THE JOURNEY TO SUSTAINABLE FOOD

A three-year update on the Behind the Brands campaign

In February 2013, Oxfam launched the Behind the Brands campaign to challenge the 'Big 10' food and beverage companies on their social and environmental policies and practices, and to amplify the voices of key stakeholders such as farmers, communities, consumers and investors calling on them to take action.

The companies have made significant new commitments over the past three years to improve social and environmental standards in their vast supply chains. But the companies must now ensure that their suppliers actually change their practices in line with the commitments made. And to accelerate the transformation towards a more sustainable food system, the companies must go further and adopt new business models in their supply chains to ensure that more of the power and the value reaches the farmers and workers who produce their ingredients.

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SUMMARY

The newly updated Behind the Brands scorecard shows that the ‘Big 10’ food and beverage companies have made significant new commitments over the past three years to improve social and environmental standards in their vast supply chains. Pushed by over 700,000 actions by concerned consumers, progress has been most evident in the areas of protecting land rights, reducing greenhouse gas emissions and tackling gender inequality. But there is much work still to do.

These companies must now ensure that their suppliers actually change their practices in line with the commitments made. But to accelerate the transformation towards a more sustainable food system, the companies must go much further and fundamentally re-write the business models in their supply chains to ensure that much more power and much more of the value their products generate reaches the farmers and workers who produce their ingredients.

Figure 1: Overall score changes per company from 2013 to 2016

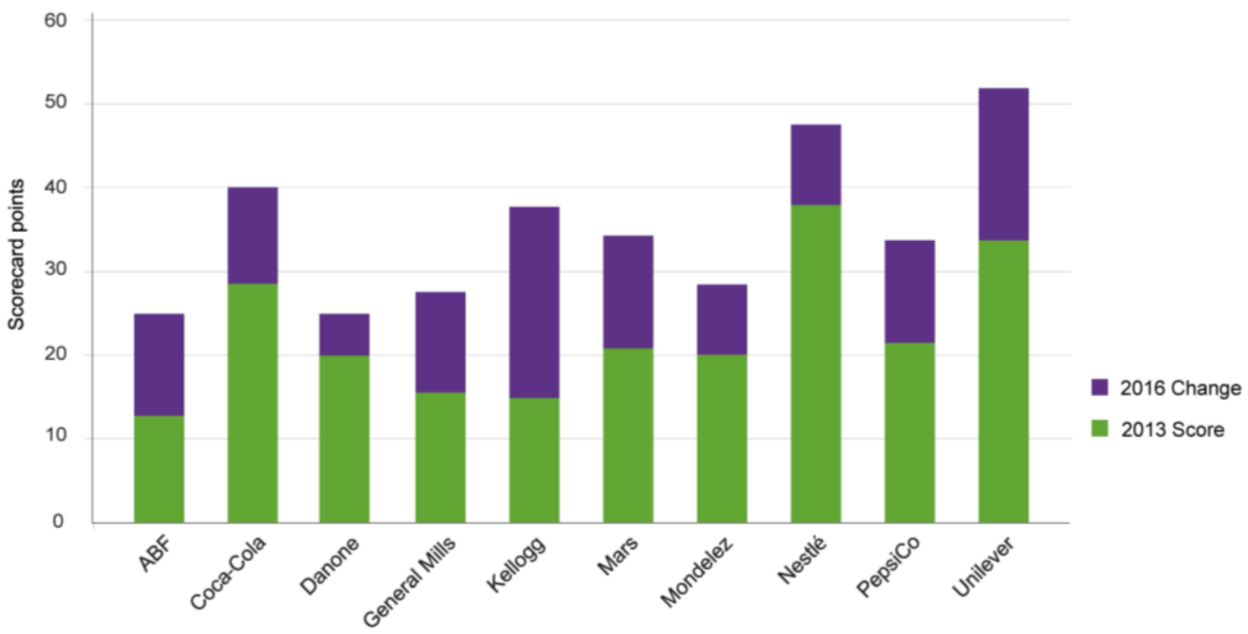


Figure 2: Behind the Brands scorecard February 2013

8 - 10 Good | 6 - 7 Fair | 4 - 5 Some progress | 2 - 3 Poor | 0 - 1 Very poor

Rank	Company	Score	Land	Women	Farmers	Workers	Climate	Transparency	Water	Total
1	Nestlé	54%	3	4	5	6	6	7	7	38/70
2	Unilever	49%	3	2	7	6	5	5	6	34/70
3	Coca-Cola	41%	1	5	3	6	5	5	4	29/70
4	PEPSICO	31%	2	2	3	3	3	4	5	22/70
5	MARS	30%	1	1	5	4	3	5	2	21/70
=6	DANONE	29%	1	1	1	3	3	6	5	20/70
=6	Mondelēz International	29%	1	2	4	4	3	4	2	20/70
=8	GENERAL MILLS	23%	1	2	1	3	2	2	5	16/70
=8	Kellogg's	23%	1	2	1	2	2	4	4	16/70
10	Associated British Foods plc	19%	1	1	2	3	1	3	2	13/70

Figure 3: Behind the Brands scorecard April 2016

0 - 1 Very poor | 2 - 3 Poor | 4 - 5 Some progress | 6 - 7 Fair | 8 - 10 Good

Rank	Company	Score	Land	Women	Farmers	Workers	Climate	Transparency	Water	Total
1	Unilever	74%	7	6	8	8	9	7	7	52/70
2	Nestlé	69%	8	5	7	6	8	7	7	48/70
3	Coca-Cola	57%	8	6	3	6	6	5	6	40/70
4	Kellogg's	53%	5	6	5	3	8	5	5	37/70
=5	MARS	49%	4	5	5	4	6	6	4	34/70
=5	PEPSICO	49%	7	4	3	3	7	5	5	34/70
7	Mondelēz International	41%	4	6	4	4	5	4	2	29/70
8	GENERAL MILLS	40%	2	3	3	3	6	5	6	28/70
=9	Associated British Foods plc	36%	5	3	3	4	4	3	3	25/70
=9	DANONE	36%	2	2	3	3	6	5	4	25/70

1 INTRODUCTION

In a world that produces enough food for everyone, almost 800 million people endure chronic hunger. Power over our global food system is concentrated in the hands of a small elite of government and corporate interests, and is too often denied both to the hundreds of millions of small-scale food producers who grow most of our food, and to the billions of us who consume it. If we are to achieve the new Sustainable Development Goal of ‘zero hunger’ by 2030, then this unequal food system, and the business models that underpin it, must be radically transformed.

The good news is that change is happening, and some of the world’s largest food and beverage companies have the means to accelerate it. Just ten of those companies, the ‘Big 10’ – Associated British Foods (ABF), Coca-Cola, Danone, General Mills, Kellogg, Mars, Mondelēz International, Nestlé, PepsiCo and Unilever – collectively generate revenues of more than $1.1bn per day[1] and employ millions of people directly and indirectly. Their supply chains are linked to every part of the food system, from the small-scale producer to the everyday consumer.

In February 2013, Oxfam launched the Behind the Brands campaign to challenge the social and environmental policies and practices of the Big 10, and to critically amplify the voices of key stakeholders such as farmers, communities, consumers and investors calling on them to take action. This report provides an overview of progress made in the three years since.

More than 700,000 campaign actions were taken by Behind the Brands supporters urging the Big 10 companies to improve their policies. From targeted online social media to offline mobilizations and email petitions, Oxfam supporters have successfully influenced companies to adopt policies which can positively impact the lives of millions of people living in poverty.[3] The latest update of the Behind the Brands scorecard published in this report shows clear improvements from all companies in many areas. All but one has improved its score by at least 10 percent over the past three years.

‘The Oxfam [campaign] reflects a new era in the relationship between companies and campaigners – one in which activism and collaboration combine.’

Sarah Murray, *Financial Times* (2013)[2]

The results show that the Big 10 have demonstrated a better understanding of key supply chain issues and made new, stronger policy commitments, particularly in areas like gender equality, land rights and climate change. But the work is just beginning: companies now need to ensure that their suppliers actually change their practices.

But even with full implementation, these incremental steps can only bring us so far. To accelerate the transformation towards a truly just and sustainable food system, companies need to fundamentally re-write the business models in their supply chains to ensure that much more power and much more of the value their products generate reaches farmers and workers; for example via an increase in farmer- and worker-owned businesses in supply chains.

