
# BEHIND THE BRANDS

## Food justice and the 'Big 10' food and beverage companies

**Over the past century, powerful food and beverage companies have enjoyed unprecedented commercial success. But these companies have grown prosperous while the millions who supply the land, labor and water needed for their products face increased hardship. Now, a rapidly changing environment, affected communities and an increasingly savvy consumer base are pushing the industry to rethink 'business as usual'. In this report, Oxfam assesses the social and environmental impacts of the world's ten largest food and beverage companies and calls on them to take the critical next steps to create a just food system.**

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# SUMMARY

In Pakistan, rural communities say Nestlé is bottling and selling valuable groundwater near villages that can't afford clean water.[1] In 2009, Kraft was accused of purchasing beef from Brazilian suppliers linked to cutting down trees in the Amazon rainforest in order to graze cattle.[2] And today, Coca-Cola is facing allegations of child labor in its supply chain in the Philippines.[3]

Sadly, these charges are not anomalies. For more than 100 years, the world's most powerful food and beverage companies have relied on cheap land and labor to produce inexpensive products and huge profits. But these profits have often come at the cost of the environment and local communities around the world, and have contributed to a food system in crisis.

Today, a third of the world's population relies on small-scale farming for their livelihoods.[4] And while agriculture today produces more than enough food to feed everyone on earth, a third of it is wasted;[5] more than 1.4 billion people are overweight, and almost 900 million people go to bed hungry each night.

The vast majority of the hungry are the small-scale farmers and workers who supply nutritious food to 2–3 billion people worldwide,[6] with up to 60 percent of farm laborers living in poverty.[7] At the same time, changing weather patterns due to greenhouse gas emissions[8] – a large percentage of which come from agricultural production – are making farming an increasingly unreliable occupation.

Adding to the vulnerability of poor farmers and farm workers, food prices continue to fluctuate wildly, and demand for soy, corn, and sugar to feed affluent diets is on the rise. And to top it off, the very building blocks of the global food system – fertile land, clean water, and reliable weather – are growing scarce.

These facts are not secrets; companies also realize that agriculture has grown risky and are taking steps to guarantee future commodity supplies and to reduce social and environmental risks along their supply chains.

Today, food and beverage companies speak out against biofuels,[9] build schools for communities and cut back on water usage in company operations. New corporate social responsibility programs are proliferating and declarations of sustainability are now ubiquitous. The CEO of PepsiCo, Indra Nooyi, in fact noted in 2011, 'It is not enough to make things that taste good. PepsiCo must also be "the good company." It must aspire to higher values than the day-to-day business of making and selling soft drinks and snacks.'[10]

But such claims of better environmental and social behaviour have thus far been extremely difficult to assess, despite rapidly growing consumer demand to know the truth of these claims.

Now, Oxfam's **Behind the Brands campaign** evaluates where companies stand on policy in comparison with their peers and challenges them to begin a 'race to the top' to improve their social and environmental performance. By targeting specific areas for improvement along the supply chain, the campaign pinpoints policy weaknesses and will work with others to shine a spotlight on the practices of these companies.

Behind the Brands is a part of the GROW campaign. Oxfam's GROW campaign aims to build a better food system: one that sustainably feeds a growing population (estimated to reach nine billion people in 2050) and empowers poor people to earn a living, feed their families and thrive.

Oxfam's campaign focuses on 10 of the world's most powerful food and beverage companies – **Associated British Foods (ABF), Coca-Cola, Danone, General Mills, Kellogg, Mars, Mondelez Internatonal (previously Kraft Foods), Nestlé, PepsiCo** and **Unilever** – and aims to increase the transparency and accountability of the 'Big 10' throughout the food supply chain.

At its core, the campaign features the **Behind the Brands scorecard.** The scorecard examines company policies in seven areas critical to sustainable agricultural production, yet historically neglected by the food and beverage industry: **women, small-scale farmers, farm workers, water, land, climate change,** and **transparency**.

According to the scorecard rankings, **Nestlé** and **Unilever** are currently performing better than the other companies, having developed *and* published more policies aimed at tackling social and environmental risks within their supply chains. At the other end of the spectrum, **ABF** and **Kellogg** have few policies addressing the impact of their operations on producers and communities.

Yet the scorecard also clearly shows that all of the Big 10 – including those which score the highest – have neglected to use their enormous power to help create a more just food system. In fact, in some cases these companies undermine food security and economic opportunity for the poorest people in the world, making hungry people even hungrier.

Behind the Brands reveals that the social responsibility and sustainability programs which companies have implemented to date are typically tightly focused projects to reduce water use or to train women farmers, for example. But these programs fail to address the root causes of hunger and poverty because companies lack adequate policies to guide their own supply chain operations.

Important policy gaps include:

- **Companies are overly secretive about their agricultural supply chains, making claims of 'sustainability' and 'social responsibility' difficult to verify;**
- **None of the Big 10 have adequate policies to protect local communities from land and water grabs along their supply chains;**

- **Companies are not taking sufficient steps to curb massive agricultural greenhouse gas emissions responsible for climate changes now affecting farmers;**
- **Most companies do not provide small-scale farmers with equal access to their supply chains and no company has made a commitment to ensure that small-scale producers are paid a fair price;**
- **Only a minority of the Big 10 are doing anything at all to address the exploitation of women small-scale farmers and workers in their supply chains.**

Although the Big 10 food and beverage companies consider themselves limited by fiscal and consumer demands, they do in fact have the power to address hunger and poverty within their supply chains. Paying adequate wages to workers, a fair price to small-scale farmers, and assessing and eliminating the unfair exploitation of land, water and labor are all steps which clearly lie within the means of these hugely powerful companies.

Oxfam's Behind the Brands campaign encourages companies to reassess 'business as usual' and instead begin a race to the top; a healthy competition among the Big 10 to ensure a more sustainable and just food system for all.

# 1 INTRODUCTION

Stop and consider for a moment:

Worldwide, people drink more than 4,000 cups of Nescafé every second[11] and consume Coca-Cola products 1.7 billion times a day.[12] Three companies control 40 percent of the global cocoa market,[13] and Nestlé reported revenues in 2010 larger than the GDP of Guatemala or Yemen.[14]

In fact, the 'Big 10'– **Associated British Foods (ABF), Coca-Cola, Danone, General Mills, Kellogg, Mars, Mondelez Internatonal (previously Kraft Foods), Nestlé, PepsiCo** and **Unilever** [15] – collectively generate revenues of more than $1.1bn a day[16] and employ millions of people directly and indirectly in the growing, processing, distributing and selling of their products.[17] Today, these companies are part of an industry valued at $7 trillion,[18] larger than even the energy sector[19] and representing roughly ten percent of the global economy.[20]

The Big 10 generate revenues of more than $1.1bn a day and employ millions of people directly and indirectly

But unlike the manufacture of branded sneakers or the creation of new electronic gadgets, what is grown, where, and how it is distributed affects every human being on earth.

**Figure 1: The food system**


Source: Oxfam

Yet making sure everyone always has enough nutritious food to eat has not been the focus of these powerful members of the global food system. For the past century the food and beverage industry has used cheap land and labor to produce the least expensive products possible – often of low nutritional value – while maximizing profits. Costs like the impact of drained water resources, rising greenhouse gas emissions, and exploitative working conditions have remained off company ledgers, while the industry and its shareholders have prospered.

Today the Big 10 are also under increasing scrutiny as diseases such as diabetes and obesity – global epidemics now considered as pressing as hunger – are linked directly to the consumption of the 'junk food' and sugary beverages they produce.[21]

Of course, these companies are not the only ones responsible for hunger and poverty in the world. But, as is described in this report, their success has hinged on the availability of cheap land and labor supplied by poor communities around the world. Additionally, the Big 10 today have the power to exert substantial influence over the traders and governments which control and regulate global food supply chains. They are also the most visible part of the industry, and are putting their own reputations at risk as consumers grow more concerned about what they buy and from whom.

Companies are also now aware that the very supply chains they rely upon are now in jeopardy as competition for fertile land and clean water increases, climate change makes weather uncertain, and farmers leave agriculture in droves due to low income and dangerous working conditions. Paul Polman, CEO of Unilever, which stopped reporting quarterly profits in 2009, has stated:

> '…business will have to change. It will have to get off the treadmill of quarterly reporting and operate for the long term. It will have to see itself as part of society, not separate from it. And it will have to recognise that the needs of citizens and communities carry the same weight as the demands of shareholders. We believe that in [the] future this will become the only acceptable model of business. If people feel that the system is unjust and does not work for them, they will rebel against it. And if we continue to consume key inputs like water, food, land and energy without thought as to their long-term sustainability, then none of us will prosper.'[22]

Other companies have also expressed various degrees of commitment to more responsible corporate behavior. Nestlé, after years of insufficient attention to the cocoa supply chain, conducted an assessment in 2011 through the Fair Labor Association and discovered numerous cases of child and forced labor, which the company has now begun to address.[23] Unilever made ambitious public commitments to source more raw materials from small-scale farmers and pledged 100 percent sustainable sourcing for all its main commodities by 2020.[24]

Yet these assessments and commitments, while important first steps, have not resulted in concrete changes in company policies and practices and often do not address the industry's role in the social and environmental causes of poverty and hunger.

