of the European Year of Development (EYD) 2015³. The overarching goal is advancing the environmental, social and economic state of affairs in developing countries, where many products found on European shelves are produced. In order to achieve this, one of the project's focal areas is increasing consumer awareness regarding the interrelation between consumption and production patterns and sustainable development worldwide.

“ *We need a much broader understanding of consumer behavior and a deeper understanding of the complexity of interactions taking place in the food production-supply systems and of the roles and responsibilities of the diverse stakeholders engaged in food chains at all levels. Initiatives like the SUPPLY CHA!NGE project are a great contribution to this effort.* ”

LUIS FLORES – CONSUMERS INTERNATIONAL

Awareness raising activities are combined with research work and dialogues with businesses. One project activity will be the development of a transparency platform, which will contain information about the origin and sustainability of supermarket store brands, relevant to all target groups of this project. This will also support suppliers and retailers in making the link between product chains and their impact on the society, environment and economy and in exploring the option to use the latter as a strategic opportunity to improve their performance and differentiate their products from competitors in the market.

Understanding the nature and heterogeneous character of supply chains, the partners of the SUPPLY CHA!NGE project acknowledge the

importance of working, mobilizing and contemplating the interests of all related stakeholders including: European citizens, CSO multipliers, journalists, EU decision and policy makers, and certainly as key actors, the decision makers in the supermarket supply chains. The Business Forum is one of many participatory activities aimed at encouraging a shift towards sustainable practices along the value chain. The project will deliver other multi-stakeholder activities including capacity building, retail roundtables and scenario workshops to establish long-term effective practices.

Given this context, the Business Forum's primary aim was to initiate a collaborative dialogue amongst relevant stakeholders and to promote strategies for more sustainable supermarket store brands through knowledge and good practice sharing, the establishment of alliances and networks, and the identification of potential business solutions. It took place on the 23rd and 24th of October 2015, at the HOST exhibition in Milan, an official partner of the EXPO. The forum hosted around 80 participants from all over Europe and beyond, representing retailer, supplier, policy maker, civil society and consumer perspectives regarding the need for more sustainable and fair supermarket supply chains. The forum provided a progressive build-up of the topic. Panellists and speakers gave a comprehensive overview of stakeholder perspectives, which included inputs from Latin American and African representatives, as well as identified key challenges and opportunities for improving sustainability throughout the supply chain. Interactive workshops allowed participants to identify issues and leverage points, and ultimately, develop collaborative solutions. The outputs of these sessions were captured with additional graphic illustrations.

“ *Focus on what's relevant: Environmental Footprint shows improvement opportunities throughout the value chain.* ”

IMOLA BEDO – EUROPEAN COMMISSION DG ENVIRONMENT

³ For more information on the EYD please visit the website www.europa.eu/eyd2015

2 SUMMARY OF THE FORUM'S WORK FLOW

The Business Forum consisted of six sessions that were carried out over two days, each building on previous sessions to allow participants to reach a comprehensive and common understanding of the overall topic by the end. The first three sessions focused on providing an overview of the food chain's current state of affairs, and identifying problematic areas and hotspots where intervention is necessary. The focal point of the remaining sessions was on looking forward and outlining potential actions to be undertaken to improve the sustainability performance of food supply chains.



TL Martin Wildenberg, TR Simone Pedrazzini and James Mwai,
BL Louise Luttkhoilt and Victor Prada, BR Sandra Dusch Silva

Session 1: PERSPECTIVE ON SUSTAINABILITY IN EUROPEAN FOOD SUPPLY CHAINS

Set the context and the basis for further discussion into the topic of European food chains and their sustainability levels. Keynote speakers (see panel presentations in next section) provided expert knowledge from policy, consumer and supplier interests, and retail cooperatives, with an interactive panel discussion.

Session 2: HOW SUSTAINABLE AND FAIR ARE OUR SHOPPING BASKETS?

Presented an evaluation of the current state of supply chains and identified key hotspots and challenges. This session involved speakers from the SUPPLY CHA!NGE consortium: **Sandra Dusch Silva** (CIR) and **Martin Wildenberg** (Global 2000) provided insights about the current situation in the orange supply chain; **Sonia Vartiala** (Finnwatch), gave an overview about the situation in the tuna industry; and **Sanne van der Wal** (SOMO), presented an analysis of European supermarkets' policies towards supply chain. Participants contributed their opinions regarding the main perceived challenges through a poster tour (see Business Forum website).





Session 3:
LEVERAGE POINTS FOR A SUSTAINABLE FOOD CHAIN

Engaged participants in an interactive workshop to identify key areas to be intervened in throughout the farm to fork stages in a chain. Input presentations were provided by **James Mwai** (Fairtrade Africa), who gave a regional perspective regarding fair food chains, and **Simone Pedrazzini** (Quantis), who spoke about the importance of the EU Organisation Environmental Footprinting initiative in identifying leverage points.