If this systemic change does not take place, companies will remain rich, while farmers and workers will stay trapped in poverty. Oxfam will continue to engage and hold to account the Big 10 companies as they implement the commitments they have made to date. But we will also continue to push these and other companies and government elites to go further, and more radically shift power within the food system towards those who grow our food and those who consume it. That is the only way that the zero hunger vision to which our governments have committed will become a reality.

Figure 4: Behind the Brands scorecard April 2016 (with score changes since February 2013)

	Workers	Women	Climate change	Water	Land	Farmers	Transparency	Overall score
ABF	4	3	4	3	5	3	3	36%
Change	1	2	3	1	4	1	0	17%
Coca-Cola	6	6	6	6	8	3	5	57%
Change	0	1	1	2	7	0	0	16%
Danone	3	2	6	4	2	3	5	36%
Change	0	1	3	-1	1	2	-1	7%
General Mills	3	3	6	6	2	3	5	40%
Change	0	1	4	1	1	2	3	17%
Kellogg	3	6	8	5	5	5	5	53%
Change	1	4	6	1	4	4	1	30%
Mars	4	5	6	4	4	5	6	49%
Change	0	4	3	2	3	0	1	19%
Mondelez	4	6	5	2	4	4	4	41%
Change	0	4	2	0	3	0	0	13%
Nestlé	6	5	8	7	8	7	7	69%
Change	0	1	2	0	5	2	0	14%
PepsiCo	3	4	7	5	7	3	5	49%
Change	0	2	4	0	5	0	1	17%
Unilever	8	6	9	7	7	8	7	74%
Change	2	4	4	1	4	1	2	26%
Average Big 10 score	4.4	4.6	6.6	4.9	5.2	4.4	5.2	50%
Average Big 10 change	0.4	2.4	3.3	0.7	3.7	1.2	0.7	18%

2 THE SEVEN THEMES: KEY CHANGES OVER THREE YEARS

Three years ago, the Big 10 were lagging in their approach to social responsibility and sustainability in their supply chains, reflected in poor scores across the board on the first Behind the Brands scorecard. In February 2013, seven of the ten companies had overall scores of 31 percent or below. By April 2016, no company scored below 36 percent. At the start of the campaign, the scores of the three leading companies, Nestlé, Unilever and Coca-Cola were 54, 49 and 41 percent, respectively. By April 2016, the top three scores were 74, 69 and 57 percent for Unilever,Nestlé and Coca-Cola respectively.

'Behind the Brands isn't the first index of its kind; however it is the first multi-faceted benchmark on sustainable supply chains. It has raised the bar on what's considered acceptable company behavior, and provided a rigorous methodology and set of indicators for others to use.'

Forum for the Future[4]

Box 1: How the Behind the Brands scorecard works

A good way to assess whether companies are committed to sustainable and responsible practices is by evaluating their corporate policies. The Behind the Brands scorecard focuses on publicly available information relating to the policies of the Big 10 companies, focusing on seven themes:

- **Land** both rights and access to land and sustainable use of it
- **Women** farm workers and small-scale producers – in the supply chain
- **Farmers** (small-scale) growing the commodities
- **Farm workers** in the supply chain
- **Climate change** commitments to reduce greenhouse gas emissions and deforestation in agricultural supply chains, and to help farmers adapt to climate change
- **Transparency** at a corporate level
- **Water** both rights and access to water resources and sustainable use of it

For each of these themes except transparency, the indicators are grouped into four indicator categories (each worth one-quarter of the score available for that theme): awareness; knowledge; commitments; and supply chain management. The scores in each category are based on information in publicly available documents that addresses the following questions:

Awareness: Does the company demonstrate general awareness of key issues relating to that theme and does it conduct projects to understand and address these key issues?

Knowledge: Does the company demonstrate that it measures, assesses and reports key issues and facts specifically in its supply chains that relate to that theme?

Commitments: Does the company commit to addressing the key issues relating to that theme in its supply chains?

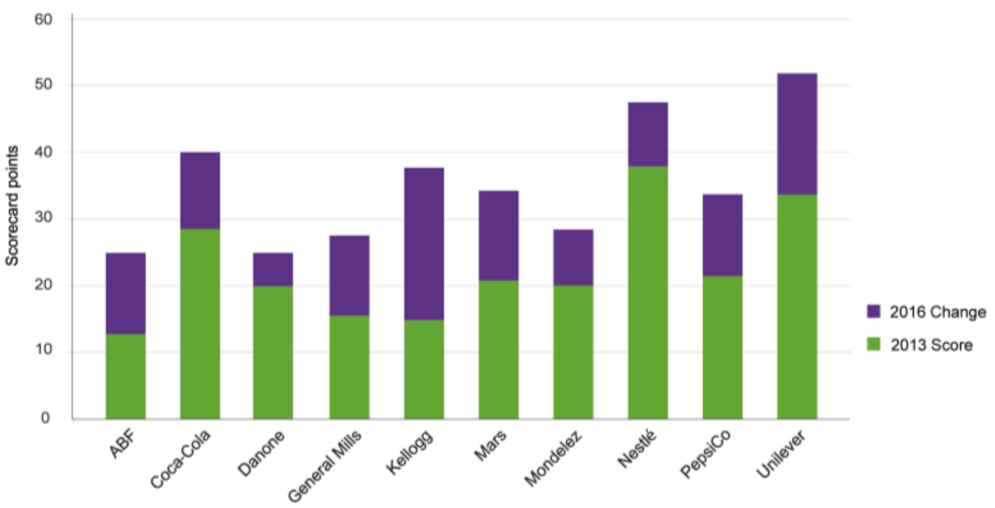
Supply chain management: Does the company require its suppliers to meet relevant standards related to that theme?

The transparency theme has a broader focus and rewards companies for disclosure on cross-cutting and corporate-level issues, including taxation.

Oxfam has updated the scorecard annually since it was launched in February 2013, with additional updates being undertaken to reflect noteworthy progress by the Big 10. The annual updates include revisions of the indicators to reflect advancements in best practices within the sector. All the assessments and indicator changes are completed after engagement with the Big 10 and industry experts. A detailed description of the methodology and every indicator assessed in the scorecard is available at **www.behindthebrands.org/about**

Between 2013 and 2016, there has been an improvement of four points or greater on scorecard scores for ABF (land), Coca-Cola (land), General Mills (climate), Kellogg (climate, farmers, land, women), Mars (women), Mondelēz (women), Nestlé (land), PepsiCo (climate, land) and Unilever (climate, land, women). Indeed for all the four themes, land, women, climate change and farmers, at least one company improved their score by at least four points out of ten. The overall scores for each company improved by at least 10 percent, except for Danone (improved by 7 percent). The strongest improvement in overall scores was made by Kellogg, which improved by 30 percent, followed by Unilever, improving by 26 percent.

Figure 5: Overall score changes per company 2013–2016



Throughout the campaign, Unilever and Nestlé have led the pack, with Unilever taking the top spot from Nestlé after two years. Coca-Cola remains third at 57 percent, followed by Kellogg at 53 percent. ABF was in last place in 2013 and remains the poorest performer, along with Danone, in 2016. ABF scores 36 percent despite improvements by some of its subsidiaries – notably Illovo Sugar on land.

The changes have not been limited to the Big 10, as Behind the Brands has seen evidence of major suppliers feeling pressure from the Big 10 to also adjust the way they do business. While there is no systematic analysis of how the suppliers of the Big 10 have changed their practices, there is anecdotal evidence that this is happening, particularly on gender and land (e.g. Coca Cola in Brazil engaging their suppliers on land rights). As a major supplier to the Big 10 told Oxfam : 'we're being asked by one of our biggest customers to change how we deal with land rights, so we'd like to change our processes and need your input'.[6]

'...we will continue to do our part to be an advocate for positive change and design action-oriented solutions. This will involve sustained engagement with our supply chain partners and other key stakeholders. Holding ourselves and our suppliers to high sourcing standards allows us to support sustainable agriculture for the long-term benefit of not only for company and stakeholders, but for farmers and communities.'

Pedro Massa, Shared Value Director, Coca Cola Brazil[5]

LAND

What is the issue?