As part of Oxfam’s GROW campaign – an initiative aimed at building a better food system – the **Behind the Brands campaign**

- tracks company progress in seven fundamental areas with Oxfam’s **Behind the Brands scorecard.** These criteria assess company policies and rank corporate commitment to creating a sustainable and just food system;
- will drive **public actions** bringing to light controversial practices and weak policies of the Big 10. The campaign will also recognize and applaud companies when they make needed progress;
- hosts an **interactive website** where individuals can access scorecard rankings, find helpful resources and communicate directly with companies to urge them to take responsibility for their actions.

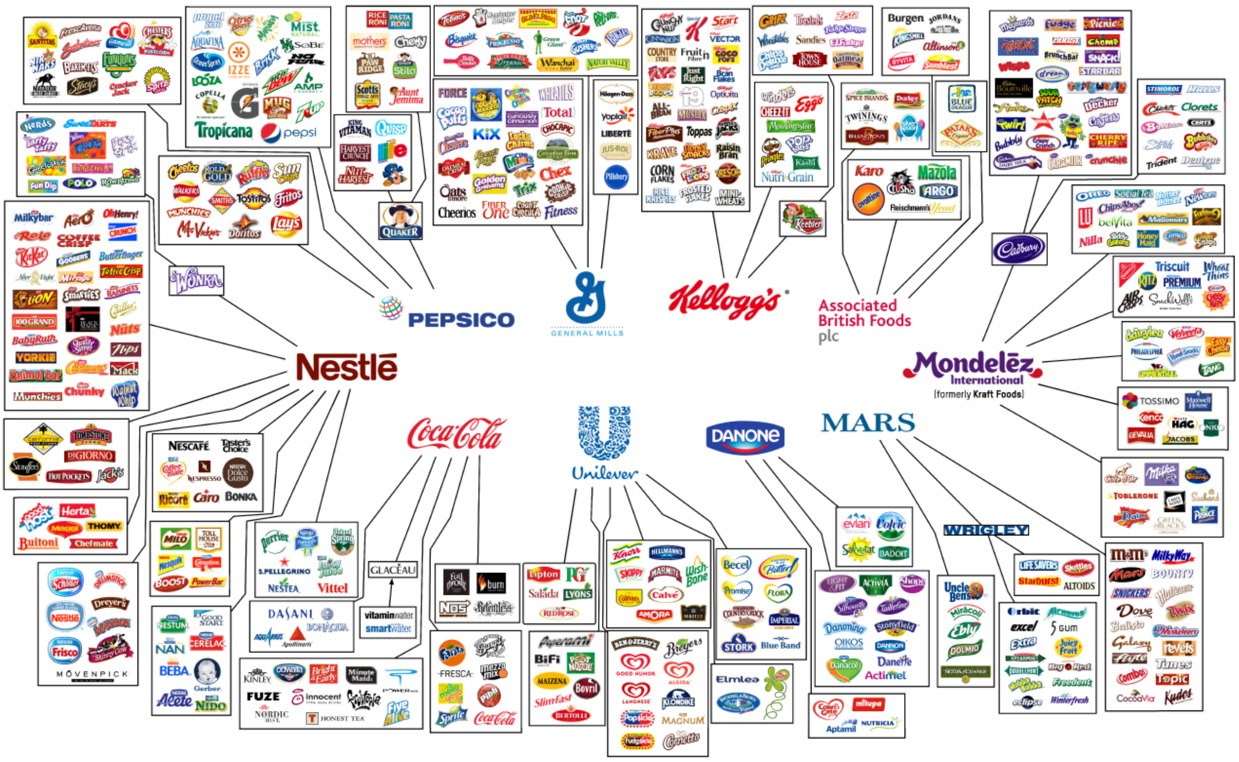
Companies must acknowledge that decisions made in the boardroom over the last 100 years have had an enormous impact on millions of people. The Big 10 must now make clear and meaningful policy and practice changes to ensure a more just and sustainable food system, able to meet the needs of producers and consumers everywhere, always.

# 2 THE FOOD AND BEVERAGE INDUSTRY: A FORGOTTEN LEGACY

Walk into any supermarket in the world and you'll be immediately surrounded by a startling amount of food. Thousands of boxes of cereal, yogurt in every size and flavor, rows and rows of condiments and frozen food products – the modern-day American supermarket carries more than 38,000 products.[25] In China, where no supermarkets existed in 1989, annual supermarket sales today total $100bn.[26]

Although the sheer number of products suggests that consumers have a great deal of choice, the reality is that most of those cans, boxes and bottles are made by very few companies (see Figure 2).[27] Products once produced by smaller companies like Odwalla[28] or Stonyfield Farms[29] are now owned by the Big 10, and even older, more established products like Twinings[30] (now more than 300 years old) have become just another brand on a company spread sheet.[31]

**Figure 2: Which brands do the big food and beverage companies own?**




Source: Joki Gauthier for Oxfam 2012. For more information on this figure, and to see it online, visit http://www.behindthebrands.org

This consolidation of the market-place has made it difficult for consumers to keep track of who produces which products and the 'values' behind a brand. Additionally, already vulnerable small-scale farmers now have even fewer buyers for their products, leaving them with an increasingly weak bargaining position and with less market power.[32]

But perhaps more troubling is that since the global food system has become so complex, food and beverage companies themselves often know little about their own supply chains. Where a particular product is grown and processed, by whom, and in what conditions are questions few companies can answer accurately and rarely share with consumers.

Today, 450 million men and women labor as waged workers in agriculture, and in many countries, up to 60 percent of these workers live in poverty.[33] Overall, up to 80 percent of the global population considered 'chronically hungry' are farmers,[34] and the use of valuable agricultural resources for the production of snacks and sodas means less fertile land and clean water is available to grow nutritious food for local communities. And changing weather patterns due to greenhouse gas emissions[35] – a large percentage of which come from agricultural production – continue to make these small-scale farmers increasingly vulnerable.

450 million men and women labor as waged workers in agriculture. In many countries, up to 60 percent of these workers live in poverty.

These are facts the food and beverage companies currently acknowledge, but are doing little to address. And although the relationship between the growing power of the food and beverage industry and endemic poverty and hunger is now well understood, the sourcing of commodities – cocoa, sugar, potatoes, tomatoes, soy, coffee, tea and corn – is still plagued with injustice and inequity, much as it was 100 years ago.

## THE BEGINNINGS OF THE FOOD AND BEVERAGE INDUSTRY

The modern food and beverage industry had its beginnings in the 19th century, when preservation techniques (like pasteurization and canning) and transportation advances (like rail and refrigeration) made the widespread processing and distribution of foods possible.

At the same time however, political developments also allowed young food and beverage companies to flourish. Colonial governments and emerging dictators made land and labor freely available, guaranteeing companies cheap commodities (see Box 2). The production costs of expensive luxury foods like chocolate, tea and sugar fell, and as companies successfully lobbied for lower tariffs and taxes, consumers in Europe and the USA began enjoying the new treats en masse.

Yet in the process, these early ventures left their mark on local communities worldwide. The emissions caused by the industrial processing of food, the draining of water resources, and the impact of harsh working conditions, while seemingly a free ride for businesses, were costly for communities around the world.

# From the lands of the poor came the sweets of the rich

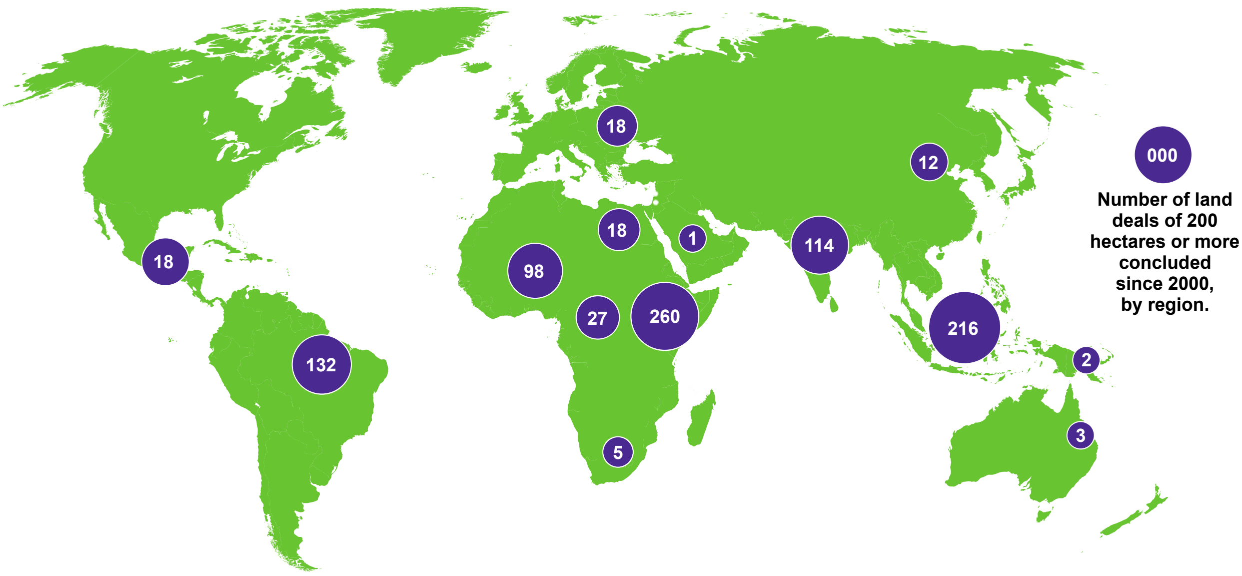
Cadbury chocolates (now owned by Mondelez), Lipton tea (Unilever), Wrigley's chewing gum (Mars), and Nescafé coffee (Nestlé) – as the popularity of the young brands of the early 20th century grew in Europe and the USA, so too did the need for tropical land to cultivate the raw materials required to produce them.