Session 4:
PROMISING AND BEST PRACTICES FOR A FAIR AND SUSTAINABLE FOOD CHAIN

Outlined potential actions for improving (the sustainability of) supply chains. Keynote speakers (see panel presentations in next section) provided expert knowledge on fair trade, supplier and consumer initiatives. The panel discussion concentrated on existing and potential initiatives for fair and sustainable food chains.

“ *The Sustainable Development Goals (SDGs) and the United Nations’ 2030 Sustainable Development Agenda represent remarkable business opportunities since they will be shaping the agenda of development in both developed and developing countries in the next 15 years. I expect that retailers which will be embracing SDGs in their business strategies are more likely to perform better and increase their market competitive advantage than those who don’t.* ”

LARS FOGH MORTENSEN – EEA



Session 5:
FUTURE VISION FOR A FAIR AND SUSTAINABLE FOOD CHAIN

Focused on the road map to improvement. **Lars Fogh Mortensen** (European Environment Agency) complemented this session with a viewpoint on the importance of sustainable food value chains and business towards achieving the Sustainable Development Goals (SDGs). Building on the leverage points and existing initiatives identified, participants worked together to identify future visions of sustainably structured food chains and outline steps to be undertaken to implement them. Participants used the back-casting method from 2030 through to a timeline beginning in 2020.

Session 6:
COLLABORATIVE POTENTIAL FOR A SUSTAINABLE EUROPEAN FOOD CHAIN

The final workshop session centred on the potential of collaboration for a sustainable food chain, one of the pivotal aims of the Business Forum and SUPPLY CHA!NGE project. **Louise Luttikholt** (Helvetas Inter-cooperation) and **Victor Prada** (FAO) elaborated on the benefits of collaborative actions, and provided examples of actions that have been, or are currently being undertaken in global food supply chains. Bringing together the outputs of the previous sessions, participants worked together to identify multi-stakeholder initiatives for fairer and more sustainable food chains, as well as potential partnerships to drive those initiatives towards 2030.



3 EXPERT PANEL PRESENTATIONS

Day 1 – Panellists on the session: PERSPECTIVES ON SUSTAINABILITY IN EUROPEAN FOOD SUPPLY CHAINS



Imola Bedo

*Policy Officer, European Commission DG Environment
Brussels, Belgium*

Food and the EU product environmental footprint pilot phase

Companies often need to prove their environmental credentials in different ways on different markets; consumers are interested in green products but confused about which scheme to trust. The EU Environmental Footprint methods were born to create a level playing field for competition based on life cycle environmental performance and to provide reliable, comparable information on it. 2016 is the last year of the Environmental Footprint pilot phase. 26 pilots of more than 280 volunteering companies and other organizations are active. 11 pilots are dedicated to food, drink and related products. Based on the results of the pilot phase, the European Commission will propose policies for implementing the Environmental Footprint methods in the course of 2017–18. More info: www.ec.europa.eu/environment/eussd/smgp



Luis Flores Mimica

*Regional Campaign and Policy Officer, Consumers International
Santiago, Chile*

Consumers and supermarkets: What's the deal?

Empirically it has been concluded that consumers are not 'rational decision makers' and their behaviour does not always correspond to their good intentions. On one hand, consumption is very often for a wide range of products and services a deeply routinized, symbolic and cultural activity. On the other, activities, carried out by very many actors and networked in highly complex webs of interaction, lead to food chains' negative social and environmental side effects. Therefore, the meaning and function of food consumption – in general – and of concrete brands and products – in particular – in today's society have to be better assessed and understood in order to effectively tackle the related negative impacts of food systems.

Day 1



Marcel Gomes

*Executive Coordinator, Repórter Brasil
São Paulo, Brasil*

Grievances and challenges in the production of food, feed, fuel and fiber in Brazil – Selected examples

Brazil is one of the major agricultural players in the world. It is the largest exporter of soybean, sugar, poultry, coffee and orange juice, and the second largest exporter of beef. However, problems related to the sustainability of production have been found in all production chains. Almost 60% of rural workers have no permanent contracts and 54% receive less than the national minimum wage. Since 1995, 50,000 workers were freed by the authorities of the slave condition. Repórter Brasil, an NGO working towards the advancement of human and workers' rights, aims to make food supply chains more sustainable by addressing transparency, human rights and working conditions as well as engaging in multi-stakeholder initiatives.



Rosita Zilli

*Deputy Secretary-General, Euro Coop
Brussels, Belgium*

Sustainable food chain – What does it take? A consumer co-operative's standpoint

The consumer co-operative business model represented by Euro Coop can be considered intrinsically sustainable thanks to the cooperative values and principles it operates on. Socio-economic and environmental considerations are key components in Euro Coop's vision of sustainable food chains and co-operation as well as partnerships among all relevant actors necessary to implement this vision. This can be seen in the showcase of initiatives established by Euro Coop's members towards these aims, as is the case with Coop Italy – first in the world to launch the Environmental Product Declaration (EPD) certification for beef and veal.