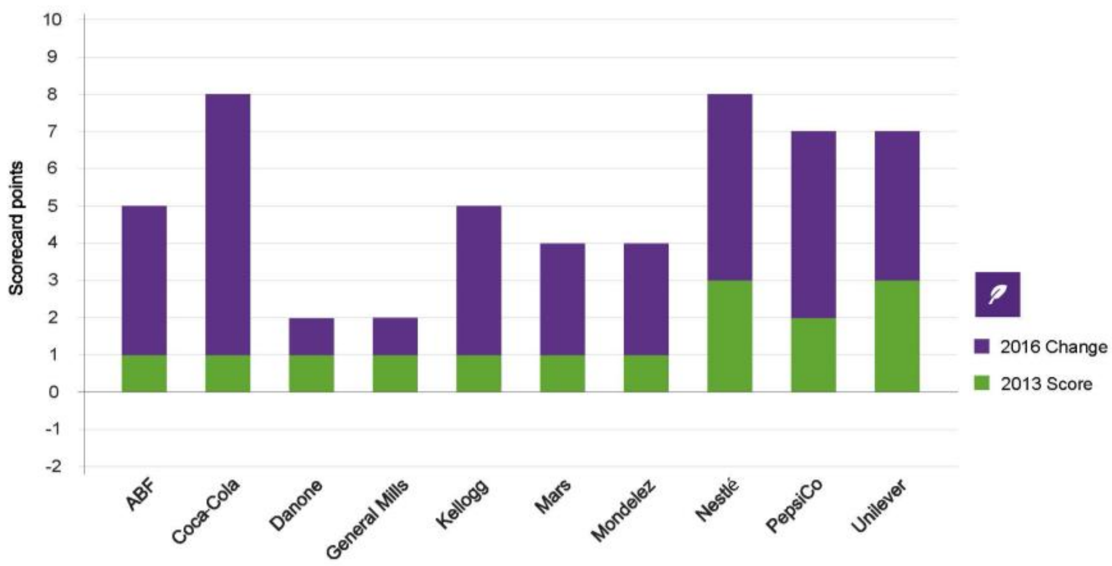
Secure land rights are key to addressing hunger. In 2013, The Big 10 were failing to address land rights concerns in their supply chains and none of the companies had credible land rights policies. Land was the lowest scoring theme on the first Behind the Brands scorecard.

Land governance is weak in many countries, and often favours corporate interests over the rights of local farmers and communities. Governments have a pivotal role to play in protecting rights through legislation. But when government officials and the judiciary don't do their jobs to protect people's land rights, small-scale producers may be displaced. It is a responsibility of the Big 10 to show zero tolerance for land grabbing.

What has changed since 2013, and what's next?

- Behind the Brands supporters took more than 270,000 actions calling on companies to recognize and adopt policy commitments to respect the land rights of communities.
- Six of the ten companies have integrated the principle of Free Prior and Informed Consent (FPIC) into their supplier codes or similar supplier principles to ensure that communities are consulted and give consent when the land they use is sold or leased. By the end of 2015, Illovo Sugar (a subsidiary of ABF), Coca-Cola, PepsiCo, Nestlé, and Unilever had all committed to zero tolerance for land grabs in their supply chains.
- Seven of the ten companies have assessed land-related issues linked to their commodity sourcing. Most of these companies have plans to conduct additional assessments. Coca-Cola, for instance, plans to conduct 28 land-related baseline studies by 2020.
- In 2013, all Big 10 companies scored three or less on the scorecard for land, with seven companies receiving a score of one. Three years later, Coca-Cola and Nestlé score eight and Unilever and PepsiCo score seven.
- Danone and General Mills still fall far short on their land commitments, but the progress by other companies shows how land rights are becoming more of a priority for the industry.
- Coca-Cola and Illovo Sugar regularly participate in land rights conferences such as those hosted by the World Bank, and have become strong voices in the industry for land rights causes.

Figure 6: Overall score changes 2013–2016: LAND



Companies are still in the early stages of understanding how to deal with land rights issues, and their policy commitments still need to be translated into implementation. This will take continued commitment and investment to ensure that zero tolerance to land grabs becomes a reality. Engaging with suppliers who are committed to these same principles will be critical. Oxfam will continue to work with others to monitor their progress.

WOMEN

What is the issue?

Women are often in the best position to create solutions to hunger and to act as agents of change, but because they make up the majority of those living below the poverty line and face daily discrimination, they often bear the heaviest burdens. When women have control over their own income or family earnings, they reinvest in their families, children, and community. In 2013, the Big 10 were quiet on addressing the specific challenges women producers face within their supply chains.

Empowering women is critical in achieving food security and economic development and is at the heart of Oxfam's work. The case for companies to empower women is strong and doing so will mean improved quality, productivity and reliability in their supply chains.[7]

What has changed since 2013, and what's next?

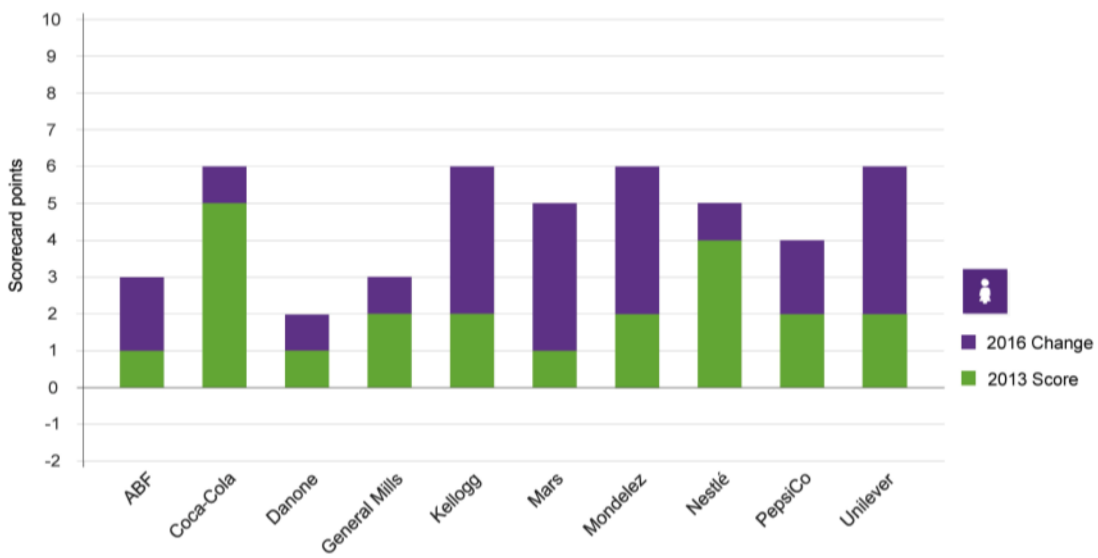
- Eight of the ten companies, except Danone and ABF, have signed the UN Women's Empowerment Principles.[8]
- Eight of the ten companies, except Danone and General Mills, have conducted assessments with all or some focus on the impact of women producers and workers in their supply chains.

Over the last three years, most companies have made some improvements to address women's empowerment, and while no company has achieved a high score on this theme, it is clear that some are beginning to understand the unique challenges, risks and daily discrimination women face in their supply chains and why this is relevant for their businesses. Companies need to use their power to call on governments for stronger legislation, to help define global standards and to ensure women workers become a priority for their suppliers. The Big 10 now need to implement their commitments and Oxfam will continue to encourage and monitor progress. For instance, in 2015 Oxfam facilitated a multi-stakeholder process with the big cocoa companies and traders to identify emerging good practice in the cocoa industry for empowering women farmers.[10] This is a good start to the kind of future changes in practice we hope to see.

'If you want to empower a woman it doesn't help unless you also support her to access resources… we need to look at women's specific needs and take away the specific barriers which women are facing'

Monica Aidoo Dadzie, Kaupa Kokoo cooperative, Ghana[9]

Figure 7: Overall score changes 2013–2016: WOMEN



FARMERS

What is the issue?

Increasing the productivity, self-reliance and economic opportunity of small-scale farmers is the key to building global food security in a resource-constrained world. More than 400 million farms worldwide are two hectares or smaller (less than five acres).When it comes to policies addressing issues for small-scale producers, companies need to ensure that those who feed the world do not go hungry themselves.