Caribbean colonies and Cuban haciendas churned out sugar for sweets in Europe, while tea consumed throughout the British Empire was grown in India[36] and Sri Lanka. West African oil palm plantations planted by private companies like Lever Bros (now Unilever) brought new supplies of raw materials for products like margarine to markets across Europe.[37]

Land given over to these farms and plantations was hotly contested and the struggle for ownership of fertile land continued after colonized countries gained their independence.[38] Privatization often meant that those with the most power and influence gained access to land, while less affluent residents – often women – lost control over communal and private property alike.[39]

Today, the controversial leasing and selling of land is alive and well, and increasing.[40] Since 2000, more than 900 large-scale land deals have been recorded (see Figure 3),[41] the vast majority of which took place in 32 countries with 'alarming' or 'serious' levels of hunger.[42] More than 60 percent of foreign land investors intend to export everything they produce, and in many cases, what is grown will be processed not into food but fuel.[43] To make matters worse, land acquired between 2000 and 2010 in these deals could have produced enough food for 1 billion people.[44]

**Figure 3: Summary of large-scale land deals by region since 2000**




Source: Land Matrix, the online public database on land deals, http://landportal.info/landmatrix/get-the-detail?mode=map (accessed December 2012)

While land is rarely directly owned by the Big 10 (or their subsidiaries), they have largely ignored the questionable acquisition of land by their suppliers.[45] And as companies grow and merge, responsibility for displacement and other land rights violations is inherited by the acquiring company.

**Box 1: Oil palm plantations in Indonesia**

**Unilever**[46] sources palm oil from Wilmar International, a company accused in 2011 of illegally clearing forest and other land and violently driving people off their land in Indonesia after longstanding disputes. Unilever continues to purchase palm oil from Wilmar[47] as it is satisfied with the company's decision to participate in the World Bank CAO-led mediation process. This process, initiated when affected communities brought repeated complaints to the Bank about its support to the company and the impacts of Wilmar's plantations, brings the company and the communities to the table to address the grievances of the affected people.

Closely related to the race for land is the race for water, and like land, there will not be enough to go around. Water scarcity is already affecting almost one-fifth of the world's population, and water use has increased at more than twice the rate of population growth over the last century.[48]

Agriculture is the single largest use of the world's fresh water – with about 70 percent used for irrigation.[49] Water contamination is also a major threat to human health; the food sector is responsible for 54 percent of organic water pollutants.[50]

## Not just cheap land, but cheap labor too

Cultivation of commodity crops like sugar, chocolate, and vanilla requires intensive labor, and early on production costs were kept low by using slaves. Even after the practice was made illegal, slavery continued in agriculture, as was found on Rowntree's and Cadbury's cocoa farms in Trinidad in 1905.[51] (See Box 2)

**Box 2: Illegal slave labor used in cocoa fields**

In 1880, the first large-scale cocoa plantations in Africa began on the Portuguese colonies of São Tomé and Principe – islands which became known for their illegal use of slave labor.[52] Leading chocolate companies at the time purchased this cocoa, including Cadbury and Fry Brothers (now owned by Mondelez) and Rowntree's (the maker of KitKat, now owned by Nestlé).[53] Over the next century these companies have continued to struggle with labor issues in cocoa fields and in 2009 Cadbury responded to consumer concerns by pledging to buy 100 percent fairly traded cocoa for chocolate sold in the UK.[54]

Sadly, the exploitation, and often enslavement, of workers has still not ended, although slavery in agriculture is less prevalent than a century ago. Families who have toiled in Sri Lanka's tea estate districts for generations, for example, continue to have lower incomes, higher rates of malnutrition, and lower levels of educational attainment than other laborers in the country.[55] (See Box 3)

**Box 3: Bonded labor in tea production**

In the 1890s, Thomas Lipton (of Lipton Tea, now owned by Unilever) bought his first four tea plantations in the Nuwara Eliya district of Sri Lanka (then Ceylon).[56] The region became known for extreme poverty, lack of clean drinking water and high alcoholism rates.[57] At the end of the 20th century Unilever also bought and sold other plantations in the area. Today, the company has promised to source 100 percent of tea from Rainforest Alliance-certified farms globally.[58] However, studies critical of Rainforest Alliance certification have recently been published,[59] and very few independent evaluations are available on the costs and benefits for producers and workers of participation in certification schemes.[60] In correspondence with Oxfam, Unilever asserted their positive impact, declaring that: 'The Rainforest Alliance program has led to improved conditions for tea smallholders and workers of the tea estates and that impact assessments have pointed to higher yields and improved profitability for farmers and workers, improved understanding of fertilizers and safer agrochemical use.'

Agriculture remains one of the three most hazardous industries to work in (along with mining and construction), and agricultural workers fare worse than workers in any other sector, as farms are often rife with labor exploitation, unsafe working conditions and informal work arrangements.[61]

**Box 4: Harsh working conditions on tea plantations**

In 2011, on Rainforest Alliance-certified tea plantations in India from which Unilever sources tea, researchers found problems regarding payment of minimum wage, discrimination against women, substandard housing and sanitation and the unprotected application of pesticides. Many plantation workers were also found to have been denied permanent contracts. Many of these practices constitute violations of Indian labor laws, International Labor Organization (ILO) standards and Unilever's own standards for suppliers.[62] Unilever has responded to these allegations[63] and says it will address these issues, provided relevant information about third party suppliers is provided. A forthcoming report by Oxfam and the Ethical Tea Partnership, 'Understanding Wages in the Tea Industry', shines a light on wages in Malawi and Assam that fail to meet the basic needs of tea pluckers and their families, despite being legally compliant, and raises questions about the ability of certification schemes to deliver a living wage.

Forced labor too remains a problem in the industry. **Nestlé** in November 2011[64] found that four-fifths of its cocoa sourced from the Ivory Coast comes from channels for which information on labor is lacking[65] and discovered numerous cases of forced and child labor.[66] In response, Nestlé has developed an action plan to address these challenges.[67]

Similarly, the growing and harvesting of sugarcane, historically done with slave labor, is also considered one of the most problematic commodities in the world. In Brazil, 28 percent of all rescued forced laborers from 2003 to 2011 came from sugarcane fields.[68]

## Pushing small-scale farmers out of the picture

Over the past 100 years, small-scale farmers have been displaced from their lands by governments and companies in search of fertile land.

Sprawling sugar, oil palm, and, more recently, soy plantations pushed families to poor quality land on the arid sides of mountains, often far from water, where they then attempted to farm. These plantations not only monopolized natural resources, they also benefited from credit and infrastructure that smaller farms did not have access to.

Today, an estimated 404 million farms cultivate less than two hectares of land and support the livelihoods of about a third of the world's population.[69] But as most of these farmers are forced to also buy the bulk of their food, when food prices increase families are often left choosing between feeding themselves, educating their children or maintaining essential health care.

**Box 5: Small-scale farmers in supply chains**

Farmers in Heilongjiang province in China say they have been short-changed for years at **Nestlé** milk-collection stations. Chinese media report that milk stations manipulate measurements to make milk appear to be lighter, and farmers have no recourse as Nestlé retains power over the grading system. Reportedly, the prices paid were below government-guided prices. 'Some of us are so angry that we would rather kill our cows than send the milk to Nestle,' farmer Zhao Yongwu said.[70] Yet the 20,000 milk farmers in the city of Shuangcheng must deliver their milk to Nestlé, which holds the contract providing it with a monopoly. Nestlé claims it has replaced a milk station manager and is conducting an investigation of its collection stations.[71]

The vast majority of small-scale farmers produce for their families and for local and regional markets and are not integrated into international supply chains (with the notable exceptions of cocoa and coffee). Yet the total number of small-scale farmers selling commodities to multinational companies is growing, and the presence of agribusinesses in communities impacts the ability of all farmers to access natural resources, markets, credit and technical support.

## Still a man's world

Even on early plantations, women made up a large portion of the workforce but were disproportionately employed in lower-paying jobs as seasonal or part-time workers and were paid lower wages than men doing the same job.[72] Additionally, colonial powers often brought with them new views on land ownership that frequently left women out of the equation entirely, unable to own land and without the means to buy it.[73]

Cash crops like coffee and tea in colonial and post-colonial times became the domain of men, who received training from companies and government extension services while women were restricted to hired labor working the fields.[74] Often, trading licences like those issued in Kenya were only given to men.[75]

Due in part to this legacy, women continue to have less access than men to land and other resources vital to food production. Yet these inequities have been renewed and reproduced consistently over the past century, and today women small-scale farmers in Africa, for example, own just 1 percent of agricultural land, receive only 7 percent of extension services, and less than 10 percent of agricultural credit is offered to women.[76]

The Big 10 have not demonstrated a serious commitment to promoting equality for women farmers and workers in their supply chains. Women in agriculture are over-represented in the lowest-paid jobs, while men are employed in the positions which receive the highest pay.[77] It is also often women who produce commodities like cocoa, tea and coffee, yet it is usually men who sell such crops to traders and control the cash received as payment.[78]

## A changing climate impacts farmers

From 1900 to 2008, global greenhouse gases (GHG) increased more than 16 times, almost a third of which was due to agricultural activities, land use change, and agricultural shipping.[80]

Today climate change adds to the vulnerability of farmers as weather grows increasingly unpredictable and events like drought and floods become more frequent and extreme. For farmers in El Salvador, for example, maize production could fall by as much as 32 percent and bean yields could drop by a quarter by the 2020s.[81] The number of people at risk of hunger worldwide is projected to increase by 10–20 percent by 2050 because of climate change.[82]

The industrial farming which supplies many of the Big 10 is also leading to rapid conversion of carbon sinks and bio-diverse habitats for massive monocultures of oil palm, soy and sugar.[83] Yet until recently, companies paid very little attention to the environmental impacts of their production processes. While some companies have begun to take steps to reduce emissions, five of the Big Ten fail to report any emissions from agriculture. No company has established agricultural emissions reduction targets, nor have they begun to help farmers adapt to weather changes.