Day 2 – Panellists on the session:
**PROMISING AND BEST PRACTICES FOR
A FAIR AND SUSTAINABLE FOOD CHAIN**



Andreas Kratz

*Director Standards and Pricing, Fairtrade International
Bonn, Germany*

The power of power – Full relations

Fairness in supply chains means more balance in opportunities, resources and power. Any change from the current status must mean: the weakest part takes most of the advantage. Investing in suppliers must mean long-lasting trustful relations and plans, written contracts, sustainable pricing, consistent sourcing against agreed/certified standards. Investing in producers means capacity building and organizational development, agronomy/climate/decent work programmes, and information and data (incl. price) transparency. Investing in consumers means choice editing, education and price incentives. Investing in the public means corporate policies mirroring SDG's, measuring and managing externalities, transparent communication and proactive advocacy.



Sabrina Bosson

*Associate Director, Fair Labor Association, Agriculture Program
Geneva, Switzerland*

Driving fair labour standards in food supply chains

The issue of fair labour standards in global supply chains has increasingly become a priority concern for key actors and stakeholders worldwide. The Fair Labor Association adopts a multi-stakeholder engagement approach for improving labour practices and workers' rights, engaging with socially responsible companies and suppliers, colleges and universities, and civil society organizations to integrate labour standards and labour compliance mechanisms into supply chain management. In order to achieve these goals, it is imperative to not only have sound commitment from top management of buying companies, but it is also necessary to provide capacity building for suppliers and supply chain actors, as well as to integrate effective management systems that abide by the Principles of Fair Labor and Responsible Sourcing. Furthermore, internal and external monitoring, collaborative remediation efforts and public reporting are crucial elements for strengthening the accountability of companies in complying with fair labour standards.

Day 2



Jim Bracken

*Sustainability Director, GS1 Global Office
Brussels, Belgium*

The role of traceability in ensuring transparency across the value chain

With increasing frequency the food sector and consumers are being impacted by food safety and sustainability issues which have highlighted the need for effective traceability of the entire food value chain. The GS1 systems of standards which are central to the normal day-to-day supply chain management processes from manufacturer to retailer also provide the basis of efficient and effective traceability systems. Complete supply chain traceability is possible using GS1's Electronic Product Code Information Services (EPCIS) standard, which leverages the Internet of Things to share event management data along the entire supply chain. Food Security and the UN Blue Number Initiative, which is led by ITC is designed to simplify the process of collecting and sharing data about farmers' and agribusinesses' compliance with good and sustainable agricultural practices. It will also help to create more visibility of the upstream food supply chains.



Friedel Huetz-Adams

*Senior Researcher, Suedwind-Institut
Bonn, Germany*

From the identification of hot spots to a more sustainable value chain

A hot spot analysis of the life-cycle of the product is a good tool to identify environmental and social problems in value chains. To tackle these deficits a holistic approach is essential. Currently many standard setting organizations examine either the ecological or social quality of products; however, only a few of them integrated both aspects. One of these is the Pro Planet Label, developed by REWE Group, which is supervised by a board of independent experts from non-governmental organizations, including Suedwind. To have an impact the process of labelling a product has to be combined with measures to support producers. Especially many farmers of tropical products like coffee, cocoa or mangoes are small-scale producers who might not be able to meet criteria of standard organizations without external support. Additionally a discussion about the price of many products is needed: farmers and producers need a decent wage and a decent income to produce things in a sustainable way.



4 SESSION OUTPUTS

This section contains summaries of the main outputs harvested from the forum's workgroup session. They form the basis for further project activities and business and stakeholder engagement over the next two years.



Summary 1:

KEY CHALLENGES IN FOOD SUPPLY CHAINS

In recent years, the consolidated power of retailers has steadily increased. It has been estimated that in Europe, only 5 retailers hold 50% of the market share (*BASIC, 2014*), and the share of private label products is estimated to reach 50% of global food retail sales by 2025 (*Rabobank, 2011*). This allows retailers to have an influential, two-fold role as buyers and providers for consumers. By using this advantageous position, retailers could drive change throughout their supply chain and achieve benefits in a social, environmental and economic context, with an impact felt on a wider global scale and amongst various stakeholders. The Business Forum was aimed as one contributory step towards this goal through the coordination and alignment of all related stakeholders' interests.

Managing change requires foremost knowing where change is needed. For this purpose the participants of the Business Forum firstly worked on identifying key hotspots in a supply chain and highlighted the strategic points of intervention for driving change in the social, environmental, and economic dimensions of sustainability throughout the farm to fork stages.

“Raising the sustainability standard of food supply chains requires: 1) increased transparency of supply chains, 2) national and international legislation promoting human rights, labour conditions and environmental protection, and 3) multi-stakeholder initiatives involving public and private actors as well as civil society.”

MARCEL GOMES – REPÓRTER BRASIL

The key challenges are summarized in the following table, differentiated by context.

