





Harvesting Sustainability Event

Presentation of the "Beyond Food Study"

16th November 2023



Objectives of the study

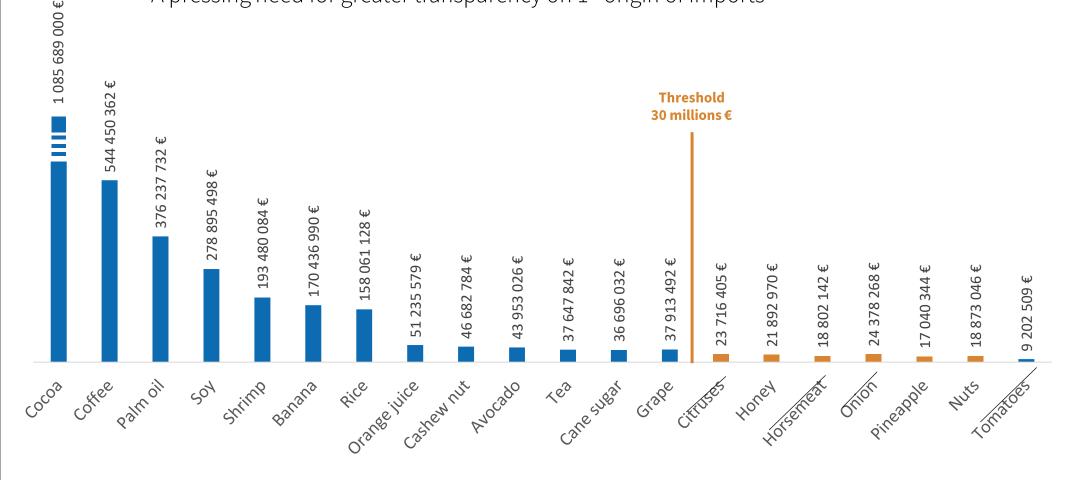
Support the definition of a Beyond Food's strategy:

- 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.



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?

		Environn	nental	Socio-Economic					
Issue	Climate	Biodiversity	Wa	ter	Working cor	Decent living			
	Total GHG	Deforested Ha	Total Blue	Total Grey	Nb countries	Nb countries	Living Income/Wage		
Indicator	Emissions belgian	belgian	Water belgian	Water belgian	belgian imports	belgian imports	gap in countries		
	imports	imports	imports	imports	with child labour	with forced labour	belgian imports		
Сосоа	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

Expansion of cultivated areas

Development and expansion of small farms

Deforestation

Monocultural practices and low investment capacity impactful practices (slash & burn – palm)

Greenhouse gas emissions Depletion of soil, fauna and flora, disappearance of ecosystems

Commoditisation and permanent competition on prices

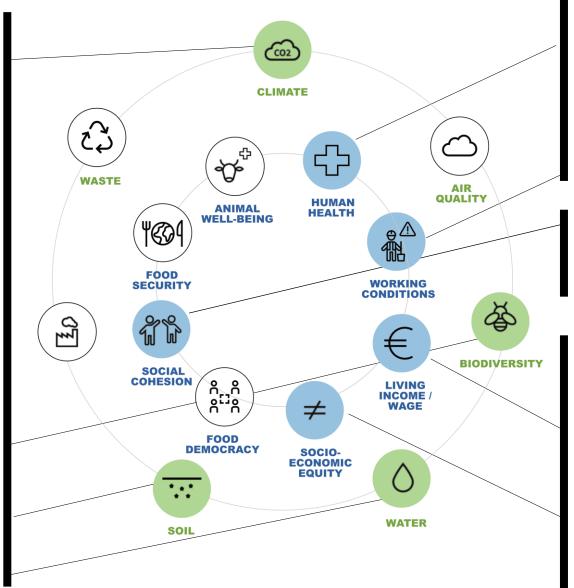
Standardization and low valuation of the varieties grown for export, reduction or even disappearance of certain varieties

High volume of hazardous pesticides

Contamination of soil and water with synthetic inputs used to increase yields and fight the resurgence of diseases (favoured by climate change)

Water abstraction and pollution

for crop irrigation and primary processing/washing of products (palm)



Weak organisation of producers, weak enforcement of labour laws Child labour (palm)

Drudgery of work

Physically demanding tasks, long working hours

High volume of hazardous pesticides

Exposure of employees to hazardous substances. Health of population living near the farms (water and soil contamination)

Discrimination against migrants & women

Lack of choice, insecurity, underpayment, harassment...

