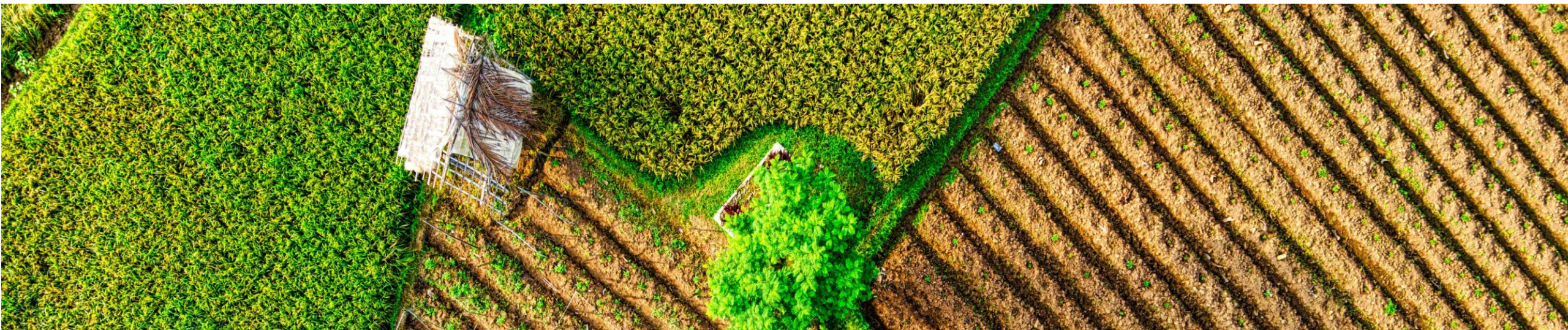


Harvesting Sustainability Event

Presentation of the “Beyond Food Study”

16th November 2023



Objectives of the study

Support the definition of a Beyond Food's strategy:

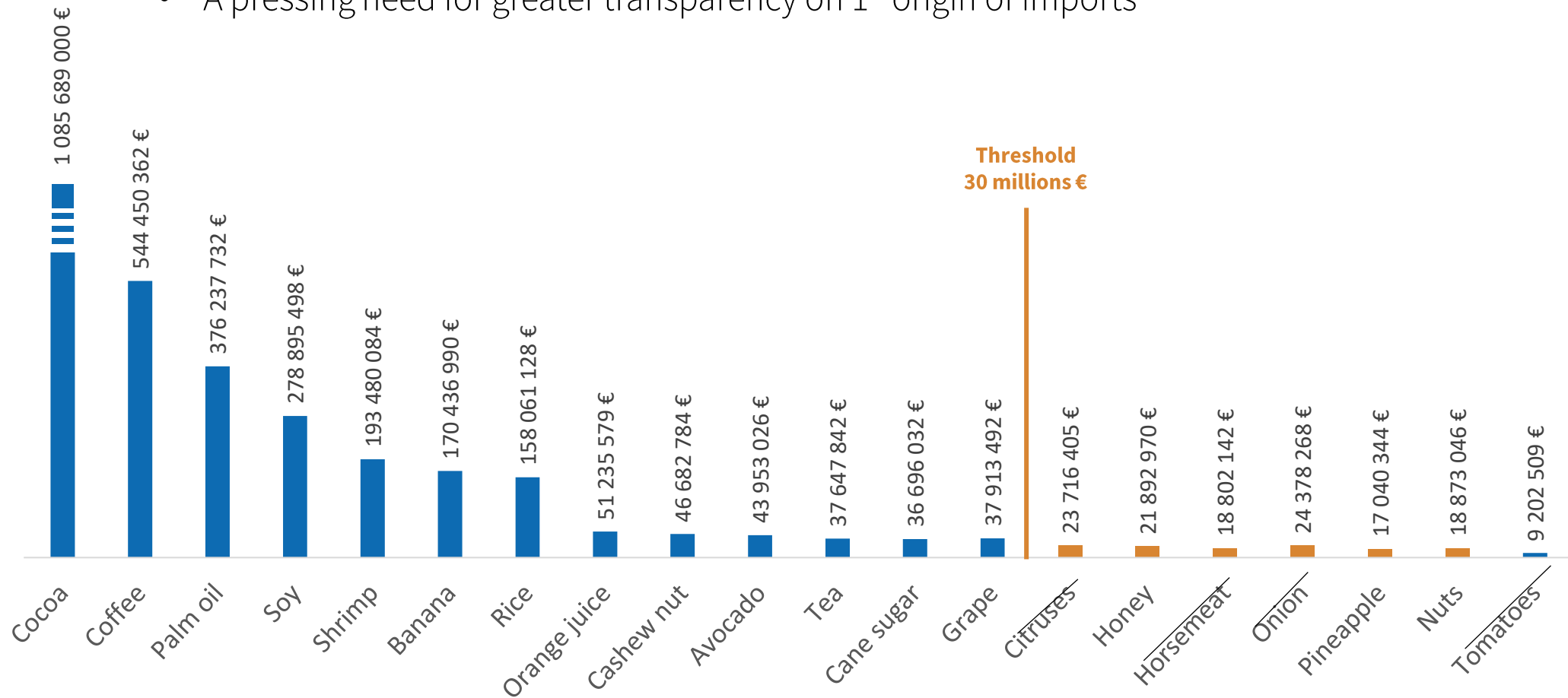
- Through an in-depth **assessment of social and environmental sustainability levels** of Belgian import agri-food supply chains,
- in order **to prioritise the value chains** for which new ecological and social transition trajectories should be put in place.