Table 1a:
ISSUES IN A FOOD SUPPLY CHAIN



1 In cocoa production, women who are in charge of the farms often have difficulties to gain ownership over the lands. This in turn results in them not being able to benefit from either savings and credit systems or training and certification approvals (FAO, 2011). For more information regarding discrimination issues, see also Oxfam (2004) and Consumers International (n.d). See ILO (n.d) for issues regarding child labour.

2 70% of the world's food is being grown by smallholders, while in cocoa production this number increases to 90%. Nevertheless, smallholders also are also those who suffer from high levels of poverty, resulting from and amplified by fluctuations in prices and poor agricultural investments (Fairtrade, 2013). See also Oxfam (2013).

3 A high percentage of antibiotics, between 70–80% being sold in the US, are for use on livestock and poultry as an alternative to healthier living conditions, as a means to speed up the animal growth process (FDA, 2014).

Social
Human rights abuses, including here poor health and safety standards
Compliance with labour standards: child and forced labour, discrimination, freedom of association and bargaining ¹
Precarious employment
Gap between real wage and decent income
Diminished capacity of smallholders ²
Violation of land rights and conflicts
Diminishment of the indigenous community rights
Lack of local hiring and purchasing
Poor animal welfare ³

Environmental
Impact on climate change ⁴
Irrational use of natural resources: water and soil depletion, increased deforestation and desertification, loss of biodiversity ⁵
Use of pesticides and fertilizers (and associated impacts)
Energy and water consumption for irrigation
Food waste generation along the chain and loss of food variety
Increased consumption of materials used for packaging and poor recycling practices ⁶
Improper waste disposal

4 Food supply chains and agricultural cultivation in general contribute 20% of global GHG emissions. 40% of the latter is a by-product of nitrous oxide and methane emissions, another 40% is a result of deforestation for agriculture purposes and 20% results from fossil fuel emissions (CEA, 2014).

5 The production of soy has led to the loss of 55 million tons of topsoil resulting from erosion. This directly negatively affects soil fertility and contributes to the degradation of land. Erosion and land degradation has led to the loss of 1/3 of arable land globally (WWF, n.d.). See FAO (n.d.) for more information regarding impacts on biodiversity.

6 Around 425,000 tons of packaging material (15% carton, 17% plastic, 66% glass) are used for 3.5 billion cartons, 1.5 billion plastic bottles and 461 million glass bottles in the production of 5.5 billion liters of orange juice (CIR and Global2000, 2015). See Ernst and Young (2013) for more information about packaging and the food industry.

Table 1b:
ISSUES IN A FOOD SUPPLY CHAIN



7 96% of European suppliers in the food chain responded they have experienced one form of UTP in their work affair. In Italy, 57% of producers agree to unilateral amendments due to fear of facing trade restraints (*EC, 2014*).

8 In 2006, the Organic Trade Association which includes members such as Kraft, Dole and Dean Foods amongst others, managed to pass a provision on the 2006 Agricultural Appropriations Bill with the intention to weaken organic food standards in the latter. The provision allowed the use of “certain synthetic food substances in the preparation, processing and packaging of organic foods” (*Spielman, 2007*).

9 Price promotion strategies (deep discounting and below-cost selling) are usually implemented by supermarkets. Accordingly, the UK Competition recognized these strategies might have an impact on consumer mind sets, stating that it can “mislead consumers into thinking that the prices of all products sold by a grocery retailer are lower than is really the case” (*Consumers International, 2012*).

Business Practice	Policy
Increased tendency towards monopolization of the market	Regulation of the market and monopolization tendency
Unfair trading practices (UTPs) ⁷	Corruption and dependence on business ¹⁰
Lack of supply chain transparency	Access to legal institution ¹¹
Lack of traceability, low quality and safety of products	Weak or unregulated subcontracting practices ¹²
Variety, quality and reliability of certifications and labels ⁸	Weak policies and international binding legislation to avoid UTP and related practices along the supply chain
Poor quality of consumer information and communication	No mandatory regulation on labelling
Pricing policy of retailers and affordability of consumer ⁹	No binding regulation for minimum standards of sourcing
Tax avoidance and extracting wealth from value chain	Low legislative support for farmers and supervision of which products enter EU markets

10 One of the leading companies in orange juice production, both globally and in Brazil, Cutrale, has sponsored the re-election political campaign of the Brazilian President Dilma Rousseff with 6 million Reais or 1.4 million Euros. Moreover it has donated 4 million and 9.8 million for the Fome Zero programme of Lula da Silva (former Brazilian President) and different members of the opposition party that governs the state of São Paulo, respectively (*CIR and Global2000, 2015*).

11 The EU Supply Chain Initiative has been heavily criticized for the fact that it fails to provide dispute resolution mechanisms to non-EU suppliers in situations where principles of good practices are inadequately embodied, or simply not applied. A further limitation of the initiative is that it fails to provide sanctions and anonymity of complainants (*Van der Wal and Gulyás, 2014*).