What has changed since 2013, and what's next?

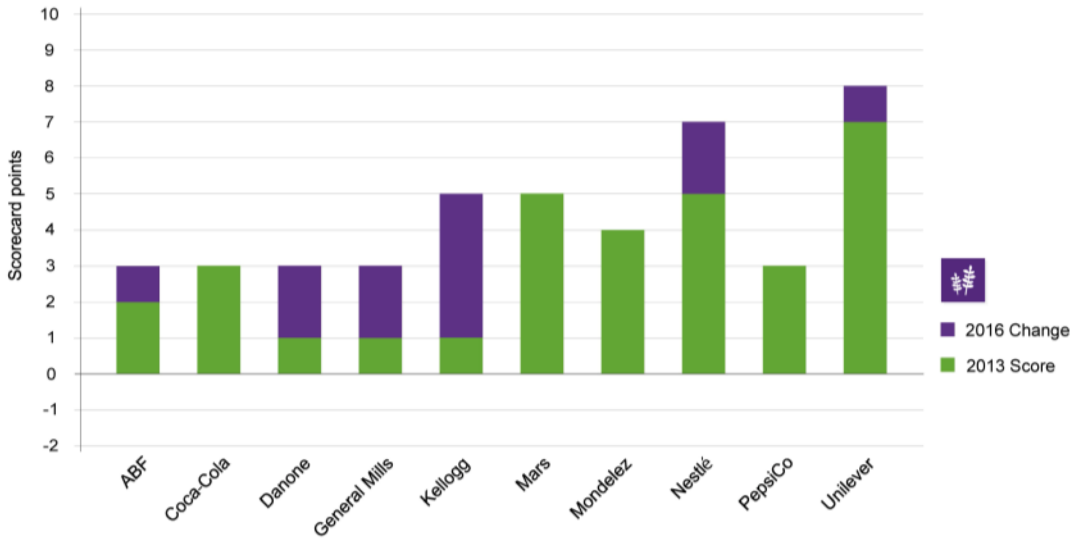
- Unilever is the only company of the Big 10 to ask its suppliers to make fair deals with small-scale farmers and to support organizations that enable farmers' rights and protect their livelihoods.
- Nestlé has carried out and published several impact assessments and has the most advanced disclosure of sourcing from small-scale farmers among the Big 10.
- Kellogg has increased its policy commitments significantly over the three

years, jumping from a score of one to five-out-of-ten as a result of new assessments to understand issues faced by farmers and new commitments to help farmers improve their situation.

A living income for small-scale producers can only be achieved if revenue from production is high enough to cover production costs along with the margins necessary for a decent life. Policies aimed at assuring sufficient income for small-scale producers must ensure fair contracts and supply terms, access to resources needed to grow and produce food, and increased bargaining power in supply negotiations.

As the Big 10 grapple with sourcing agricultural commodities produced by small-scale producers, they need to make significant changes in how prices are set.

Figure 8: Overall score changes 2013–2016: FARMERS



FARM WORKERS

What is the issue?

More than one billion people work in agriculture – 35 percent of the global workforce. Agriculture is the second-largest source of employment worldwide. The Big 10 have barely shown any improvement on the issue of labour rights in their supply chains and many are not showing an interest in empowering farm workers so that they can provide for their families. The table below shows the range of possibilities for workers in global supply chains.[11]

THE ROAD TO A LIVING WAGE

UNSUSTAINABLE ⟷ SUSTAINABLE

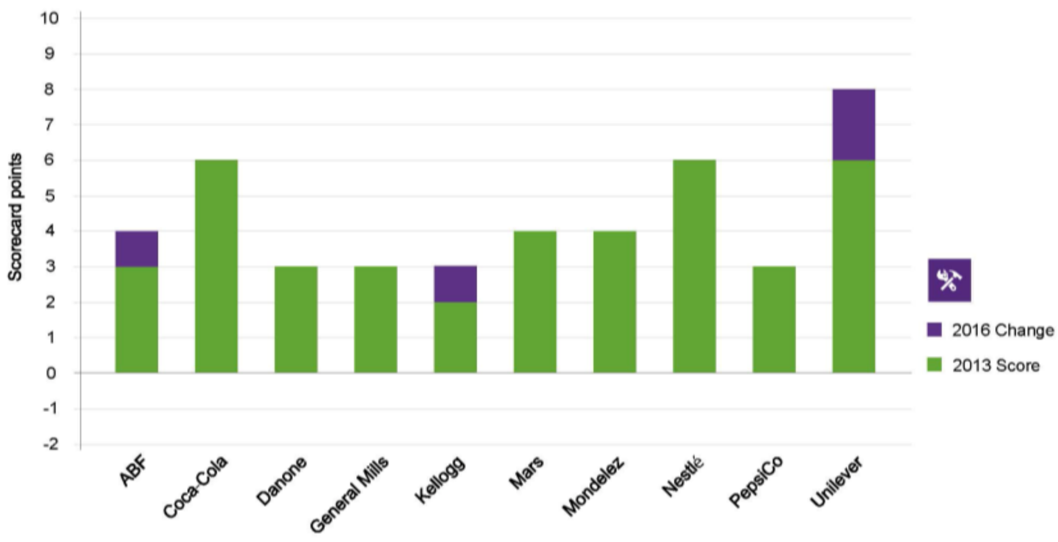
ILLEGAL ROAD Does harm	LOW ROAD In-work poverty	MEDIUM ROAD Does some good	HIGH ROAD Does good
Forced labour, denying workers their human rights and freedom, and child workers their education.	**Subsistence wages only. Work on legal but low wages, excessive hours, often insecure. No worker voice or representation.**	**Wages above the legal minimum, with secure contracts. Workers have some representation**	**Secure work on a living wage, based on a collective bargaining agreement.**
			
E.g. Trafficked slave labour in the Thai seafood industry.	E.g. Unrest and poor nutrition in the Cambodia garments sector.	E.g. Slow improvements in Kenyan flower pack houses.	E.g. Wellbeing at a living wage employer in the Dominican Republic.
Photo: Environmental Justice Foundation	Photo: Heather Stilwell/ Clean Clothes Campaign	Photo: Oxfam	Photo: DailyBruin.com

What has changed since 2013, and what's next?

- Unilever has consistently had the highest score on farm workers over the three years, scoring eight out of ten. Nestlé and Coca-Cola have also made progress, scoring six out of ten.
- Currently, only Unilever has a strategy in place to raise low farmer wages and to ensure steps are taken to implement this.
- Some Big 10 companies are engaging with the International Union of Food (IUF), an important organization representing workers in the food and agricultural industry.

A living wage does more than keep people out of poverty. It allows them to participate in social and cultural life and provide for their families. However, if the industry is to achieve living wages in their supply chains, the Big 10 companies need to lead by ensuring that they are paying fair prices to producers and that workers have an opportunity to collectively bargain through their representation by trade unions.

Figure 9: Overall score changes 2013–2016: WORKERS



CLIMATE CHANGE

What is the issue?