List of analysed supply chains & main sustainability issues

Identifying the main value chains of agri-food products imported into Belgium from the Global South

- An intensive work of data consolidation and modelling required to trace flows of goods & money
- A pressing need for greater transparency on 1st origin of imports

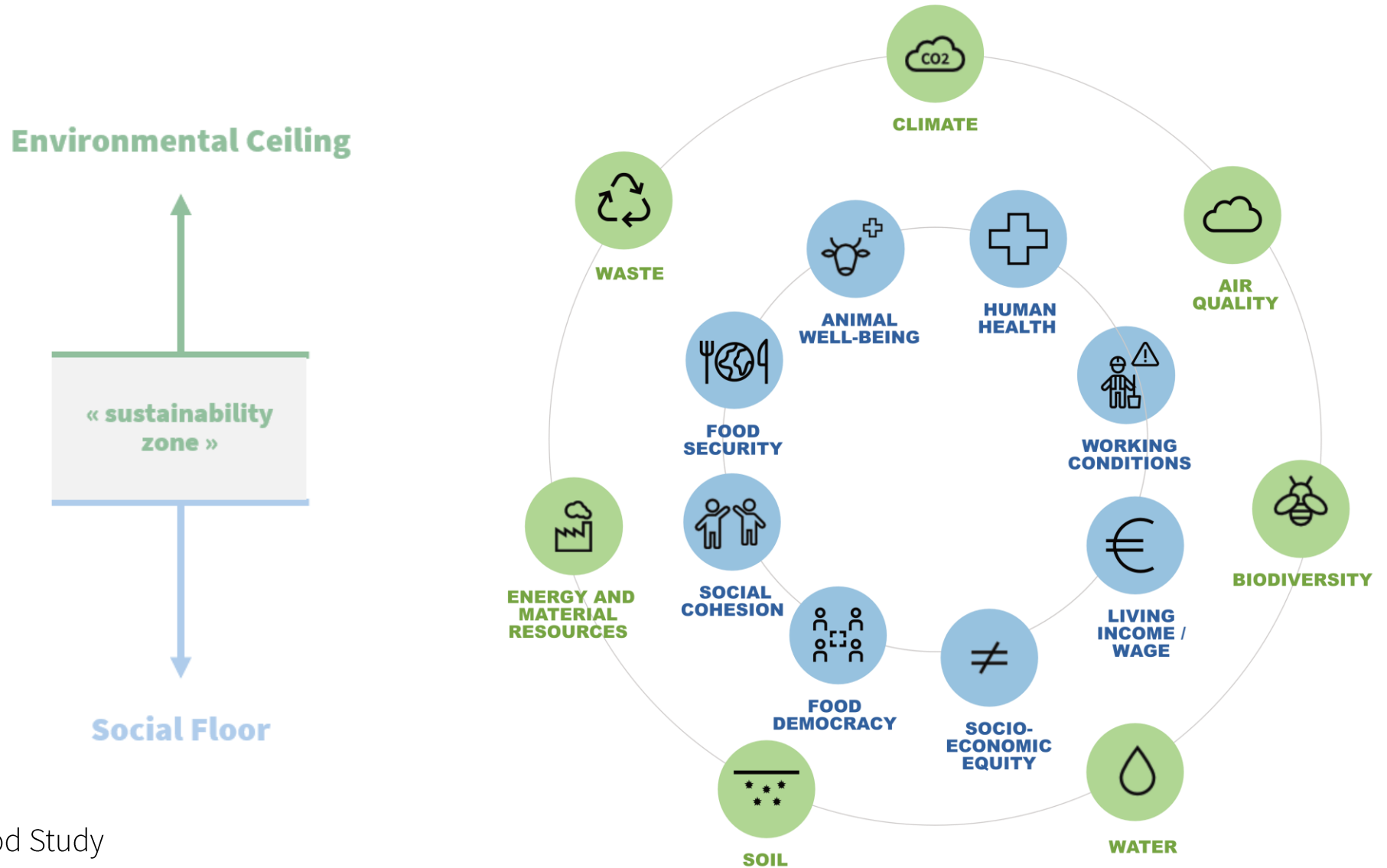


Identifying the main value chains of agri-food products imported into Belgium from the Global South

Main countries	Total value (€)	Products
Côte d'Ivoire	511 103 252,93	Cocoa
Brazil	358 709 848,75	Coffee, Soya, Cashew, Orange Juice, Avocado, Cane Sugar, Pineapple
Vietnam	153 084 440,54	Coffee, Shrimps, Cashew
Ghana	148 400 753,66	Cocoa