Commoditisation, permanent competition on prices and price volatility

Remuneration below living income Unstable earnings Low capacity to save and invest (if any)

Concentration of power

Oligopolistic actors down the value chain: price pressure upstream, (very) low bargaining power of producers, no access to information on markets and consumer demands

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

Plantation expansion

Pressure on land access and deforestation

Monocultural practices, synthetic fertilisers and mechanisation

Greenhouse gas emissions Depletion of soils, fauna and flora, disappearance of ecosystems

Commoditisation and permanent competition on prices

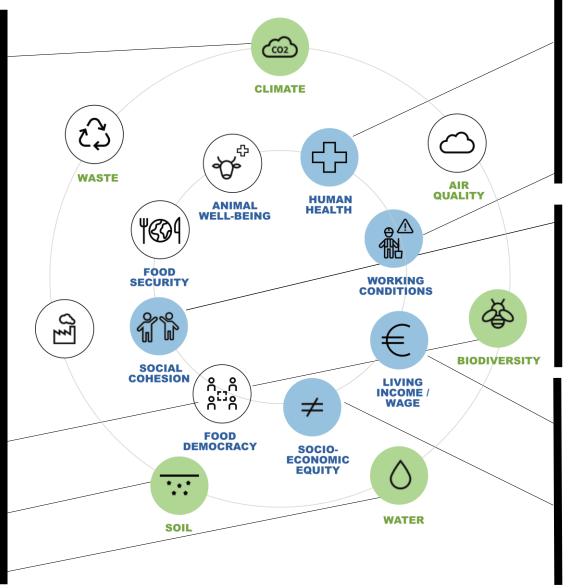
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Water abstraction and pollution

for crop irrigation and primary processing/washing of products (palm)



Violations of trade union rights and trade union repression

Precarious contracts, weak enforcement of labour law, child & forced labour (palm)

Drudgery of work

Physically demanding tasks, long working hours

High volume of hazardous pesticides

Exposure of employees to hazardous substances. Health of population living near the plantations (water and soil contamination)

Discrimination against migrants & women

Lack of choice, insecurity, underpayment, harassment, human rights violations...

Plantation expansion, land grabbing and violent eviction of small farmers (soy)

Conflicts between plantations and local populations over land and access to resources

Commoditisation, permanent competition on prices and price volatility

Remuneration below living income Unstable earnings Low capacity to save and invest (if any) Task-based payment

Concentration of power

Oligopolistic players downstream of the chain: pressure on prices and wages upstream



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

"PUSH" EFFECT

Revision of the EU
Unfair trading
practices in agri-food
supply chains
directive & national
transposition

Human rights and environmental due diligence (EU/National interventions) Prohibit products made with forced labour on the union market

Proposal for an EU legislative framework on sustainable food systems & potential national sustainable food plans

EU Regulation on Deforestation-Free Products

"PULL" EFFECT

Food Public Procurement rules – initiative on minimum

mandatory criteria for sustainable

food public procurement

EU Competition LawRevision of the horizontal guidelines & national guidance documents

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Analysing the EU regulatory interventions' capacity for change