Climate change is already causing havoc in global agriculture, wrecking the livelihoods of small-scale food producers and hitting the bottom lines of major food companies. In 2015, Unilever's chief executive reported that it faced additional business costs of EUR3–400m due to extreme weather.[12]

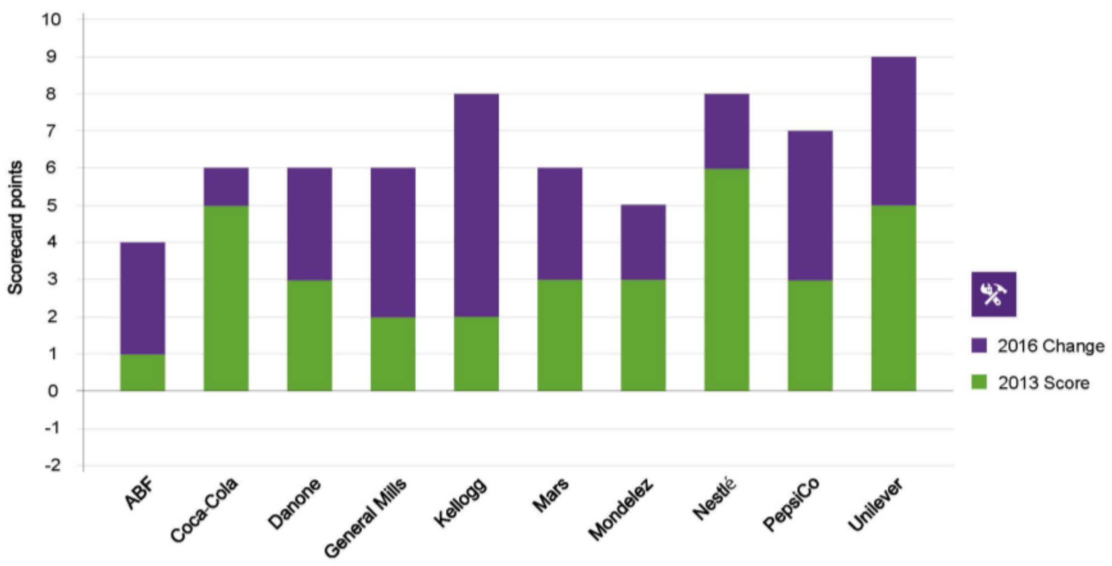
Yet the food and beverage industry is itself a major contributor to global greenhouse gas emissions. Behind the Brands revealed that the emissions of the Big 10 alone are equivalent to the annual emissions of every country in Scandinavia combined.[13] The major part of these emissions stems from agricultural production in supply chains, and in 2014 this was not covered by the emissions reduction targets the companies had set.

What has changed since 2013, and what's next?

- Kellogg and General Mills have made ground-breaking commitments by adopting ambitious science-based targets to reduce greenhouse gas emissions across both their operations and supply chains. Both companies also made significant commitments to deforestation-free commodity sourcing.
- Kellogg moved from a score of two in 2013 to a score of eight-out-of-ten in 2016, through their new commitments on climate change. .
- ABF, Danone, Mars, PepsiCo and Unilever have all also made significant improvements over the three years.

In December 2015, governments came together to adopt a historic climate agreement at the COP21 in Paris. Oxfam continues to press the companies on their climate change policies and in 2016 will publish new recommendations on what the Paris deal means for them.

Figure 10: Overall score changes 2013–2016: CLIMATE CHANGE



TRANSPARENCY

What is the issue?

While the Behind the Brands scorecard is in essence an assessment of transparency (because only publicly available information is assessed), the separate theme of transparency looks in detail at cross-cutting issues of disclosure such as where and with whom companies do business, and what they disclose on their tax arrangements.

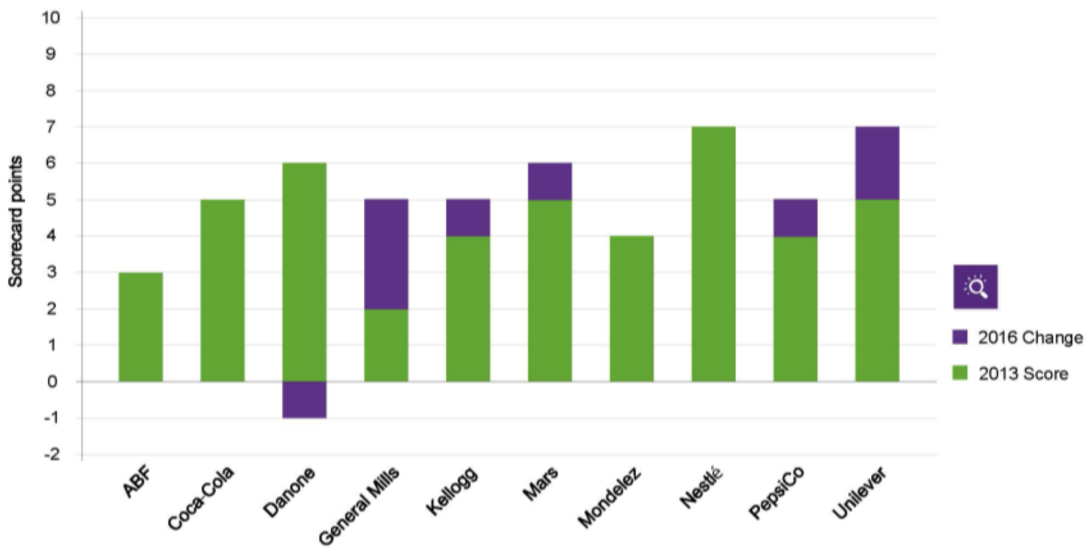
None of the Big 10 currently voluntarily discloses key public fiscal information, which is necessary to assess whether a company is paying its fair share of taxes in the various countries in which it operates.

What has changed since 2013, and what's next?

- Nestlé and Unilever continue to lead on the scorecard on overall transparency. Unilever is the only Big 10 company to disclose its comprehensive policy on tax.
- Mars and Kellogg have improved their performance on transparency over the past year by disclosing their suppliers. Mars has also disclosed a summary of supplier audit results, and Kellogg has disclosed the countries its key commodities are sourced from. However, most of the disclosures are made anecdotally and none of the Big 10 makes a systematic, easy-to-find disclosure of their suppliers and commodities. While companies have started to give more information on where they source their ingredients, they will not improve on 'transparency' until they give greater disclosure. Doing this will increase trust and accountability with the general public and key stakeholders.

On 14 September 2013, 33 investors, representing $1.4 trillion of assets under management, signed a public letter to show support for Behind the Brands and challenged the Big 10 to take important and urgent steps to tackle the issues highlighted in the campaign, emphasizing the need for greater transparency and accountability in the sector. This collective action from the investor community, as well as individual investor engagement urging companies to take action on land rights, climate change and other issues, was an important factor in achieving change.

Figure 11: Overall score change from 2013-2016: TRANSPARENCY



WATER

What is the issue?

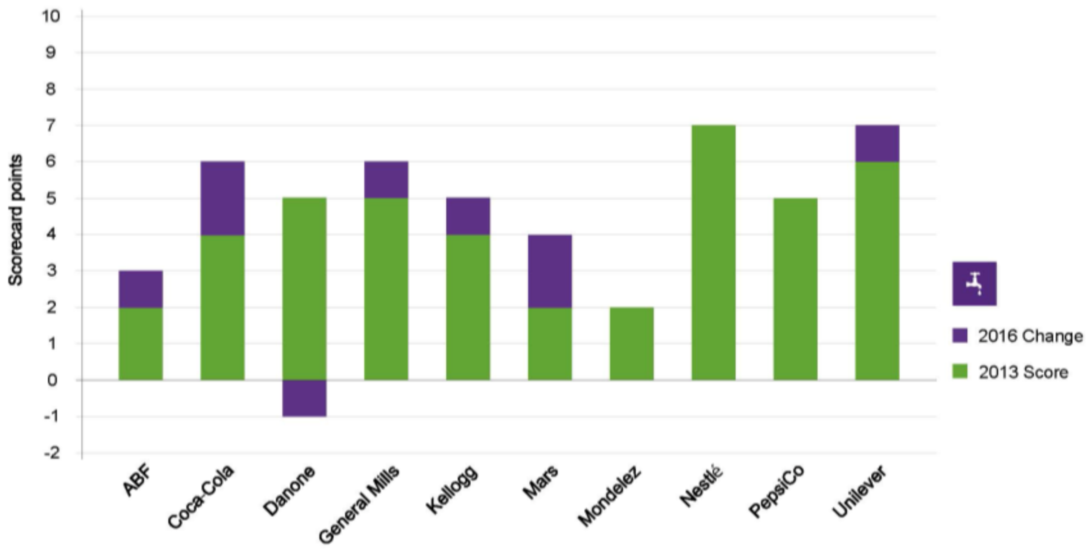
Most of the Big 10 have recognized that water scarcity is one of the greatest challenges of our time and critical for successful businesses. However, they have yet to set new commitments with targets to reduce water use along their supply chains that will ensure a more water-secure world for generations to come.

What has changed since 2013, and what's next?

- In 2013, seven companies publicly disclosed through CDPs Water Program. By 2015, all ten were disclosing key elements of their water management through CDP.[14]
- Seven companies now disclose operations in water-stressed areas, and some leading companies disclose raw materials sourced from water-stressed areas.
- In 2013, only PepsiCo declared responsibility for the human right to water. By 2016, General Mills, Unilever, Kellogg and Nestlé all made or strengthened their commitments to respect the human right to water.
- Companies' overall water scores have only increased by less than one point overall in three years, from an average 4.2 to 4.9 out of ten.