India	123 786 654,02	Soya, Shrimps, Tea, Cane Sugar, Grapes
Indonesia	116 623 958,47	Palm Oil, Soya, Shrimps, Cashew
Nigeria	112 353 028,30	Cocoa
Malaysia	101 686 902,15	Palm Oil
Colombia	94 891 107,06	Coffee, Palm Oil, Banana, Avocado, Cane Sugar
Ecuador	78 944 781,58	Cocoa, Shrimps, Banana, Pineapple

Other countries: Honduras, Pakistan, Papua New Guinea, Argentina, Bangladesh, Chile, Thailand, Burma, Costa Rica, Turkey, China, Cambodia, South Africa, Peru, Ukraine, Sri Lanka, Guyana, Mauritius, Togo, Kenya, Malawi, Guatemala, Mexico, Benin, Dominican Republic, Egypt, Morocco

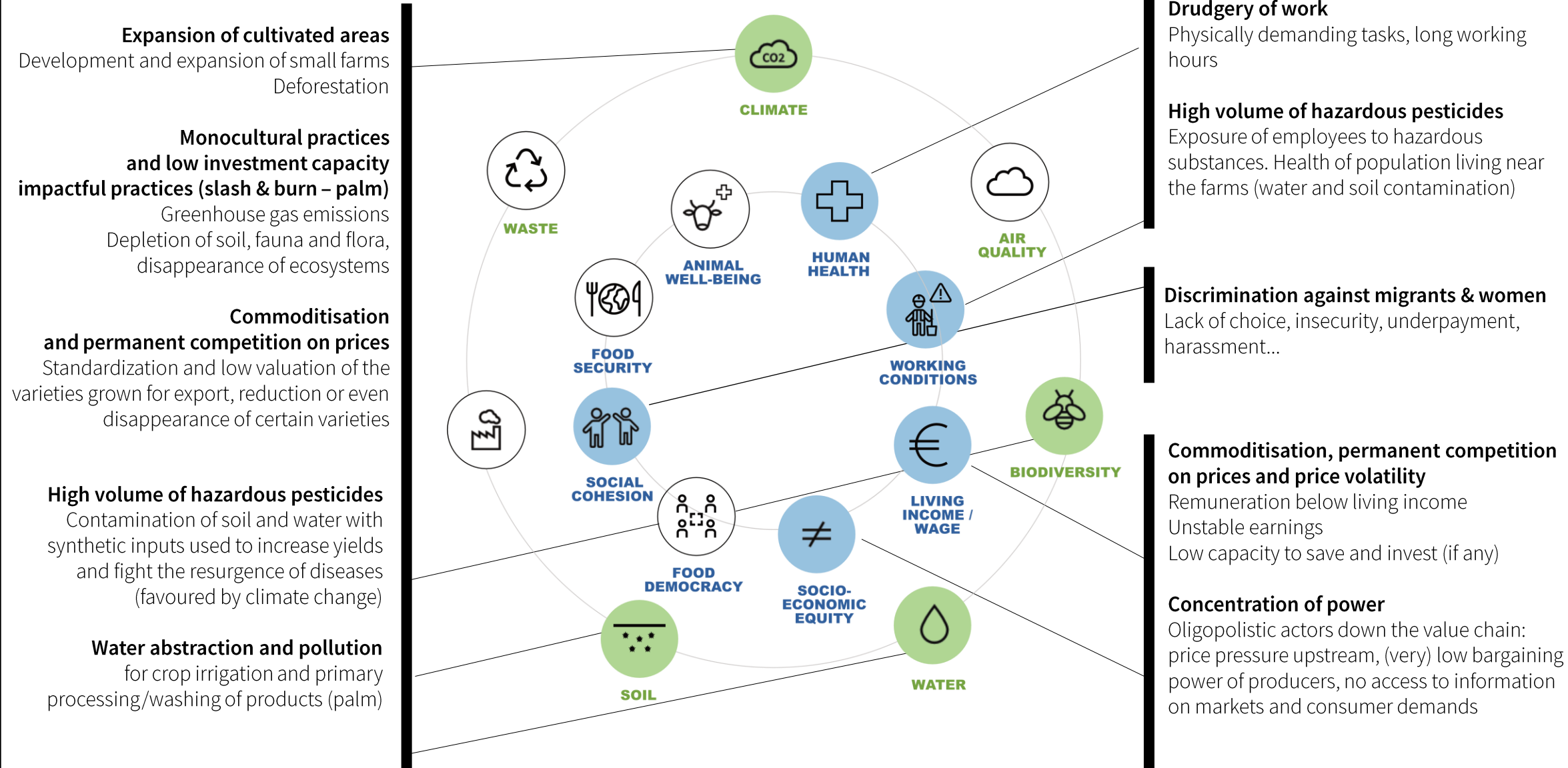
Identifying the social & environmental impacts : the “sustainability compass” based on the donut concept