12 Many companies unfairly reduce their own responsibilities, and many times fail to provide adequate and legal working conditions to plantation workers by hiring them through subcontractors who provide low paid, non-unionized, and often unsteady job opportunities. This is the case in Costa Rica, where approximately 50% of pineapple plantation workers are hired through subcontractors (*Consumers International, n.d*).



Summary 2:
**LEVERAGE POINTS FOR A SUSTAINABLE RETAIL
SUPPLY CHAIN**

To address the identified challenges, the workshop participants discussed in which fields an intervention would have the highest influence. Actors should concentrate on leverage points to enable the biggest impacts. A selection of key leverage points collected is displayed in Table 2.

“*Driving change in a supply chain requires understanding and being able to tap into the power of citizens/consumers and producers globally, as well as identifying and working with key retail players to demonstrate sustainable business engagements for long term value creation.*”

JAMES MWAI – FAIRTRADE AFRICA

Table 2:
KEY LEVERAGE POINTS FOR SUSTAINABLE
EUROPEAN FOOD CHAINS

“ A comprehensive overview of all relevant environmental indicators during the product’s lifecycle along the supply chain is necessary in the process of assessing organizations’ environmental footprints. The Organisation Environmental Footprint Sector Rules (OEFSRs) being developed by the EC in co-operation with public and private organizations aims to provide good counseling in this process. ”
SIMONE PEDRAZZINI – QUANTIS



Social	Environment	Business	Consumer	Policy
<p>Embrace international labour standards in company policies, secure jobs and do business with locals and workers</p> <hr/> <p>Support and provide capacity building for farmers (including smallholders)</p> <hr/> <p>Promote diversification of farming practices</p>	<p>Reduce packaging, re-use, or use eco-design for packaging while using recyclable and biodegradable material</p> <hr/> <p>Reduce the amount of pesticides and fertilizers in production practices or rely more on natural and human friendly alternatives</p> <hr/> <p>Promote cultivation practices which can preserve the quality of soil</p>	<p>Map the supply chain, establish due diligence systems and monitoring tools for suppliers to ensure transparency and traceability</p> <hr/> <p>Find a proper pricing policy which will align the interests of the company, suppliers and consumers and include externalized costs</p> <hr/> <p>Innovate to reduce and valorise food waste</p>	<p>Empower consumers through knowledge and information sharing and raise awareness for the value of sustainable food</p> <hr/> <p>Educate consumers and change their behaviour in the context of rational consumption</p> <hr/> <p>Mainstream sustainable lifestyle to consumers</p>	<p>Distort market consolidation</p> <hr/> <p>Enforce legislation that protects workers’ rights and removes unfair trading practices from taking place</p> <hr/> <p>Use different policy tools to promote sustainable production (tax incentives, subsidies, environmental standards)</p>



Summary 3: DEVELOPMENT OF JOINT VISION AND COLLABORATION

Building on the identified challenges and leverage points, Business Forum participants engaged in a joint exchange of ideas on how to best improve the current state of affairs of food chains. Through the application of the back-casting method, the focus was directed towards changes that will take place and those that are needed in the short- and long-term future.

“ *Supply chains are a common responsibility. Making them more sustainable means investing in common efforts to undertake feasible actions at a multi-stakeholder level. Reciprocal understanding, collaboration and partnerships between all stakeholders including retailers, farmers, consumers, and complemented by policy makers, are vital towards this goal.* ”

LOUISE LUTTIKHOLT – HELVETAS INTERCOOPERATION

Due to the complexity and heterogeneity of a supply chain, participants reinforced the need for joint activities and partnerships between different internal and external actors in the food supply chain. The latter is perceived to be necessary for the desired effects to be more effective and long lasting. Table 3 provides an overview of future visions and potential collaboration and partnerships for fair and sustainable food chains.

Table 3a:

FUTURE VISION AND POTENTIAL COLLABORATION AND PARTNERSHIPS FOR FAIR AND SUSTAINABLE FOOD CHAINS

Vision	Set (supply chain) measurable goals which will improve company performance	Establish clear overview of organization's impact	Increase appreciation for food and rational consumption	Strengthen institutions to protect human rights throughout the supply chain
Next Steps	Identify metrics of measure	Encourage impact assessment	Education, policies and awareness raising among consumers about rational consumption	Close co-operation between businesses, EU policy makers, other organizations and policy makers in the developing world
Collaboration/ Partnership	Retailers / Governments / International and Local CSOs / Technical Providers / Auditing and Monitoring Agencies / Standards Organizations / Research Institutions	Retailers / International and Local CSOs / Auditing Agencies / Standards Organizations	National Governments / Education Institutions / National Organizations / Consumer Organizations / Alternative Non-Formal Education Institutions / Journalists and Social Media Activists	EU Policy Makers / International and Local Human Rights Organizations / National Governments / Advocacy Groups / Retailers
Timeline	Present			