Only half of the Big 10 measure and disclose greenhouse gas emissions in their supply chains. Mars' findings have revealed that 56 percent of total company emissions come from 'purchased goods and services',[79] mostly from agriculture. Other companies are likely to have at least as large a footprint from their agricultural production.

## Transparency in short supply

As with environmentally sound policies, transparent business practices were a rarity for companies in the early 20th century. Governments did not require disclosure of businesses activities, and consumers had limited knowledge or interest in where products came from or how they were made.

Yet transparency is critical to measuring a company's economic, environmental and social impact. Without transparency, governments cannot develop effective policies and the public cannot make informed choices.

Today, demand for transparency is coming from all sides – investors, consumers, retailers, governments, and NGOs – and the ability to more

Most companies still provide little information about where commodities are grown, by whom, or the quantities involved.

**Nestlé** scored highest on transparency, as they provide information about some of their commodity sources and audit systems.

easily track and report issues within supply chains now exists. In the oil, gas, and mining industry, for example, public pressure led to the adoption of rules in the U.S. Dodd-Frank Wall Street Reform and Consumer Protection Act,[84] requiring US-listed companies to report payments to governments on a country-by-country and project-by-project basis. The electronics industry too is showing increased willingness to voluntarily provide supply chain transparency: Hewlett-Packard, Intel, and Apple now publish lists of their suppliers. And back in 2005, Nike[85] became the first company in the apparel industry to make public its global suppliers and associated manufacturing information. Yet in the food and beverage industry, the Big 10 insist they must be secretive about their supply chain to maintain a competitive advantage. Few voluntarily disclose any information about who produces their raw materials, where, and how much.

When companies do take steps to improve their disclosure, it is often through specific multi-sector transparency initiatives like the Carbon Disclosure Project (CDP)[86] and the Global Reporting Initiative (GRI).[87] Yet these assessments do not require comprehensive disclosure of all social and environmental impacts. Therefore, participation in one or both initiatives is not sufficient for a company to claim it is transparent.[88]

# 3 WHY MUST COMPANIES ACT?

If companies have a long legacy of abuse and created many of the issues now endemic in the food system, why does Oxfam believe they could play a leading role in the fight against poverty, hunger and food insecurity?

Oxfam sees four reasons why the Big 10 have a vested interest in creating a more just and sustainable food system. First, all companies have human rights responsibilities. Second, social pressure and environmental changes are forcing the industry to do things differently. Third, some of the Big 10 believe 'doing well by doing good' makes good business sense. Last, and perhaps of greatest significance, consumers, investors and governments are increasingly demanding better sustainability and social responsibility and are pushing companies to implement significant and far-reaching reforms.

## HUMAN RIGHTS AS CORPORATE MANDATE

In 2011, the United Nations recognized the vast human rights impacts of businesses and endorsed a detailed set of responsibilities applicable to all companies.[89] Under the UN Principles, companies are required to undertake 'due diligence' to ensure that they do not violate human rights, and to address and mitigate any adverse impacts in any of their 'activities or relationships,' extending down their supply chains and across business and government partners. To meet these requirements, companies must put in place policies and processes to identify and manage human rights risks, engage with relevant suppliers, stakeholders and government bodies, and establish grievance mechanisms to redress any abuses.[90]

The UN Principles have found their way into multilateral standards, national laws, and investor agreements.[91] And closer to home, the Big 10 all have made their own commitments to social responsibility, and have begun to act on these promises.

In fact, many of these companies began with the stated intention to help those in need. For example, John Harvey Kellogg developed corn flakes initially to offer a more nutritious breakfast to both the American wealthy and poor.[92] And Isaac Carasso – founder of Danone – began making and selling yogurt when he saw children in his home country of Spain suffering from intestinal problems at the end of World War I.[93]

More recently, some of the Big 10 have made public commitments to addressing social and environmental problems in their supply chains, in line with UN and International Labor Organization (ILO) guidelines. Many are also participating in multi-stakeholder initiatives and commodity roundtables and have committed to upholding all or part of specific international guidelines such as the UN CEO Water Mandate and the UN

Women's Empowerment Principles. There are also several positive examples of projects wherein companies have made an effort to address supply chain challenges (see Box 6).

**Box 6: Companies continue the journey toward better social responsibility and sustainability**

In recent years, companies have made a number of important commitments to address their social responsibility and sustainability. Among the most notable, PepsiCo has publicly recognized the human right to water and Coca-Cola has pledged to become water neutral by 2020 through its Live Positively Program.[94] In 2010 Associated British Foods (ABF) introduced a policy to source all palm oil from sustainable sources by 2015 (via the Roundtable on Sustainable Palm Oil)[95] and for the first time published an assessment of its corporate responsibility.[96]

In addition, some of ABF's largest subsidiaries, including Twinings Ovaltine, have committed in their code of conduct to pay farm workers a living wage, or enough to meet their basic needs.[97] In 2012 Unilever committed to engaging with at least 500,000 small-holder farmers in its supply network, to 'improve their agricultural practices and thus enable them to become more competitive'.[98] In 2009, Mars was the first in the industry to commit to sourcing 100 percent of its cocoa from certified sources by 2020 and Nestle launched its own strategy to engage in 'areas with the greatest potential for joint value optimization between our business and society'.[99] In 2012, General Mills agreed to align its reporting with the Global Reporting Initiative guidelines.[100]

Yet there continues to be a serious disconnect between the industry's broader public promises to achieve sustainability and the actual policies which govern their supply chains. Companies know and disclose too little about the injustices flourishing in their supply chains, and continue to cherry-pick particular initiatives. And while philanthropic projects, certifications, round tables and sustainability programs are certainly welcome, they are not long-term solutions to deeply entrenched injustices. Such programs also do not address the full range of the industry's human rights risks and impacts.

Instead, comprehensive policies must be implemented, enforced and continuously evaluated throughout the supply chain, alongside efforts to engage government, civil society and industry leaders, to rid the industry of perennial human rights abuses.

## SOCIAL AND ENVIRONMENTAL PRESSURES

One hundred years ago, food and beverage companies were not concerned about diminishing resources or rising food prices. But today, the supply chain has grown increasingly risky and companies must address an uncertain future.

This insecurity is driven by a range of factors. Resources are growing scarce as climate change, unsustainable use of land and water, ecological degradation and deforestation worsens.[101] This is combined with a rising demand for meat and dairy, expanding biofuels production and a growing global population. And as supply booms and busts, food prices rise, making commodities attractive to financial speculators. Thus the cycle continues, with serious consequences for people living in poverty.[102]

Additionally, low pay, irregular work and dangerous conditions for workers currently provide little incentive for young people to stay in agriculture. In Ghana, for instance, small-scale cocoa growers earn just 80 cents a day.[103] In Thailand, natural disasters and the rising cost of fertilizers are driving rice farmers into cumulative debt.[104] And workers on banana plantations are often forced to use dangerous agrochemicals without protective clothing, leading to severe health problems.[105]

In Ghana, small-scale cocoa growers earn just 80 cents a day.

Many of these communities are now fighting back and rejecting bad working conditions and the taking of their natural resources by governments and companies. Local communities in Indonesia, for example, filed complaints with the Compliance Advisor Ombudsman office of the International Finance Corporation against Wilmar (a Unilever supplier) for land rights violations (see Box 1).[106] Similarly, in Senegal, groups representing small-scale farmers have banded together to declare their commitment to small-scale family farming and their condemnation of 'the grabbing of our natural resources (land, water, forests) and granting them to agro-industrial stakeholders.'[107]

## DOING WELL BY DOING GOOD

Although some argue that responsibility to shareholders prevents companies from addressing social and environmental risks, many business leaders now see the long-term financial viability of the food and beverage industry as directly tied to the well-being of communities and habitats worldwide.

CEOs cite a variety of reasons why it makes business sense for them to be attentive to corporate responsibility, including meeting ethical and philanthropic responsibilities, developing and maintaining legitimacy and reputational capital, and building stronger relationships with stakeholders.[108]

For example, Muhtar Kent, CEO of The Coca-Cola Company said, '…we recognize that the success and sustainability of our business is inextricably linked to the success and sustainability of the communities in which we operate. The strength of our brands is directly related to our social license to operate, which we must earn daily by keeping our promises to our customers, consumers, associates, investors, communities, and partners.'[109]

The belief in 'doing well by doing good' is also backed up by current research. Operational efficiency gains, reduced operating costs, and enhanced employee relations and productivity are just a few of the many payoffs for firms focused on social and environmental responsibility.[110] Initiatives characterized as corporate social responsibility are often just good business.