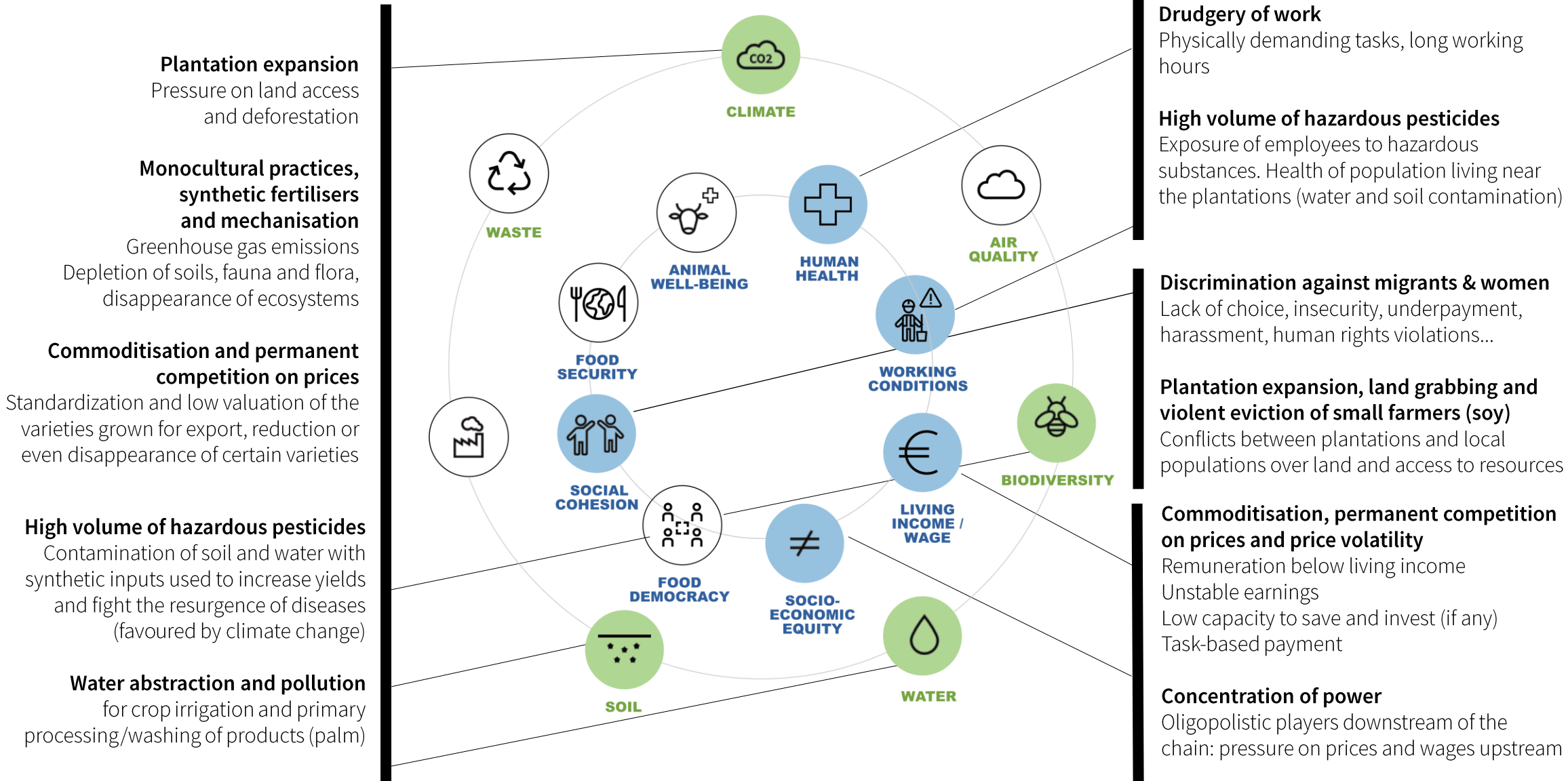
Which impacts can be quantified across the products?