Table 3b:

Vision	Support sustainable farming practices; clean products and soil; happier animals and healthy people	Secure supply of crop	Shorter supply chains / more regional food on the supermarket shelves	Reduce use of pesticides substantially	Prevent loss of arable land
Next Steps	Capacity building for farmers; rewarding farmers for implementing ecofarming systems; retailers to require sustainable ways of production from suppliers	Research and innovation on established and new organic food varieties	Promotion of local food in retail stores and promotion of local food production and consumption by policy makers through incentivizing (financial) tools	Stricter EU regulation on the use of pesticides applying to EU and non-EU suppliers; authenticity of used pesticides; research and innovation on alternatives to synthetic pesticides	Research, innovation and implementation of soil friendly cultivation practices; reviving land impacted by deforestation and desertification
Collaboration/Partnership	Retailers / Suppliers / Farmers / CSOs / EU Decision Makers and National Governments / Monitoring Agencies / Agriculture and Sustainability Research Institutions / Animal Welfare Organizations	Agricultural Research Institutions / Farmers / Food Experts	Retailers / National Governments / Farmers / Producers / Consumer Organizations / EU Bodies	EU Policy Makers / Research Institutions / Monitoring Agencies / Health Agencies / Food and Pesticide Producers	Agricultural Research Institutions / Farmers / National Governments / Businesses
2020					

Table 3c:

Vision	Pay decent wages to workers for their work and products	Align certification and labelling schemes	Implement infrastructure that enables market access for smallholders	Achieve high levels of transparency and traceability of products and supply chains	Empower consumers to pay right/more for sustainably produced products
Next Steps	Implementation of sustainable pricing system	Multi-stakeholder approach where the interests of all parties are taken into account and constant monitoring of those	Capacity building for farmers and their close co-operations; market intervention	Multi-stakeholder approach on tracking and due diligence schemes; wide access to product and performance information (through ICT); provision of adequate and accurate information; EU policies to make the provision of information mandatory	Behaviour change; choice editing – making sustainable products the default choice
Collaboration/Partnership	Retailers / International and National Labour Organizations / Trade Unions / Suppliers / Farmers / Consumer Organizations / Pricing Experts / EU and National Regulators	Certification Bodies / Auditing and Monitoring Agencies / EU and National Governments / International CSOs / Retailers / Standards Organizations	Retailers / Suppliers / Farmers / EU and National Decision Makers / Business Development Experts / Funding Organizations	Retailers / Suppliers / CSOs / EU and National Legislation Makers / Auditing and Monitoring Agencies / Standards Organizations	EU Policy Makers / National Governments / Consumer Organizations / International and Local CSOs / Businesses / Producers / Research Institutions
2025					

Table 3d:

<p>Achieve zero food waste across supply chain and at the end-use phase, and high energy efficiency</p>	<p>Enable sustainable de-growth (better management of resources; internalize externalized costs)</p>	<p>Accomplish full implementation of SDGs</p>	<p>Realize fair public procurement</p>
<p>Changing mind-set; proper food storing along the supply chain; waste recycling and innovative recycling options; eco-design, using biodegradable material; relying on renewable energy</p> <hr/> <p>Retailers / Suppliers / Farmers / Research Institutions / Consumer Organizations / Waste and Energy Experts</p>	<p>Multi-stakeholder approach; policy makers to provide incentives for retailers and producers; systems that prevent externalizing costs</p> <hr/> <p>Retailers / EU Policy Makers / National Governments / Monitoring Agencies / International and National CSOs / Technical Providers</p>	<p>Promote, implement and include SDGs in organizations' strategies</p> <hr/> <p>EU Policy Makers / National Governments / International and National CSOs / Businesses</p>	<p>Multi-stakeholder approach; good governance practices and consider and implement all of proceeding steps</p> <hr/> <p>Retailers / Suppliers / Farmers / EU and National Policy Makers / Auditing and Monitoring Agencies / Standards Organizations / International and National CSOs / Consumer Organizations</p>
<p style="text-align: center;">2030</p>			

Vision

Next Steps

**Collaboration/
Partnership**

Timeline

THE SUSTAINABLE DEVELOPMENT GOALS and the OPPORTUNITY for Retailers

LARS MORTENSEN

WHERE ARE WE?

THIS IS A HISTORIC YEAR!

17 GOALS



RETAILERS PLAY A KEY ROLE!

NEXT 15 YEARS

MORE FOCUS ON SUSTAINABLE LIFESTYLES

MORE SOCIAL & ENVIRONMENTAL RESPONSIBILITY FOR COMPANIES

BEING AHEAD OF THE SDG MEANS COMPETITIVE ADVANTAGE

INFORMATION & KNOWLEDGE
RECYCLE & REUSE

How Do You BRING DIFFERENT STAKEHOLDERS TOGETHER?
COMMUNICATION



- BENEFITS:
- PROMOTE CSR
 - FORGE PARTNERSHIPS
 - INCREASE EXPOSURE for your organization
 - ENGAGE IN POLICY DEVELOPMENT
 - DIALOGUE WITH GOVERNMENTS
 - PARTICIPATE
 - EVERYBODY CAN BE A MEMBER

INCREASING EXPORTS

COLLABORATIVE POTENTIAL for a SUSTAINABLE EUROPEAN FOOD CHAIN

WORLD BANANA FORUM



WE ARE THREATENED!