Additionally, indices such as the Dow Jones Sustainability Index (DJSI) and FTSE4Good show that companies which embrace the essential qualities of corporate responsibility generally outperform their peers.[111] Harvard Business School professor Michael Porter says data now shows that 'doing well by doing good' makes sound business sense,[112] and the concept of 'shared value' has been adopted by a number of companies, including Nestle.[113]

Yet without proper transparency to substantiate company claims, it is impossible to assess exactly how much good a company is really doing and their overall impact on communities around the world.

## THE RISE OF THE ENGAGED CONSUMER AND SHAREHOLDER ACTIVIST

Alongside the recent actions of companies and communities to secure the future of their food supply chain, shareholders and consumers are now also pushing for dramatic changes.

Shareholders are increasingly demanding companies be more transparent in their operations and develop long-term strategies to manage social and environmental risks in their supply chains. In the U.S., one out of every nine dollars professionally managed is now invested as a sustainable or responsible investment with assets in these funds totalling $3.31 trillion in 2012.[114]

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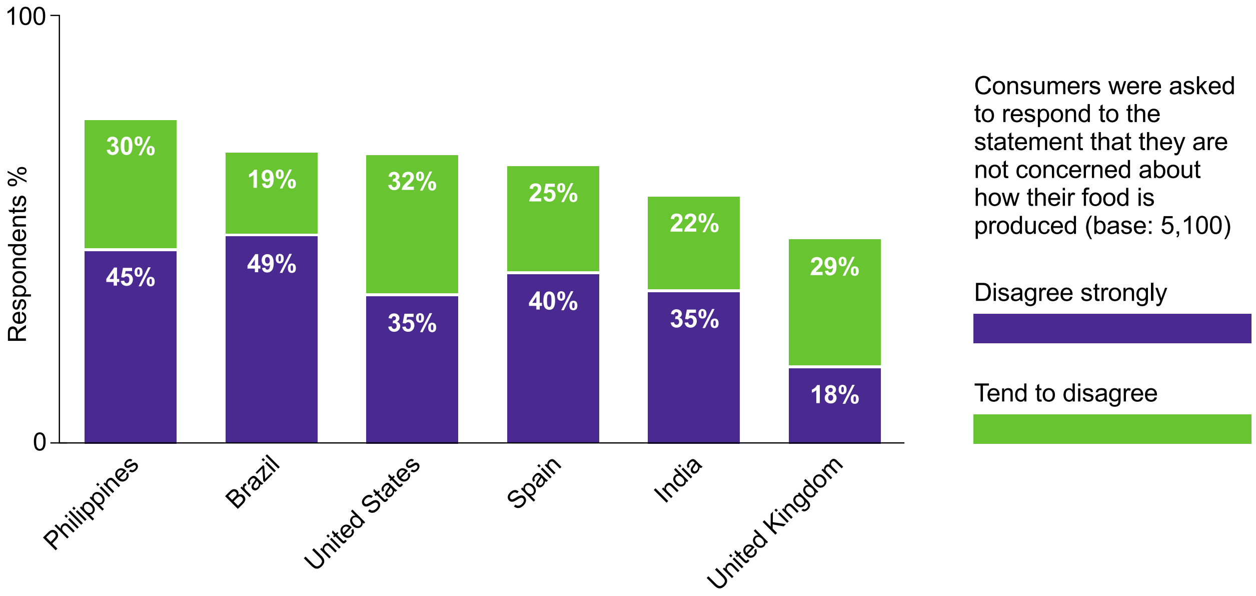
A wide range of institutional investors now also seek to influence companies through shareholder advocacy. In the last two years alone, more than 200 institutional investors and management firms filed or co-filed shareholder resolutions on environmental, social or governance issues, representing well over a trillion dollars in assets.[115] Kraft, for example, was the subject of a shareholder resolution in 2012 urging the company to provide information on its impact on deforestation.[116]

Consumers are also increasingly concerned about social and environmental issues within company supply chains, and are willing to back up their convictions with their purchases.

A Nielsen poll of more than 28,000 online responses from 58 countries found that more than half of respondents from Asia, the Middle East and Africa – huge emerging consumer markets – are willing to pay more for products that 'give back to society'.[117] Likewise, an Oxfam study also found the vast majority (almost 90 percent) of women interviewed in India, Brazil and the Philippines say they want to be better informed about how the foods they buy can make a difference in the world.[118] Many also expressed concern about how the food they buy is produced (see Figure 4)[119] and more than half of those surveyed believe companies should support practices that help eradicate hunger and poverty.[120]

**Figure 4: Consumers are concerned about how their food is produced**




Source: Oxfam (2012) 'The Food Transformation: Harnessing Consumer Power to Create a Fair Food Future', Oxford: Oxfam International http://oxf.am/Jnu

Company reputations and sales are also on the line when consumers learn of wrongdoing along the supply chain. In China, a two-year study carried out in nearly all of China's provinces found more than three-quarters of respondents are willing to 'not purchase or reduce their purchasing of fast moving goods (snacks, beverages, etc) produced by companies who are not socially responsible'.[121] Weber Shandwick found 70 percent of consumers in the U.S. now avoid buying products from companies they do not like,[122] and almost as many say they are increasingly checking products to find out who makes them. The study also reported that almost two-thirds of a company's market value is attributable to its reputation.

These findings are not limited to academic surveys. In 2011, global sales of just one fair trade certification initiative, Fairtrade International, increased by 12 percent in one year.[123] Another fair trade producer, Equal Exchange, grew 29 percent in 2011,[124] and Cafédirect is now the fifth largest coffee brand and seventh largest tea brand in the UK.

Oxfam has played an active role in the fair trade movement since its beginning. Over the last four decades, the fair trade movement has sought to respond to the failure of conventional trade to deliver sustainable livelihoods for small-scale farmers in the developing world. While fair trade cannot be effective in isolation from the structural changes needed in the food and beverage industry, it has provided a lifeline to hundreds of thousands of producers and has helped to inform and empower consumers. Annual sales of Fairtrade certified goods are now considerable, reaching a total of $5.8bn in 2009.[125]

Popular films and consumer social media campaigns are also successfully pushing companies and governments to do better. After the German documentary 'The Price of Bananas' aired across Europe, the Ecuadorian government announced new laws regarding aerial spraying of chemicals.[126] And a viral spoof advert viewed by more than 1.5 million people initiated more than 200,000 protest emails to Nestlé after Greenpeace revealed weak palm oil sourcing practices in one of the company's most popular brands, KitKat. The campaign forced Nestlé executives to introduce better policies against deforestation. The company has since invested in a Digital Acceleration Team to monitor online sentiment about their brands.[127]

Similar campaigns on a range of issues have been successfully waged against some of the most powerful companies in the world. 'Pink slime,' debit card fees, tax avoidance, gay rights and countless other issues have exploded into public dialogue seemingly overnight because of the growth of social media.

These shifts in both social technology and consumer behaviour mean that companies are increasingly vulnerable to consumer opinion and must respond to consumer pressure faster than ever.

# 4 WHAT IS THE 'BEHIND THE BRANDS' CAMPAIGN?

Currently, trying to assess company sustainability programs and claims of social responsibility is like trying to look at cells without a microscope. Because companies keep supply chain information hidden from view, it is difficult to see how talk of environmental or social improvements along the supply chain actually play out on the ground.

Oxfam is therefore turning to public company policies to assess the commitment of companies to improve the food system. The **Behind the Brands scorecard** dives deeply into a company's publicly disclosed policies to evaluate the intention of businesses to assess, evaluate and improve the social and environmental effects of their direct and indirect operations in seven key areas.[128] The aim of the scorecard is to generate a 'race to the top,' allowing companies to gain an understanding of where they stand in comparison with peers and helping them consider areas of improvement in the sourcing of raw materials.

The scorecard will then serve as the core of the **Behind the Brands campaign**, an initiative to work with consumers, governments and companies to hold the food and beverage industry accountable for its social and environmental impact on farmers, workers and communities worldwide.

## THE SEVEN CRITERIA

The **Behind the Brands scorecard** examines company policies in *seven areas* critical to sustainable agricultural production which have been historically neglected by the food and beverage industry: **women, small-scale farmers, farm workers, water, land, climate change, and transparency**.

### Women

Women account for 43 percent of the agricultural work force and are responsible for the vast majority of domestic tasks,[131] yet are often excluded from land ownership, are paid less than men for the same jobs and have limited opportunities. Because women are the backbone of the workforce in so many areas of the world, eliminating gender discrimination and supporting women in accessing and leading community activities and worker organizations could impact millions of people around the world.

The Behind the Brands scorecard examines whether the policies of the Big 10 promote women's welfare and encourage their inclusion in the food supply chain on equal terms. The scorecard also looks for policies which guarantee a discrimination-free workplace.

Women make up 43 percent of the agricultural workforce.[129]

In Cameroon, women produce up to 80 percent of the food, yet own only 2 percent of the land.[130]

## Small-scale farmers

Successful small-scale farms contribute to rural development and create local jobs.[134] They also take better care of the environment than large agribusiness when small-scale farmers rotate crops and use chemicals less intensively. Because they diversify crops, smaller farms are also potentially more nutritionally efficient than larger ones,[135] often meaning better food security for poor regions.