Issue	Environmental				Socio-Economic		
	Climate	Biodiversity	Water		Working conditions/rights		Decent living
Indicator	Total GHG Emissions belgian imports	Deforested Ha belgian imports	Total Blue Water belgian imports	Total Grey Water belgian imports	Nb countries belgian imports with child labour	Nb countries belgian imports with forced labour	Living Income/Wage gap in countries belgian imports
Cocoa	3 986 539 165 666	280 297	932 329 396	41 721 740 480	3	2	53%
Coffee	1 139 498 051 501	230 284	14 061 890 848	64 490 740 787	3	1	49%
Palm Oil	2 690 977 153 192	5 290 759	0	19 255 650 470	2	2	81%
Soy	3 152 389 958 912	3 790 996	56 726 811 600	29 984 171 846	NA	NA	43%
Shrimps	161 781 727 056		NA	NA	1	0	80%
Banana	225 822 243 289	18 053	11 713 774 117	3 985 098 411	1	0	89%
Rice	587 739 585 765	244 156	92 786 666 086	50 883 010 434	1	0	49%
Orange Juice	64 167 208 225	21 600	14 188 082 708	6 416 720 823	NA	NA	56%
Cashew Nuts	41 109 712 239	61 663	4 480 715 381	2 160 084 288	2	0	N/A
Avocado	39 577 790 296	9 185	4 072 914 420	12 218 743 259	NA	NA	91%
Tea	282 079 627	11 168	5 066 150 094	4 095 796 178	2	1	44%
Sugarcane	126 337 801 743	189 952	49 985 825 907	11 425 331 636	4	1	36%
Grapes	11 232 777 152	1 553	1 729 491 085	1 551 193 035	0	0	53%
Pineapple	12 250 724 515	15 919	95 875 235	330 236 922	1	0	74%
Hazelnuts	10 943 591 463	1 275	858 987 002	2 644 903 480	1	0	51%

Beyond quantification: the **Sustainability Compass and root causes** of Belgian import chains of agri-food products: the case of **small producers**