Despite some encouraging moves, the Big 10's approach to water needs to improve if it is to address the scale of increasing water scarcity. Companies have yet to show how they are going to move from policy commitments to practice in respecting the human right to water. This would require, among other actions, the implementation of grievance mechanisms and ongoing engagement with affected stakeholders.

Figure 12: Overall score change 2013–2016: WATER



KEY TAKEAWAYS

The Behind the Brands scorecard has proven to be a powerful tool for Oxfam's engagement with companies, investors, allies and the public to drive sustainability in the food sector. Over the past three years, companies have made the most progress on issues concerning gender equality, land rights and climate change. This is due in part to company-targeted Behind the Brands campaigns, as well as growing consumer activism, and ongoing efforts by partners and allies.

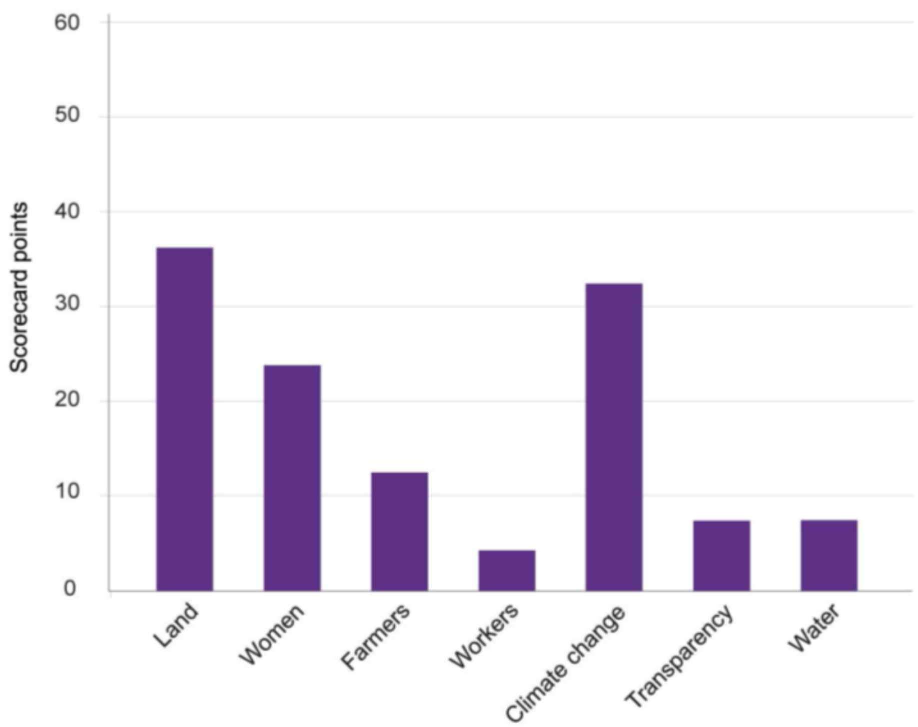
'The campaign put an unprecedented pressure to food and drink multinationals, and Oxfam turned the screw further with reports showing that even the more progressive-minded companies have failed to use their enormous power to create a more just system for farmers and local communities'[15]

Jo Confino, *The Guardian* (2014)

Lessons learned

- Consumers care about how companies do business and will take actions that help drive sector-wide policy changes on key sustainability issues.
- Case studies are effective in demonstrating why companies need to change their policies and practice, by linking the real lives of farm workers and farmers living in poverty to the actions of their suppliers.
- Allied investors can help to put pressure on companies to address key issues like climate change and land rights. Investors also share Oxfam's interest in promoting greater transparency and public company reporting.

Figure 13: Overall score changes per theme 2013–2016



'As part of the rigorous value chain analysis of our human rights impacts that we undertake, land rights had surfaced as one of the risks. However, it was through Oxfam's Behind the Brands campaign on land rights and sugar, in which we gained a greater understanding of the issue and risks.'[16]

Ed Potter, Former Director of Global Workplace Rights, The Coca-Cola Company

Box 2: A continuing demand for justice in Cambodia[17]

In 2006, hundreds of families in Cambodia's Sre Ambel district in Koh Kong province were evicted to make way for a huge sugar plantation. Without formal title to their land – a reality for poor farmers in many developing countries – Sre Ambel's villagers faced an uphill battle to secure a just solution that would provide the means to support their families.

As Sok Phoeurn, a widow from the Sre Ambel district, told us 'I feel so sad, but I am still struggling to fight to get my land back. Even though I have no money and struggle with my daily needs, I try my best to get my land back.' Local organizations, including the Community Legal Education Center (CLEC), have been supporting people like Sok Phoeurn in their struggle for justice for many years.

Oxfam brought the conflict to the attention of Behind the Brands companies in 2013. Coca-Cola, which is linked to the conflict through its sugar supply chain, visited affected communities shortly after committing to zero tolerance for land grabs. Since then, Coca-Cola has been encouraging its suppliers to resolve the conflict and to help communities receive the remedy they seek.[18] But land conflicts are complicated, involving not just sugar plantations, but governments as well. Oxfam has been optimistic about recent movement on the case in Sre Ambel, but major hurdles remain.

Ultimately, solutions in Sre Ambel will be driven by community leaders like Sok Phoeurn, by Khon Kaen Sugar Industry (the company most directly involved), and by the Cambodian government. Oxfam has and will continue to support the ongoing effort of local partners, allies, legal experts, and others to seek a just resolution. Coca-Cola will play a critical role in providing incentives for its suppliers to be part of the solution. Oxfam will be watching Coca-Cola closely to ensure that it continues to engage its suppliers meaningfully.

3 INDUSTRY TRENDS

The Behind the Brands campaign has helped to reinforce a number of changes taking place across the private sector. These trends offer further evidence of shifts underway towards a fairer and more sustainable food system.

Private sector responsibilities on human rights are increasingly recognized

In 2011, the United Nations agreed a set of guiding principles (UNGPs) on business and human rights that has become widely accepted as the global framework for business standards.[19] Under these principles, companies are required to undertake 'due diligence' to ensure they do not violate human rights and mitigate any adverse impacts, including within their supply chains.

Unilever's 2015 human rights report was the first of its kind to comprehensively follow the UN Guiding Principles Reporting Framework. Coca Cola, Unilever and Nestlé have publicly supported UNGPs and invested in policies that align with them. These actions send important signals to governments and industry peers about their responsibilities to protect and respect the rights of citizens, but much more needs to be done.

The demand for transparency is growing

The Behind the Brands campaign has focused strongly on rewarding disclosure and transparency, and has shown how the demand for sustainability disclosure is growing and important, particularly among investors. The industry as a whole has been slow to commit to full transparency, making it more difficult to assess sustainability and social responsibility. The risk is that this sends a signal to the public that companies have something to hide in their agricultural supply chains.

Today, the demand for transparency is coming from all directions. New technologies and improved reporting standards, for instance, mean that it is much easier for companies to track and report issues across their supply chains. The United Nations has set global frameworks and initiatives around reporting and transparency which target specific commodities or themes. It is important for companies to engage in these multi-sector transparency initiatives; however, many of these assessments still do not require full disclosure and they are still not enough for a company to claim that it is fully transparent. Companies themselves need to push for deeper transparency.

Consumer demand for sustainable food is growing

Digital technology allows for greater company transparency and new ways for consumers to connect with food companies. According to Gartner, one of the world's leading technology research companies, by 2020, 25 billion devices will be generating data about almost every topic imaginable.[20] This means it is getting easier and easier for consumers to access information about their favourite brands, to share this information and to collectively engage with companies.

Sustainable consumption is starting to enter the mainstream and increasingly forms part of consumer decision making and their dialogue with brands.[21] There is growing evidence that consumers want companies to operate in more socially and environmentally sustainable ways. Evidence in support of alternatives can also be witnessed in the growth of emerging food movements in support of alternative food supply strategies. Consumers are starting to engage with the social and environmental impacts of their consumption choices, and some are starting to reject the current food system in favour of food economies which are both environmentally and socially more sustainable (reducing the distance to producers, seeking a fairer distribution of value in supply chains and which rely on food quality and diversity).