The scorecard assesses how the Big 10's policies ensure that those who feed the world don't go hungry themselves. The scorecard looks for policies which guarantee small farms access to company supply chains on equitable terms, allow farmers to earn a decent income, and channel investments to them (such as agricultural services, credit and inputs) which boost productivity. It also assesses the commitment of companies to ensure that supply chains comply with sustainable production standards, including Fairtrade, Utz Certified and Rainforest Alliance.

More than 400 million farms worldwide are 2 hectares or smaller (less than 5 acres).[132]

400–500 million small farms provide livelihoods for approximately 2–3 billion people worldwide.[133]

## Farm workers

With more than 1 billion people employed in the sector (nearly 35 percent of the global workforce), agriculture is the second largest source of employment worldwide.[137] Paying farm workers a living wage and guaranteeing safe and protected working conditions can therefore help billions of people escape from poverty and will ensure that millions of children will not be forced to work in order for their families to survive.

The scorecard assesses whether business policies enforce fair working conditions along the supply chain, allowing farm workers to organize and access grievance procedures and ensuring that agricultural workers earn enough to meet the basic needs of their families (a 'living wage').

More than 1 billion people work in agriculture – 35 percent of the global workforce.

More than half (53 percent) of the 215 million child laborers worldwide are involved in agriculture.[136]

## Climate change

The vulnerability of farmers is exacerbated by a changing climate, created in part over the past 100 years by the food and beverage sector – one of the industries most responsible for greenhouse gas emissions. Up to 29 percent of all greenhouse gas (GHG) emissions come from 'food systems,[139] and yet little is being done to assess and prevent such emissions.

The scorecard looks for company policies which lead in mitigating harmful GHG emissions as well as assessing and implementing long-term solutions to changes already in motion.

Up to 29 percent of all greenhouse gas emissions come from 'food systems.'

Globally, 1.7 billion farmers are highly vulnerable to climate change impacts.[138]

## Land

In the past decade, an area of land amounting to eight times the size of the UK has been sold off or leased globally; from mid-2008 to 2009 alone agricultural land deals with foreign investors in developing countries increased by almost 200 percent.[140]

The scorecard measures whether companies have put in place policies to ensure their supply chains are free from 'land grabs'. This includes policies that promote free, prior and informed consent through the entire supply chain and insists on zero tolerance for those suppliers who obtain land through violations of land rights and land tenure.

In the past 10 years, an area eight times the size of the UK has been acquired by investors.

This land could be used instead to feed 1 billion people, more than the number of hungry people in the world today.

## Water

Water is the lifeline of agricultural communities and is a human right. Increasingly it is also a scarce resource, and today communities around the world are fighting for local control of water as businesses also demand access. Many companies, through initiatives like the CEO Water Mandate,[143] are starting to address these concerns. Yet there is much more to be done.

The scorecard assesses policies which demonstrate a company's commitment to respecting the human right to water, to disclosing and reducing water use and discharges throughout its operations, and to better managing the use of water from water-stressed regions.

By 2025, 1.8 billion people will be living in countries or regions with absolute water scarcity. Two-thirds of the world's population are expected to have limited access to clean water.[141]

Over the next 40 years, the world's water will have to support agricultural systems to feed and create livelihoods for an additional 2.7 billion people.[142]

## Transparency

Transparency is essential if consumers, producers, governments and communities are to genuinely hold companies accountable for the impacts they have on small-scale farmers and their families, and to substantiate company claims of sustainability. At a minimum, this means disclosure of information about where products are from and from whom the company purchases raw materials. Given their powerful role in advising governments on how to regulate the global food system, company lobbying efforts and financial contributions to governments must also be made public.

The Behind the Brands scorecard assesses the extent to which companies readily make this information available.

# WHAT BEHIND THE BRANDS DOES NOT COVER

The Behind the Brands scorecard assesses policies and commitments – not company practices – because the size, scale, complexity and lack of transparency of the Big 10's supply chains make it impossible to assess and compare their impacts on the ground in a meaningful way. Oxfam sees policies as an important indicator of a company's intentions, although these commitments can clearly be used as public relations campaigns rather than for guiding practice in the field. Company performance ultimately depends on how the company chooses to do business and whether it implements policies through internal training, incentives, control systems and performance measures which bring 'teeth' to policies. Otherwise, they may not be worth the paper they are written on and care must be taken not to confuse company policy with action.

Company policies will often diverge drastically from actual farm-level conditions and practices. Well-written company policies are no guarantee that farmers and workers in supply chains do not face serious problems. Thus, it is vital that consumers, governments, and others know the commitments made by these companies, demand stronger commitments where these are weak, and ultimately hold companies to account for them. Oxfam also encourages people to learn about and engage with campaigns driven by other organizations that address social and environmental injustices in the supply chains of major food companies.

In holding companies accountable, Oxfam does not promote or support boycotts of company brands, but instead encourages consumers to engage by demanding transparency and putting public pressure on companies to improve their policies and practices. Oxfam understands, however, that citizens will make their own legitimate choices as to how to respond to weak policies or evidence of exploitation.

Additionally, the Behind the Brands campaign does not address a number of important issues relevant to food and hunger. Nutrition is one such area. Food and beverage companies have an overwhelming impact on nutrition through the products they manufacture, the public policy standards they support (or block), and their marketing strategies. Other aspects of corporate governance and behaviour which have a significant impact on poverty reduction, such as food waste and tax payments, are also not covered.

The Behind the Brands campaign focuses primarily on the millions of small-scale farmers and plantation workers who produce the world's food but who do not themselves have enough food to eat. It does not focus on the labour conditions of workers in processing, manufacturing, distribution and sales or other parts of the company value chain. Finally, the Behind the Brands campaign does not take into account sourcing from OECD countries (except Mexico and Chile).

Oxfam supports the efforts of other organizations and institutions which seek improvements in these areas and is working closely with a number of them.

For more information on the GROW campaign see http://www.oxfam.org/grow.

# 5 HOW ARE COMPANIES DOING? RANKS AND TRENDS

The Behind the Brands scorecard scores companies based on policies in the seven key areas outlined in Section 4. A more detailed explanation of how companies were scored is available online at www.behindthebrands.org. Appendix A also includes information on how the scorecard was tabulated. Oxfam's scoring and rankings should in no way be construed as an endorsement of a particular company.

**Table 1: Behind the Brands: food companies scorecard**

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 |

This scorecard was made on 26 February 2013. The latest version is available at http://oxfam.org/behindthebrands

## WHAT DO THE RANKINGS SHOW?

All of the Big 10 have acknowledged the need for a more just food system and have made commitments to that end. Yet the Behind the Brands scorecard shows these very same companies are currently failing to take the necessary steps in their policies to ensure the well-being of those working to produce their products. Instead they continue to profit from a broken system they should be helping to fix.

Unilever and Nestlé are higher performing companies than the rest, having developed and published more policies aimed at tackling social and environmental risks within their supply chains. However, the scorecard also reveals that these two companies are apparently ignoring urgent, escalating problems. Land-grabbing and the exploitation of women are largely ignored in the sector and Nestlé and Unilever are no exception.[144] They have failed to declare zero tolerance against land grabs, even though millions of acres of land have been unjustly seized from poor farmers and rural communities over the last decade.[145] And both companies have failed to issue company policies addressing the crushing poverty and exploitation of women farmers and agricultural workers.

At the other end of the rankings, Associated British Foods (ABF) and Kellogg have also not addressed land rights concerns or the poverty and lack of opportunity for women working in the supply chain. Kellogg has made an initial effort in Mexico to analyze and understand the challenges small-scale farmers face and the impacts of its operations on them,[146] but has not made any commitments to improve the livelihoods of farmers supplying their raw materials. ABF has no clear policies on land rights and land tenure security in its supply chain, even though the company is a major producer of sugar, a commodity which is often produced on plantations plagued with land rights violations.[147]

It is clear that all of the Big 10 must do much more to create a food system which ensures everyone has enough to eat, always. Below are the key trends revealed by the scorecard.

## TRENDS AND CHALLENGES

While there has been some progress, the policies and commitments of the Big 10 fail to address the scale of the challenge that they face, nor will the policies be nearly enough to satisfy the growing expectations of shareholders, consumers and governments. (See the discussion of shareholder, consumer and government expectations in Section 3.)

The following trends and challenges uncovered by the Behind the Brands scorecard indicate where companies must do much more to help tackle poverty and hunger.

**Companies are overly secretive about their agricultural supply chains, making claims of 'sustainability' and 'social responsibility' difficult to verify**

The Big 10 have not made a commitment to full transparency, making it difficult to accurately assess claims of sustainability and social responsibility. The information they provide is at best selective and inconsistent. In many cases, it is non-existent.

Currently companies reveal information for only select commodities in select locations. Nestlé and Danone are the most transparent, revealing the countries they source from and the volume of key commodities they purchase. By contrast, ABF discloses the location and quantities related to coffee, tea, palm oil and sugar cane sourcing, but the company does not offer details of how much soy, cocoa, wheat and dairy they source. General Mills[148] and Kellogg[149] only provide information on palm oil and release no information on any other commodity.