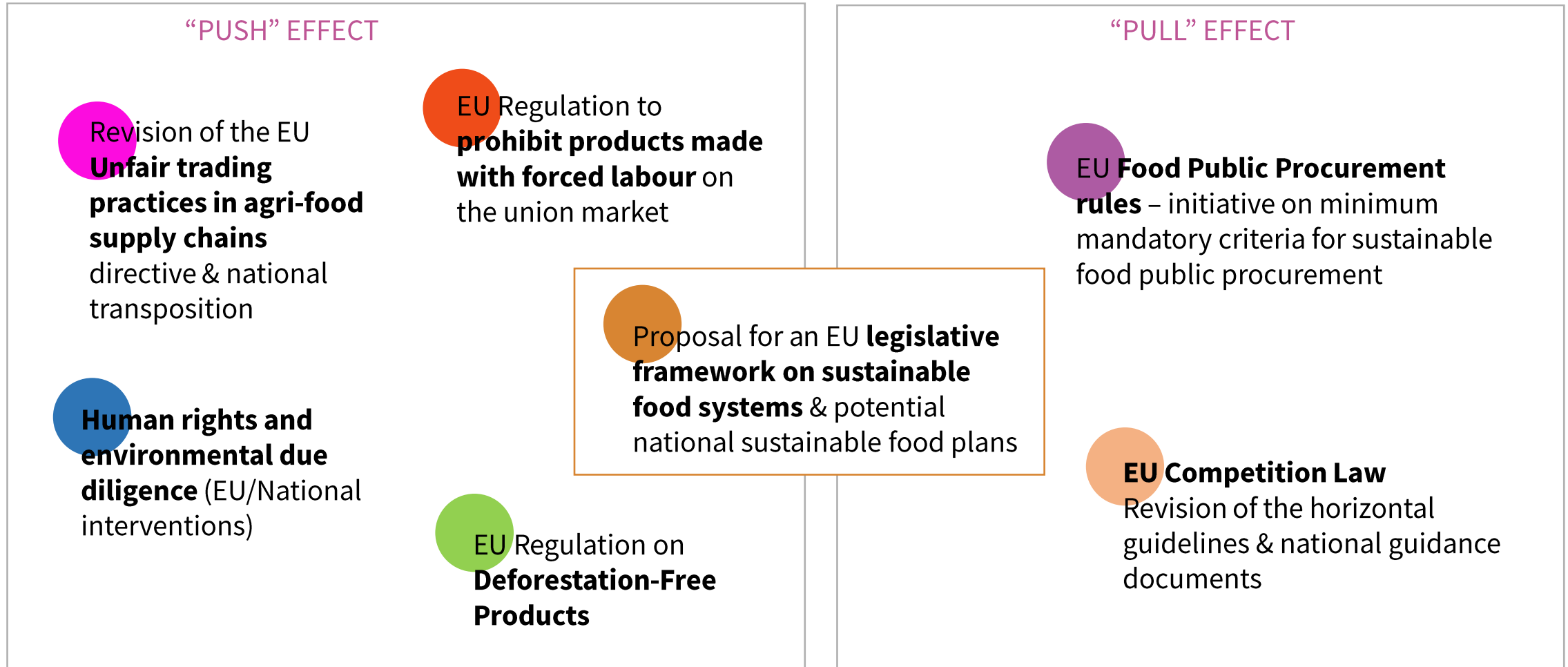
Beyond quantification: the **Sustainability Compass and root causes** of Belgian import chains of agri-food products: the case of **plantations**



A hand is shown holding a small green plant with several leaves. The background is a soft-focus scene of sunlight filtering through green foliage, creating a bokeh effect. The overall tone is warm and natural.