A clearer business case for economically resilient agricultural supply chains

Business leaders are seeing the value in addressing and investing in sustainability and social responsibility to build a better agricultural supply chain. But there are still many instances where a company will not make more money by addressing such issues as land rights, farmer incomes, living wages, women's empowerment or agricultural greenhouse gas emissions, at least in the short term. As one senior executive responded when challenged about whether the price they pay for their milk allows for a living income for dairy farmers: 'if we unilaterally decide to pay more for our milk, we end up with less profits to invest into our marketing, eventually losing market share and eventually losing to companies who aren't willing to pay higher prices for their milk'.[22]

Companies with patient investors can spot and capitalize on opportunities both to pursue financial interests and also the interests of people on the farms in their supply chains. Unilever's move to ban quarterly reporting, for instance, has played an important role in promoting a longer term perspective with its investors.[24] The movement to help companies understand and capture this longer term perspective in order to align business and social interests is strengthening. The message that there doesn't have to be a trade-off is growing stronger, as demonstrated by senior managers in companies like General Mills. [25]

'[Sustainability is] not only something our consumers and customers support, it's also good for business,'

Jerry Lynch, chief sustainability officer at General Mills.[23]

Enthusiasm to find the business case is welcome and can help to drive change in the sector, but other approaches can be equally important and effective. For example, sector-wide, pre-competitive collaboration can ensure that the leaders are not undercut by companies slow to move in the drive towards a just and sustainable food system. However, there is at times no substitute for government regulation to protect the rights and interests of workers, farmers, communities and the environment more broadly. Regulation creates an even playing field for business, where more progressive companies are not disadvantaged.

The shared responsibility of actors is increasingly recognized

Companies operate in a complex and multi-layered food system, where a single player is rarely positioned to shift the entire system. In order to address complex supply chain issues such as water scarcity, human rights and sustainable sourcing of key commodities, collaboration between companies is essential. Leading businesses recognize that they cannot tackle these sustainability issues alone and are exploring collaborative approaches to understand and address these challenges.

In order to make an impact, companies, stakeholders and communities must work collectively to create systemic change. In some countries, farmer wages are set by the sector so individual farms all pay the same level of wages. In Malawi for instance, key actors in the tea sector are working together to achieve a competitive and profitable Malawian tea industry where workers earn a living wage and smallholders earn a living income.[26] The initiative also aims to improve working and living conditions of tea estate workers and remove barriers to collective bargaining, taking into account the different situation of male and female workers[27]

Some companies are finding their voice in promoting progressive policies

Protecting land and labour rights or sustainably managing water resources is only possible when governments play a key role. If a company is serious about being a fair and sustainable business, it will support regulation by governments to ensure that all companies meet minimum social sustainability standards.

Governments can be held back by the perception that regulation could drive away trade and investment. Progressive companies can play an important role in making clear that they support government action to level the playing field and create certainty, and some are beginning to do this.

Private sector voices were markedly louder, for example, in the debates ahead of the COP21 climate conference in Paris in 2015 than had been the case before the Copenhagen meeting in 2009, helping to open political space for an agreement to be reached. Some Big 10 companies publicly supported ambitious policies to tackle climate change, including through the We Mean Business coalition.[28] The chief executives of Mars, General Mills, Kellogg, Unilever, and Nestlé USA, alongside other companies, called for an ambitious Paris deal via a public Food Chain Declaration.[29] Vocal CEOs, such as Paul Polman of Unilever, are pioneering the role of public advocate for progressive government policies in support of sustainability.

4 FROM INCREMENTAL STEPS TO TRANSFORMATIONAL CHANGE

All of these trends indicate that change is underway, although far from fast enough for millions of small-scale food producers and their communities. To move from incremental steps to systemic transformation, companies must look beyond action on an issue-by-issue basis, and support broader shifts in the following areas.

The race-to-the-bottom on public governance to attract investment must be challenged

Government plays a crucial role in ensuring that civil and human rights are protected, natural resources are managed and sustainable markets function in the interests of society. However, we often see a race-to-the-bottom between countries, fuelled by a belief that to attract investment and trade, governments must keep prices, wages and conditions as low as possible.

Companies are in the unique position to dispute this theory, as they did when making the economic case for action on climate change ahead of the Paris conference in 2015. Such collaboration by business in undermining the misguided economic arguments preventing progressive policies can be critical in achieving public policy changes.

This must start with changing the stance of existing and powerful business associations which too often support the argument that business wants a race-to-the-bottom.

Power and market concentration must be broken

Power determines who has leverage in the global food system and who doesn't have a voice. Unfortunately, the disparities in power are getting worse, as summarized by Olivier De Schutter, UN Special Rapporteur on the Right to Food (2008–14): 'The shifts in power in the agrifood sector have now become too significant, and their impacts too considerable, to be ignored... commodity buyers are larger and more concentrated than previously'.[30]

From processors to retailers, multinational companies are increasingly growing their power within the supply chain. This makes it harder for smaller ones to secure contracts.[31] According to De Schutter, for small-scale farmers there are two options in addressing this power disparity: first, the use of competition law to break the power of the growing giants of the food system; and second, to help small-scale farmers organize to have greater bargaining power and to 'invest into collective goods – from storage facilities to small-scale processing plants – to allow them to capture a larger proportion of the value'.

Box 3: How power disparities play out in sugar[32]

Cane sugar produced by local farmers is processed by mills located close to the growing areas. There is unlikely to be more than one mill in a given area. As a result, small-scale farmers have little choice but to sell to this one mill, resulting in a strong asymmetry of power. The sugar mill usually enters into contracts with local small-scale farmers, providing credit, extension support and social services (such as schools and health clinics) as part of the agreement to buy the sugar cane.

Small-scale sugarcane farmers become dependent on the mill, with little choice but to accept the terms of trade offered. Their dependence is worsened by the fact that they need to sell their product very quickly once harvested before it loses its sucrose content. The large companies which own the mills negotiate prices and terms over time so as to capture as much of the value as possible. Today, mills capture 25 percent of the value in cane sugar, whereas farmers receive 15 percent.

Successful business models that give small-scale producers greater power and ownership in processing do exist and continue to evolve. But there is still a long way to go in redistributing power and value into the hands of farmers, workers and agricultural communities.

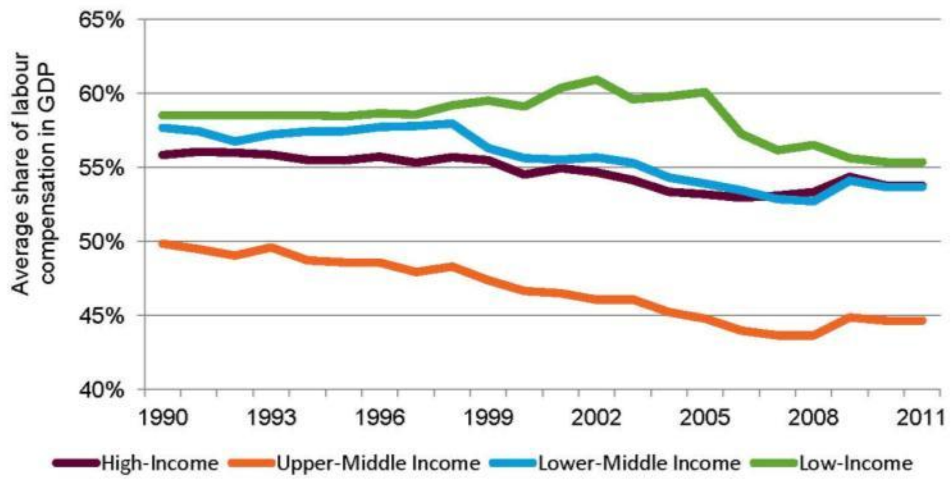
The share of value captured by farmers and workers must be radically increased

This shift of power away from farmers and their communities means that farmers are unable to capture a fair share of value in the supply chain.