Deforestation-Free Products

Due diligence

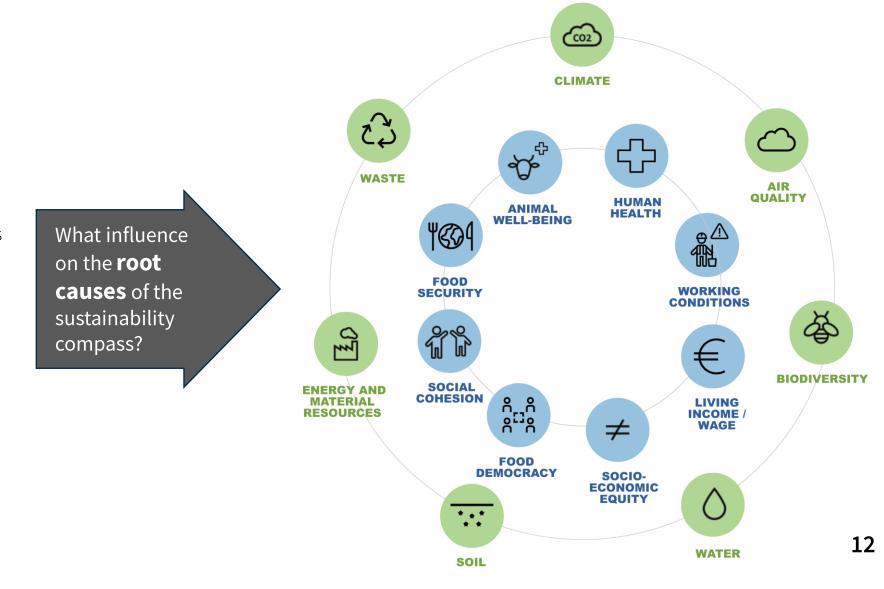
Prohibition of products linked to forced labour

EU Food Public Procurement rules

Sustainable food systems framework

EU Competition Law guidelines

Unfair trading practices



Analysing the EU regulatory interventions' capacity for change

Root causes Regulations	Farmland expansion	Mono- culture	Synthetic fertilizers	Mechani- zation	Hazardous pesticides	Water extraction	Ability to invest small farmers	Labour rights violations	Precarious employment	Occupational health & safety	Discrimi- nation	Commodi- tization / 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		1	2	1	0	0	1	2	1	1
Sutainable 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		Synthetic fertilizers	Mechani- zation	Hazardous pesticides		Ability to invest small farmers	Labour rights violations	Precarious employment	Occupational health & safety	Discrimi- nation	Commodi- tization / 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

Lack of specific leverage, public or private1 At least one instrument (public or private)

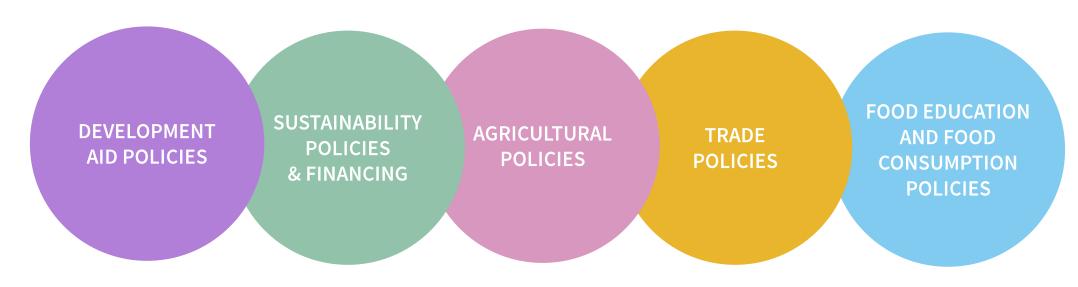
2 Public and private instrument can be used, but public intervention is not product-specific

3 Public and private instrument can be used, and public intervention is product-specific

Beyond Food Study

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 credibilty of the initiative?
- How to integrate **representatives from producing countries**: roducer 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?

Contacts

Christophe ALLIOT – christophe@lebasic.com
Maylis LABUSQUIERE – maylis@lebasic.com
Tomaso FERRANDO - tomaso.ferrando@uantwerpen.be
Charlotte VERNIER - vernier@fairtrade-advocacy.org

THANK YOU FOR YOUR ATTENION!