Analysis of regulatory & voluntary interventions

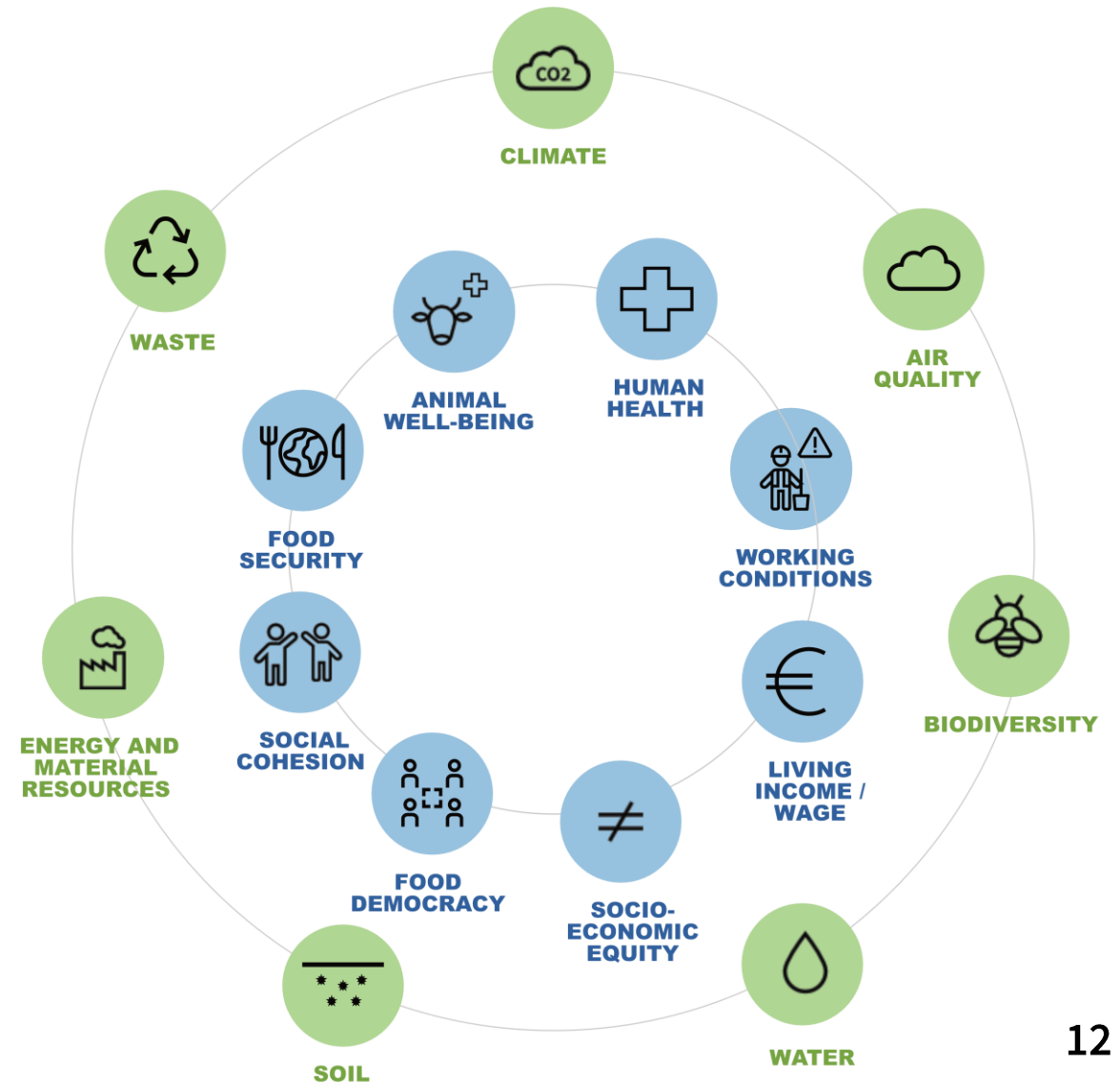
Identifying the interventions : the example of regulatory interventions at EU level



Analysing the EU regulatory interventions' capacity for change

- Deforestation-Free Products
- Due diligence
- Prohibition of products linked to forced labour
- EU Food Public Procurement rules
- Sustainable food systems framework
- EU Competition Law guidelines
- Unfair trading practices

What influence on the **root causes** of the sustainability compass?



Analysing the EU regulatory interventions' capacity for change

Regulations \ Root causes	Farmland expansion	Mono-culture	Synthetic fertilizers	Mechanization	Hazardous pesticides	Water extraction	Ability to invest small farmers	Labour rights violations	Precarious employment	Occupational health & safety	Discrimination	Commoditization / Low prices	Price volatility	Asymmetry of power
EU Food Public Procurement rules	2	2	2	2	2	2	2	2	2	2	2	2	2	0
Sustainable food systems framework	2	2	2	0	2	1	2	1	2	1	0	1	2	0
Due Diligence (CSDDD)	1	0	2	0	2	1	2	2	1	2	2	1	1	0
Unfair trading practices	0	0	1	0	1	0	2	2	2	0	1	2	0	2
EU competition law guidelines	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Deforestation-Free Products	3	1	0	0	0	1	2	1	0	0	1	2	1	1
Sustainable commercial policy	2	0	2	0	2	0	1	1	0	1	0	1	0	0
Prohibition of products linked to forced labour	0	0	0	0	0	0	0	3	2	2	1	0	0	1

Potential impact of EU regulatory interventions

0	No mention or intention of impact
1	Potential impact, but no target
2	Problem analysed, target specified
3	Issue at the centre of the intervention

Analysing the capacity for change on each value chain (based on EU + Belgian public interventions & MSIs)