ASYMMETRY OF POWER

LABOR, ENVIRONMENTAL & SOCIAL ISSUES

AN EXAMPLE TO FOLLOW!

WBF

2009 3 GROUPS

ECONOMIC SUSTAIN. LABOR

COALITION of BANANA COMPANIES

WORKPLACE HEALTH & SAFETY COMMITTEES

DEVELOP NATIONAL MANUAL

RATIFICATION of ILO CONVENTION

KNOWLEDGE BANK CREATION



BUILDING CAPACITY OF FARMERS

PARTNERSHIPS WITH MINISTRY of LABOUR & AGRICULTURE IN ECUADOR

HELVETAS INTERCOOPERATION

SUPPORTING PRODUCER GROUPS

A TRANSPARENT SUPPLY CHAIN

SUPPORTING WOMEN IN LOCAL MARKETS



REDUCE PESTICIDES in SWITZERLAND

REDUCING the USE of PESTICIDES without LOSING the ADVANTAGES

A PESTICIDE DIALOGUE



THIS DIALOGUE IS POSSIBLE!

5 CONCLUSION AND RECOMMENDATIONS

In a world of diverse and globalized supply chains, the food industry is a prime example of the variety of products that spread across all regions of the world. In this context, food supply chains have the potential to drive sustainability and contribute to the socio-economic and environmental development of societies that form part of these chains.

Food supply chains are characterized by their heterogeneous nature as they include farmers, suppliers and consumers, but are largely led by retail buying policies. Complemented by policy and decision makers, they work towards fulfilling interests which at times are poorly aligned with the interests of other stakeholders. Consequently, in practice, problems with transparency, value distribution and other social, environmental, economic and ethical issues are increasingly connected to food value chains. The impacts of these have asymmetrically affected the Global South and the world's poorest.

RETAILERS AS CATALYSTS TO SUPPLY CHANGE

With their growth in size, power and consolidated market share, European retailers are considered to be the key strategic actors to drive change throughout the food supply chain and contribute to improving the sustainability performance of the food chain and its associated actors (*Chkanikova & Mont, 2012*). Retail groups can be the catalysts for creating fair and green supply chains and implementing sustainability standards. However, given the complexity of supply chains, the contributions, collaboration and committed involvement of all actors in the chain are required for long lasting results.

Additionally, a level playing field where sustainability achievements are recognized and market leaders not disadvantaged against those with a disregard for basic standards, is necessary. The foundations for this are threefold:

- **Provision of transparent consumer information on best and worst performance to support increasing ethical shopping demand and enable responsible shopper choice.**
- **The co-operation of the industry to set improved good practice guidelines, minimum standards and commitments to reporting.**
- **A supportive policy environment addressing minimum standards, unfair trading practices and consumer communication and information guidelines.**

“*Setting standards for products and labelling them can be an important tool to make value chains more transparent. But this tool is only part of the holistic approach needed to support small-scale producers and farmers to be able to earn a decent living.*”

FRIEDEL HUETZ ADAMS – SUEDWIND-INSTITUT

With these needs in mind, the EU funded project SUPPLY CHA!NGE aims at driving change in this field and advancing supply chains to be fair and more sustainable. With partners in 28 European countries the project has a particular focus on supermarket store brand chains – those where brand information is often least accessible but retailer control is highest. Therefore, the SUPPLY CHA!NGE Business Forum Report has as its target: retailers, suppliers, consumers and policy makers. This engagement is built upon the principle of co-operation and constructive dialogue to achieve change.



COLLABORATIVE OPPORTUNITIES FOR A FAIR AND SUSTAINABLE SUPPLY CHAIN

Managing and transforming the complexity of retail supply chains has proven to be a difficult task and this report has highlighted industry and multi-stakeholder collaboration and partnerships as a key route to address this. Key potential opportunities for collaboration within the industry are identified in:

- **Sharing best practices and developing aligned and compatible standards to reduce the possibility of conflicting approaches.**
- **Engaging suppliers and developing common expectations, building capabilities that will in turn result in better and stronger relationships in the long-term.**
- **Collaborating with relevant civil society organizations to continuously increase retailer expertise, understanding and perspective of value chains. Working with EU and national policy makers in setting and implementing policies and guidelines.**

“ There is a business case for precompetitive co-operation, referring to innovation. There is a need to create win-win situations. In order to achieve this, the common factor to create effective Public Private Partnerships is the need for a neutral convener. A common debate between different actors, including civil society organizations, can place company and government representatives outside their comfort zone. This situation requires strategies and relationships which prove to be mutually beneficial and reinforcing to all parties involved. ”