Furthermore, all companies provide very limited information about the identity of their suppliers.

### None of the Big 10 have adequate policies to protect local communities from land and water grabs along their supply chains

All 10 companies source palm oil, soy and sugar; commodities often grown in developing nations on plantations rampant with land rights violations. Yet companies are not doing enough to prevent these land grabs.

With the exception of Coca-Cola, all 10 of the companies have now joined the Roundtable on Sustainable Palm Oil.[150] This is a step in the right direction, as it requires palm oil producers to commit to free, prior and informed consent (FPIC), a crucial element in ensuring that the land rights of local communities are not violated. Yet no other commodity is given this same attention by the Big 10, although Nestlé committed to FPIC in both soy and palm oil sourcing.[151]

Furthermore, no company has introduced any other policies to stop land grabs. None have declared zero tolerance of the practice or have any guidelines requiring suppliers not to engage in land grabbing.

### Policies fail to protect communities' rights to water

In recent years, many companies have limited the amount of water used in their operations and have increased the water efficiency of their production plants.[152] But most have avoided the tougher challenge of assessing and limiting their impact on local water sources, particularly in water-stressed regions where competition for water is more intense. Only Coca-Cola[153] and PepsiCo[154] have developed policies that take into account the effect of their activities on local communities' access to water.

Companies are just beginning to acknowledge indirect supply chain responsibility around water management. Nestlé has developed supplier guidelines to manage water, particularly in water-stressed areas.[155] Yet even as the company has set these requirements, Nestlé faces criticism for its actual management of water in water-stressed regions (see Box 7).

**Box 7: Water for life or luxury in Pakistan**[156]

Over-exploitation of water in Pakistan is leading to falling water tables, increasing the cost of water for local communities that rely on water for basic livelihoods and survival.

Nestlé makes big profits from selling bottled water in Pakistan – Pure Life is the country's favourite bottled water,[157] representing about 50 percent[158] of the bottled water market.

The bottling is done at a factory next to communities in Pakistan's Sheikhupura region, where access to safe water is inadequate. However, Nestlé allegedly pays only pumping costs for the ground water it extracts. Locals claim the company has not done enough to provide access to water for local communities, whose water needs are just a tiny fraction of the water that Nestlé is extracting for its own operations.[159] Now, communities near Nestlé's factory pay higher costs for pumping as the water level is said to have fallen from approximately 100 to 300–400 feet.[160]

Nestlé has responded on its website,[161] stating that its wells are managed in a responsible manner. The company also states that it has built two water filtering facilities to provide clean drinking water to more than 10,000 people in the region, and is in the process of building an additional facility in Bhatti Dilwan.[162]

Over the past decade, only PepsiCo has taken the crucial first step of publicly recognizing that water is a human right and committing to consult local communities on plans to develop water resources. Other companies have made significant progress on measuring and reporting water impacts but do not address the fundamental issue of water ownership or the rights of local communities to clean water.

**Companies are not taking sufficient steps to curb the massive agricultural greenhouse gas emissions responsible for climate changes now affecting farmers**

The emissions from agriculture linked to large food companies are massive – they typically represent more than 50 percent of their total emissions profile. Until companies take steps to reduce these emissions, the largest food companies cannot claim they are taking climate change seriously.

All of the companies have taken steps to measure and reduce emissions from direct operations (such as electricity usage). Yet only five – Mondelez (Kraft), Danone, Coca-Cola, Unilever and Mars – measure and report agricultural emissions associated with their products. Unilever is alone in making a commitment to cut its overall greenhouse gas footprint in half by 2020, although even this commitment lacks a specific target for agricultural emissions reductions.

Furthermore, none of the Big 10 have yet developed policies to help farmers build resilience to climate change.

**Most companies do not provide small-scale farmers with equal access to their supply chains and no company has made a commitment to ensure that small-scale producers are paid a fair price**

No company is committed to paying a fair price to farmers, nor are they committed to fair business arrangements with farmers. Only Unilever, which is the top-ranked company with respect to small-scale farmers, incorporated specific supplier guidelines to promote improved conditions for small-scale farmers. Yet even with such guidelines in place, companies must continually assess and ensure guidelines are implemented, as Unilever's vanilla supply chain illustrates below (see Box 8).

**Box 8: Poverty and child labor in vanilla production**

Unilever is one of the largest and most influential buyers of vanilla in the world, and purchases roughly 8 percent of all the vanilla produced in Madagascar for use in its ice cream products. However, the production of vanilla in Madagascar by small-scale farmers is allegedly plagued with problems of unsustainable farm gate prices and child labor. According to the International Labor Organization, studies show that child labor in vanilla production affects about one-third of all children in Madagascar between the ages of 12 and 17 years.[163]

In response,[164] Unilever has said it only buys vanilla from a few large global suppliers and regional producers, and that they comply with Unilever's Supplier Code and exercise the necessary diligence with their own suppliers to ensure systemic child labor is not deployed.[165] The company has also said it has no direct responsibility for auditing vanilla production on the island, but that child labor is unacceptable.[166]

In communications with Oxfam in 2012, Unilever noted that it is working with vanilla suppliers to address the needs of vanilla growing communities.

Companies made some changes with respect to recent efforts to invest more heavily in key commodities that are tied to small-scale farms – especially coffee, tea and cocoa. In fact, Unilever, Nestlé, Kraft and Mars have all made commitments to invest in small-scale producers, with Unilever and Mars committing to 100 percent sustainable sourcing for tea and cocoa.[167] While this commitment helps farmers improve crop productivity and quality and reduce input costs, companies have also not yet committed to guaranteeing a fair price for farmers.

**Only a minority of the Big 10 are doing anything at all to address the exploitation of women small-scale farmers and workers in their supply chains**

In spite of the structural abuse and exploitation of women in agriculture today, none of the Big 10 are currently engaged in resolving the hardships and challenges women face within their supply chains.

None of the 10 knows or is attempting to find out how many women farmers are involved in their supply chains or in which types of farming activities they are engaged. Without such knowledge, the Big 10 cannot determine whether women are at risk of exclusion or exploitation, and whether women have equal access to the safer, better paid and more stable jobs often reserved for men at the farm level. While all companies have a non-discrimination policy for their own employees, they do not extend this right to women farmers – those who are the most vulnerable and for whom the infringement of their rights is the least visible.

Some companies, like Coca-Cola and PepsiCo, have signed on to the Women's Empowerment Principles,[168] and both companies participate in projects that seek to improve sourcing opportunities for women farmers in developing countries through We Connect International.[169] But these commitments are only the beginning of the journey, not the end.

# 6 THE BIG 10 RESPOND

Over the past decade, Oxfam has communicated with food and beverage companies about their impact on the food system. And during the months leading up to the launch of the Behind the Brands campaign, Oxfam presented the evidence gathered to the Big 10 and asked for their feedback.[170]

All of the companies participated in providing feedback to Oxfam about the campaign. However, three common rebuttals surfaced as to why companies believe Oxfam's focus on the food and beverage industry is misguided: the problems of the food system, they say, are caused largely by **governments, traders** and **consumers**.

Yet these responses do not exempt food and beverage companies from taking an active role in promoting social and economic fairness along the supply chain, even if others in the industry appear to be moving in the wrong direction. The Big 10 are uniquely positioned to introduce positive changes in the food system.

## THE ROLE OF GOVERNMENTS

Governments are responsible for ensuring their citizens' basic human rights, and they are charged with regulating private sector practices and policies within their borders. They are also responsible for protecting the interests of those who are less powerful in the marketplace – typically the vast majority of their citizens.

But earlier colonial and dictatorial support of business has now translated into governments neglecting to regulate multinationals, by ignoring anti-trust laws created to stop or reverse the consolidation of the agribusiness sector, or labor laws enacted to protect workers.[171] Today there is a dramatic concentration of wealth and power in the food and beverage industry worldwide, and in many cases, governments have lost control of the sector within their own boundaries, creating a significant governance gap.[172] In addition, companies have at times vigorously lobbied and spent considerable funds to obtain favorable treatment before governments and multi-lateral institutions.

Governments should take urgent steps (see section 7) to reverse this on-going trend. But at the same time, the Big 10 hold considerable sway with governments. Companies must align this political influence with their public commitments, and deploy it in a transparent and responsible manner.

## THE HIDDEN POWER OF TRADERS

Traders are a powerful, unique and often invisible part of the food system. The major traders – Archer Daniels Midland (ADM), Bunge, Cargill and Louis Dreyfus, collectively known as ABCD – play a significant role in every part of the system, controlling, for example, 90 percent of the global trade in grains. Other emerging market trading companies such as Olam, Sinar Mas and Wilmar are also quickly establishing a global presence.[173]

Traders are central to almost every aspect of the modern food system: they provide seed and fertilizer to farmers and control the companies that buy, transport, store and sell their grain. They act as landowners, cattle and poultry producers, food and biofuel processers, and provide financial services in commodity markets.

Increasingly, traders also depend on the control of information about how much and where food is produced globally, allowing them to profit from the volatility which cripples both producers and consumers of food.[174] Many believe this market dominance allows traders to manipulate food markets – though the lack of transparency makes it impossible for anyone to know, except when information is leaked.[175]

Despite these concerns, responsibility for improvement of the food system also lies with food and beverage companies. As purchasers of the products traders sell, the Big 10 have direct and important relationships with them and can exert enormous influence over the way they operate. It is the Big 10 and not the traders who are most visible to consumers.