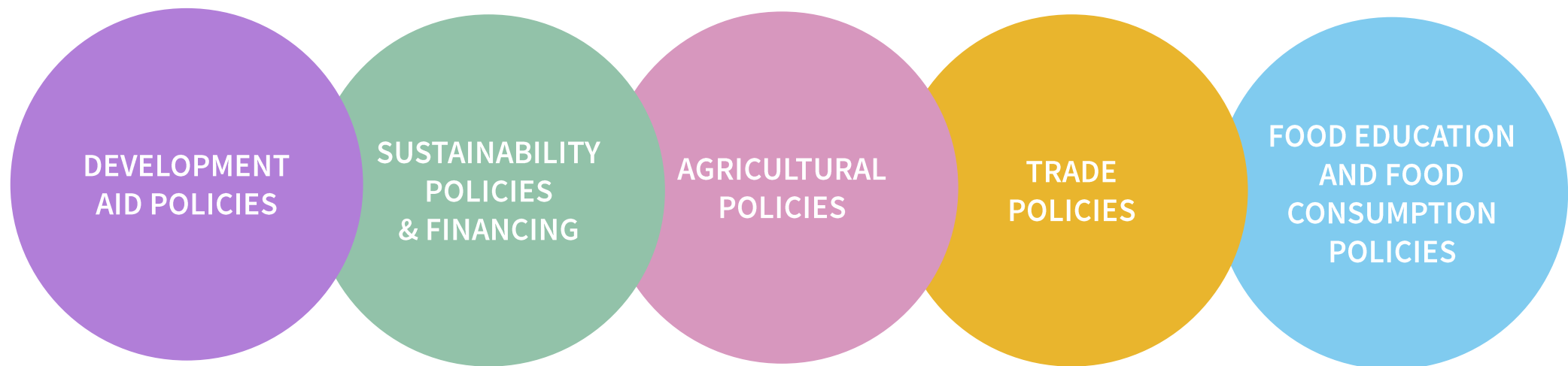
Value chain	Farmland expansion	Mono-culture	Synthetic fertilizers	Mechanization	Hazardous pesticides	Water extraction	Ability to invest small farmers	Labour rights violations	Precarious employment	Occupational health & safety	Discrimination	Commoditization / Low prices	Price volatility	Asymmetry of power
Cocoa	3	1	2	1	2	2	2	2	2	2	2	2	1	1
Coffee	3	1	2	1	2	2	2	2	2	2	2	2	1	1
Palm Oil	3	1	2	1	2	1	2	1	1	2	2	2	1	1
Soy	3	1	2	1	2	1	1	2	2	2	2	2	1	1
Tea	2	1	2	1	2	2	2	2	2	2	2	2	1	1
Rice	2	1	2	1	2	2	2	2	2	2	2	2	1	1
Banana	2	1	2	1	2	1	2	2	2	2	2	2	0	1
Cane Sugar	2	1	2	1	2	2	2	2	2	2	2	2	0	1
Pineapple	2	1	2	1	2	2	2	2	2	2	2	2	0	1
Cashew Nut	2	1	2	1	2	2	2	2	2	2	1	2	0	1
Orange Juice	2	1	2	1	2	2	2	2	2	2	1	2	0	1
Avocado	2	1	2	1	2	2	2	2	2	2	1	2	0	1
Grapes	2	1	2	1	2	2	2	2	2	2	1	2	0	1
Hazelnuts	1	1	1	1	1	1	1	1	1	2	1	2	0	1
Shrimps	1	1	1	1	1	1	1	1	1	2	1	2	0	1

CAPACITY FOR CHANGE

- 0 Lack of specific leverage, public or private
- 1 At least one instrument (public or private)
- 2 Public and private instrument can be used, but public intervention is not product-specific
- 3 Public and private instrument can be used, and public intervention is product-specific

Transversal analysis: the need for a systemic approach

- Overcome the silo approach of environmental and social issues and **address instead all dimensions of the sustainability compass** instead of focusing on specific issues (climate, biodiversity, child labour)
- Adopt a **systemic approach** that addresses the root causes of environmental and social issues instead of their symptoms
- Strengthen **public policy coherence** to create an enabling environment for the ecological and social transition



The need for articulating public regulations and multi-stakeholder initiatives (MSIs)

Public regulations have a strategic role to play which is maximized when they are designed in articulation with MSIs

Create a levelled playing field and a fair competition environment

Create mechanisms of individual responsibility combined with effective sanction regimes

Ensure a transparent and consistent application of rules in time and space and provide visibility on the evolution of rule

- A favourable legislative environment is a precondition for enabling voluntary interventions to develop their full potential

Some challenges faced by MSIs to create impact that can meet the environmental & social problems

- How to develop an **effective role for public authorities** in connection with MSIs?
- How to create an **effective normative framework** that builds on ground experiments to **resolve the root causes** of sustainability challenges (standards, criteria...)?
- How to **sanction** or exclude actors in case of violation of this normative framework in order to safeguard the credibility of the initiative?
- How to integrate **representatives from producing countries**: producer organisations, trade unions, civil society organisations...?
- How to organise **informed and objective discussions on value distribution** in articulation with debates on environmental and social issues?

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THANK YOU FOR YOUR ATTENTION!