VICTOR PRADA – FAO

10 ACTION STEPS TO IMPLEMENT A FAIR AND SUSTAINABLE SUPPLY CHAIN

Following the content of this report, a summary of top 10 recommendations focused on retailers as the key driving agent and coordinator of stakeholders to enable improved food chains is provided here:

“*To create positive impact through power-full relations of retailers and brands we can't only wait for action via policy, consumers, investors, technology or better times, and we must stop doing what is clearly not fair and sustainable. It's time to act now and create confidence for the next generation that the farming business is a viable option to them. To date this confidence doesn't exist.*”

ANDREAS KRATZ – FAIRTRADE INTERNATIONAL

1. Analyse sourcing performance, map supply chain and include all entities involved.
2. Identify ecological and social hotspots and critical intervention points and work closely with partners to remedy them.
3. Communicate with and request suppliers and their sub-tiers to include sustainability considerations in their production patterns.
4. For long-term enhanced productivity, invest in the capacity building of partners (farmers and suppliers).
5. Adopt and implement established codes of conduct, guidelines and standards, beyond compliance.
6. Set measurable goals and identify measurable metrics.
7. Implement supply chain auditing and monitoring mechanisms beyond the first tier.
8. Communicate company value, sustainability performance and increase transparency by establishing reporting practices regarding financial and non-financial data.
9. Engage consumers by highlighting key issues and providing point-of-sale navigation on responsible choice to become their trusted supplier.
10. Forge and join collaboration and partnership initiatives to be a recognized sustainability leader.

PROMISING INITIATIVES

THE POWER of POWER-FULL RELATIONS



IT IS OUR PROBLEM!

THIS WORK IS DANGEROUS & NOT REWARDING!



WE ARE FACING a FOOD CRISIS



IN THE FUTURE, CAN WE AFFORD TO NOT PAY FOR EXTERNAL COSTS and BE PAID FOR EXTERNAL BENEFITS?

ACTIONS MATTER!

PRINCIPLES

FAIRNESS
STABILITY
SUSTAINABILITY

ACTUALLY, IT'S EASY..



INVESTING IN TRUST
CELEBRATE THE STEPS TAKEN



PARTNERSHIPS
EDUCATE CONSUMERS



THE BLUE NUMBER INITIATIVE

DATA STAY PRIVATE

TRACEABILITY
SHARING INFORMATION IS THE REAL POWER

IDENTIFY
CAPTURE
SHARE



TRACEABILITY IS A GAME CHANGER!

FROM THE IDENTIFICATION of HOTSPOTS to a MORE SUSTAINABLE VALUE CHAIN

IDENTIFYING HOTSPOT CATEGORIES



INCLUSION of PROJECT PARTNERS

LIST of PROPOSALS

FEASIBILITY ASSESSMENT

IMPLEMENT MEASURES

LABEL AWARDING

CERTIFICATION IS A TOOL TO INDICATE COMPLIANCE TO CERTAIN STANDARDS

IT'S ABOUT HAVING IMPROVED!



PRICES SOCIAL GENDER

WHAT'S IN IT FOR ME?



HOLISTIC APPROACH EVALUATION

DIVERSIFICATION of CROPS
BUSINESS ENVIRONMENT

DRIVING FAIR LABOR STANDARDS in Food SUPPLY CHAINS



BRAND ACCOUNTABILITY

TRACEABILITY & RISK MAPPING

INTEGRATE LABOR COMPLIANCE

BUILDING MANAGEMENT SYSTEMS

EXTERNAL ASSESSMENT

CONSULTATION & REMEDIATION

NESTLE IN COTE D'IVOIRE, FOR EXAMPLE...

PROGRESS ON CHILD LABOR



SYNGENTA IN INDIA

GENDER DIALOGUE PROJECT
GENDER ACTION LEARNING FOR SYSTEMIC CHANGE

WHERE TO NEXT? INVOLVEMENT IN UPCOMING PROJECT ACTIVITIES

Food supply chains are complex systems requiring a holistic approach for transforming them. The European funded SUPPLY CHA!NGE project and the business engagement activities aim to be a key movement in driving this transformation. The Business Forum and this subsequent report represent the first efforts for cooperative and constructive multi-stakeholder activities that the project is planning to implement. The next steps include capacity building, European and national retailer roundtables and multi-stakeholder scenario workshops towards making supply chains more fair and sustainable. This process will involve the engagement of over 400 European decision makers. Given the transformative power of supermarkets in achieving sustainability throughout food supply chains, the SUPPLY CHA!NGE project invites all European retailers to become part of this transition.

To become involved and learn more about the SUPPLY CHA!NGE project, it's past and future activities, and to obtain detailed information about the Business Forum, including panellist presentations, please visit our website www.supplychainge.org/the-business-forum or contact us.

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