In the global cocoa value chain, only eight traders and grinders control around 75 percent of the global trade in cocoa.[33] Only two companies, Barry Callebaut and Cargill, which recently merged with ADM, produce 70–80 percent of the world's high grade *couverture* chocolate;[34] yet only 3.5–6 percent of the value of a chocolate bar reaches cocoa farmers.[35] This is a sharp decline from the 1980s, where there was less market concentration in the cocoa supply chain and farmers received 18 percent of the value created in the chain.[36]

This is part of a broader economic trend in which an increasing share of the value of our global economy is going to capital, rather than labour, demonstrated in the figure below. Wages and incomes for workers and farmers are so low that millions of people remain trapped in poverty, yet the supply chains generate billions in profits.

Figure 14: Labour income as share of GDP in countries of different income levels, 1988–2011



Source: Penn World Table. R.C. Feenstra, R. Inklaar and M.P. Timmer (2015) 'The Next Generation of the Penn World Table', forthcoming, *American Economic Review*, available for download at www.ggdc.net/pwt

Poverty wages persist in the agricultural production of many food commodities, despite a growing movement for a living wage and its recognition as a human right.[37] For instance, a 2013 study found tea workers in Malawi[38] and India earning wages that met the legal minimum but were below the international poverty line, less than $2 a day.[39] Unfortunately, too many farm workers in the developing world have to accept the minimum wage because they have no bargaining power or access to alternative job opportunities. And even in areas where a minimum wage is enforced, it is often insufficient to meet people's basic needs.

These trends towards low or decreasing share of value accruing to farmers and workers are set to be exacerbated by the increasingly severe impacts of a changing climate which increases the risks and costs that are pushed down to farmers, and the potential rise of mechanization of agriculture, which may threaten the economic viability of agricultural jobs and create further downward pressure on wages. Ultimately, the situation can only improve if the prices paid and value accrued to producers for agricultural produce increases. In some cases, there is a need for a radical increase in prices, as articulated by the then Fairtrade CEO, Harriet Lamb in 2015: 'farmers need a dramatic increase in prices, at the scale of doubling of prices for cocoa at the farm gate alongside better access to credit, fairer trading conditions, support in managing risk and more investment in productivity – all so that farmers can have a living income.'[40]

A similar issue exists in relation to aggressive tax planning by companies. Rising inequality can be tackled only when companies pay taxes where they conduct business and not use tax havens for tax-avoidance purposes.

For all the talk about the concept of 'creating shared value'[41] as the business case for sustainability and responsible business, we are yet to see a food company publicly commit to pay prices for their agricultural commodities that would allow farmers to earn a living income, workers to earn a living wage and much more value channelled to farmers and workers. Despite the enthusiasm for shared value, there is still too little focus on how the value is shared. Until the economics underpinning the prevailing business model catches up with the sustainability commitments, the issues that drive the injustice in the food system will continue to fester.

New business models in supply chains must be rapidly established

The food system needs to allocate profits differently and will only be able to do so when the models of business are transformed. It is time for the Big 10 to evaluate whether the models of businesses they are supporting in their supply chains are geared to work for small-scale producers and farmers and the protection of natural resources as well as they do for the rest of the food system.

'I'm deeply convinced that our future relies on our ability to explore and invent new business models and new types of business corporations.'

Groupe Danone Chairman Franck Riboud[42]

Three examples of enterprise models in agriculture (in all of which Oxfam has played a small part) demonstrate that alternative models can be developed in which companies are incentivized not only to maximize profits but also to fulfil a broader social purpose.

Amul: owned by 3.6 million small-scale dairy farmers

Amul is now India's largest milk brand, and is jointly owned by 3.6 million of Gujarat's small-scale dairy farmers. Through Amul, dairy farmers own processing activities that allow them to capture the value created in the supply chain. Amul does not only treat small-scale producers fairly, but also channels all profits and value it captures to the people who labour to produce the milk. Amul's model is bucking the global trend that sees producers receiving less and less of the value in food chains.

Kenyan Tea Development Agency: owned by 550,000 small-scale tea farmers

The Kenyan Tea Development Agency (KTDA) has become a giant of the tea sector, and is wholly owned by 550,000 of Kenya's small-scale tea farmers.[43] Through KTDA, these small-scale farmers own 66 tea processing factories. KTDA results in Kenyan tea farmers getting over 75 percent of the final tea price – much higher than farmers in neighbouring countries (e.g. Rwanda, where they earn only 25 percent).[44]

Cafédirect: governed for the farmers, profits for the farmers

Cafédirect, founded in 1991 by Oxfam and others, is one of the success stories and pioneers of the Fair Trade movement. As a company set up for the benefit of small-scale producers in developing countries, it channels its profits back into producer communities. Farmers sit on the company's board – sharing in both profits and decision making. Cafédirect is now the fifth largest coffee brand and seventh largest tea brand in the UK.

There are other examples of businesses geared to work for farmers, workers and communities. For instance, Divine Chocolate, owned by 80,000 farmers, is on retail shelves across the UK, Scandinavia, Netherlands, Czech Republic, South Korea, Hong Kong, Japan and Australia and the USA[45]. Grameeen Danone Foods Ltd in Bangladesh, a joint venture between Grameen Bank and Groupe Danone, is a social business that is structured to prioritize the mission of promoting nutrition and alleviating poverty, with investors receiving a maximum of a one percent annual dividend, and all other profits being ploughed back into achieving the social mission.[46] Elsewhere, there are examples emerging of business models built on agro-ecological principles that can help to incentivize the shift away from input-intensive agricultural approaches and towards greater environmental protection. In the US, for example, the Community Agroecology Network (CAN), which works to advance agro-ecological systems in Central America, has launched AgroEco Coffee, which works with farmer organizations in Mexico and Nicaragua to produce the crop as part of an agro-ecological farm system.[47]

The Big 10 can be more deliberate about identifying the kind of businesses they want to become and the kinds of suppliers they want to do business with. Supporting more mission-driven business models that are owned or governed differently to today's status quo will be the key to achieving a more sustainable food system, and a better world.

5 CONCLUSION

Behind the Brands set out a framework for social sustainability in the food and beverage sector and has shown the power of consumers influencing the policies and practices of the world's most powerful companies. When their customers speak out, brands pay attention and this can result in real positive change in the lives of millions of people in global supply chains. Despite some strong progress over the past three years, the Big 10 still have to make further significant changes to effectively tackle firmly entrenched inequalities and injustices in the food system.

The Behind the Brands campaign has taught us that to achieve change in the food system, the Big 10 and their business partners in their supply chains need to transform the dominant models of business that dictate how food is produced, traded and processed. This needs to result in more power and more economic value shifting to farmers, workers and communities, away from the increasingly concentrated corporate actors in global supply chains.

A renewed commitment to change is needed from a multitude of players across the food system.

- **The Big 10** need to implement their commitments throughout their supply chains: prioritizing suppliers owned by farmers and workers; using their power to influence the actions of suppliers and to speak out in favour of public policies that protect human rights, fair markets and sustainable use of natural resources.
- **Commodity traders and processors which supply the Big 10** must commit to addressing the issues covered in Behind the Brands, to support the efforts of the Big 10 and others to implement their commitments and to shape their business models so as to allow farmers and workers to capture an increased share of value.
- **Other food and beverage companies at national and global levels** need to become the champions of sustainable and equitable agriculture: collaborate with other sustainability leaders to address policy and practice shortcomings with respect to the issues covered by Behind the

Brands, and support business models that give greater value to farmers and workers.

- **Governments** must uphold their duties as articulated in the UN Guiding Principles on Business and Human Rights: to protect human rights and provide access to remedies; to set and enforce policy frameworks that manage natural resources sustainably; and favour the interests of farmers, workers and communities when they deal with companies in the food system.
- **Civil society** has a key role to play in holding companies to account for implementing their policy commitments and ensuring that these translate into sustainable practice on the ground.

The Behind the Brands campaign has challenged the world's ten largest food and beverage companies to make bold commitments to make their supply chains fairer and more socially sustainable, particularly in relation to land rights, gender justice and climate change. Ultimately, what is needed is a transformation of the business models in global agricultural supply chains. This will take more than good will from the Big 10; it will require movement from actors, big and small, across the food system. Oxfam remains committed to ongoing engagement with the Big 10, and their suppliers, to support and ensure the effective implementation of new policy commitments. In doing so, we will judge our success on whether power is shifting to farmers, workers, communities and women.

This is essential for a future without hunger and poverty, where the planet can feed the world.

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