As a result, food and beverage companies are already working with their suppliers through multi-stakeholder initiatives. Oxfam welcomes the food companies' concerns about traders and encourages even greater efforts to help reform those who supply their raw materials.

## CONSUMER RESPONSIBILITY

Some Big 10 companies claim their role is simply to respond to consumer demand and that, because consumers want ever cheaper snack food, they can only remain competitive if they keep production costs as low as possible. Guaranteeing a living wage to those working along the supply chain and continually assessing where products are grown and under what conditions is expensive, they argue, and shareholders will not accept a fall in profits due to such expenses.

Yet the notion that companies are at the mercy of consumer demand is disingenuous at best. The industry plays a substantial role in manufacturing consumer demand and in hiding the reality of their impacts on communities. Companies spend millions annually to conceal sourcing practices and routinely engage in sophisticated lobbying, marketing and public relations campaigns in order to shape public opinion about food and how it is made. In this way, companies themselves are key drivers and generators of consumer demand.

There is also a growing body of evidence that shows consumers want companies to operate in socially and environmentally responsible ways and are willing to pay more for products produced in conditions beneficial to small-scale producers and local environments. (See *'The rise of the ethical consumer and shareholder activist'* in Section 3.) When consumers are armed with the facts and have an accurate understanding of company impacts, companies will find it much more difficult to avoid taking responsibility for their actions.

Instead of utilizing huge investments to obscure the impacts of their operations, companies can and should employ some of their substantial resources to develop products and practices that support a more just food system.

# 7 CONCLUSION

Once upon a time, the food and beverage industry gained unrestricted access to cheap land and labor and made huge profits at the expense of communities and habitats around the world.

But that time is now ending.

Today's food system is broken and unsustainable. 1.4 billion people are considered overweight and nearly 900 million people are chronically hungry. Water and land resources are growing ever more scarce, and food prices are volatile. And consumers and governments are pushing companies to prioritize the nutrition and vitality of far-away communities. In other words, the food system is poised for change, and the Big 10 can help or hinder its progress.

The Big 10 must develop a vision to include and support men and women small-scale farmers, farm workers and producers, while ensuring that their operations are sustainable and fair. Global supply chains should provide everyone with an opportunity to escape poverty and hunger, and cannot allow the few to profit at the expense of the many. To deliver this vision, Oxfam is calling on food and beverage companies, consumers, and governments to take the following actions.

## RECOMMENDATIONS

### Food and beverage companies

The seven areas used to assess company policies in the Behind the Brands scorecard need urgent attention. As a first step, the Big 10 need to be transparent about how they do business and from where and whom they buy their commodities. They also need to improve their understanding of their supply chains by 'knowing and showing' their impacts and disclosing the commodities and regions where injustices are most prevalent. Lastly, and most importantly, companies must commit to eliminating the injustices in their supply chains and explicitly require their suppliers to raise their standards to ensure actual practices on farms are drastically improved.

Oxfam urges the Big 10 and others to adhere to the following policies within their supply chain:

1. **Recognize responsibility for all significant social and environmental impacts of agricultural production within the supply chain.** Set ambitious, transparent and time-bound targets for sustainable and equitable sourcing of key commodities, working with publicly disclosed suppliers to meet commitments. Publish progress on these targets annually.

2. **Assess the number and gender of small-scale farmers and workers currently in the supply chain**. Conduct participatory and transparent assessments of social and environmental impacts of operations and sourcing on farmers, workers, women and affected communities. Establish time-bound remedial action plans with suppliers.
3. **Assess the number and role of women involved in the supply chain as farmers or workers and the issues they are facing**. Ensure that contracts and provision of services account for the risks and constraints women face, including mobility and transportation of products, the protection of contracts and assets from seizure, lack of access to training and women's time-poverty caused by unpaid care activities and household responsibilities. Ensure women are able to participate equally at every level of the company and that they confirm fair treatment. Companies should also promote women's empowerment in the workplace, and women's control of land they farm.
4. **Develop targets for including small-scale farmers in the supply chain** and ensure their inclusion generates positive benefits for these farmers, their families and communities. Special attention must be given to the inclusion and support of women in the supply chain.
5. **Recognize and promote the human right to water, as defined by the United Nations**. Monitor and disclose data on agricultural water use and the quality and quantity of water discharged into rivers and lakes. Reduce water use at all levels, Companies must identify and disclose operations which source from water-stressed regions, and develop specific policies for those areas, in consultation with affected communities.
6. **Declare and implement zero tolerance for land grabbing (as defined under the Tirana Declaration)[176] and water grabbing**. A zero tolerance policy should be implemented throughout a company's agricultural operations. Company policy should ensure free, prior and informed consent of farmers and rural communities.
7. **Establish supply chain standards and policies which ensure that agricultural supply chains meet international labor standards established under International Labor Organization Conventions**.[177] This includes freedom of association and the right to bargain collectively, fair working conditions that protect workers' health and safety, an anonymous grievance process to register and address labor violations, and public recognition that all agricultural workers should earn enough to meet the basic needs of their families – a 'living wage'.
8. **Disclose agricultural greenhouse gas emissions in company supply chains and set targets to achieve deep absolute reductions in emissions from large-scale producers.** Disclose climate change risks and how they will affect small-scale producers, as well as implement programs and strategies that build their resilience.

9. **Use political and economic power to influence government policies and change industry practices**. Food and beverage companies should lobby transparently and accountably, consistent with their social responsibility commitments, to make the global food system more just and sustainable. They should collectively challenge governments as well as agricultural traders to curtail practices that sustain higher and more volatile food prices, including commodity speculation and the conversion of food to fuel. And they should demand more ambitious and multilateral action by governments and other industries to tackle climate change, both through emissions reductions and the provision of public finance for adaptation, especially for small-scale food producers.
10. **Use convening power to promote collective solutions to systemic problems in the industry.** The Big 10 have outsized power to bring business, government and civil society leaders together. Working with key stakeholders, food and beverage companies should support collaborative efforts at the local, national and global levels to address the most pressing challenges.

## Governments

Governments bear the responsibility for protecting their citizens' rights, including the rights of male and female small-scale farmers and farm workers and ensuring that businesses do not violate these rights. This should be accomplished through comprehensive laws and effective oversight, consistent with international human rights and labor conventions, and key principles agreed upon at the Committee on World Food Security. Governments must ensure that citizens have access to effective judicial mechanisms to protect their basic rights.

Governments must also build a new global governance to avert food crises. The GROW Campaign is calling for transformational reforms of trade, food aid, financial markets and climate finance to reduce the risks of future shocks and to respond more effectively when they occur. Governments should also craft global agreements for a more equitable distribution of scarce resources.

Governments should work with multilateral donors and progressive investors to ensure adequate investment in and support for smallholder farmers. Governments can help build markets through policy reforms and by encouraging businesses to integrate smallholders into national and global supply chains in an equitable manner.

In addition, governments should:

1. Implement regulations to ensure that companies' impacts on surrounding communities and their ecosystems and rights to land and other assets, as well as on regional food security, are understood and addressed in an open and accountable manner, with complaints resolved.

2. Support diversified farm systems that take into account the roles of women and men and avoid creating dependence of smallholders on one company, through investments that enhance trade in alternative or local markets, or markets for secondary or complementary products.
3. Prioritize the needs of small-scale farmers and producers in developing countries where the biggest gains in productivity and resilience can be achieved. Develop and implement policies that guarantee small-scale farmers’ access to natural resources, technology and markets, and policies that provide men and women with equal access.
4. Require robust environmental, social and governance disclosure for food and beverage (and other agribusiness) firms, especially those publicly listed on stock exchanges, whether for direct or indirect agricultural operations.
5. Work with other governments to implement ambitious domestic and multilateral action to tackle climate change, both through deep emission reductions and the provision of public finance for adaptation, especially for small-scale food producers; including through agreement of a fair, ambitious and legally binding global agreement on climate change by 2015.
6. Together with industry, develop and foster partnerships with farmers that:
    a. Deliver fair returns that meet national living wage standards and ensure agricultural workers’ rights are protected;
    b. Ensure fair sharing of risks (production risks due to weather, pests and other factors affecting harvests) and provide support in adapting to climate change, timely communication about supply and demand, flexibility for farmers to respond to changing conditions, and financial risk management schemes;
    c. Set out clear commitments for the company to purchase products at guaranteed fair prices, with transparent terms of trade, quality standards and pricing structure, and to maintain a set price for inputs. A dispute resolution mechanism should be established that can engage the wider community, beyond the smallholders directly involved.

# Consumers

In the face of such large and powerful companies, many individuals see themselves as powerless. Yet consumers have enormous power over food and beverage companies and can exert pressure on them in order for the food system to change.

Oxfam’s GROW campaign is a resource for consumers to learn more about the food system and how it can become more just and sustainable. The campaign’s website offers practical resources for consumers wanting to make a difference.

Consumers can also:

1. Learn more about the Behind the Brands campaign at behindthebrands.org, and invite friends and family to get involved by sharing information through social media.
2. Take action on issues by contacting the companies directly to urge them to provide better conditions for small-scale farmers and workers in their supply chains.
3. Make changes in how they buy and consume food. Oxfam's GROW Method suggests five easy ways to make a difference: reducing food waste, so we're making the most of the precious resources that go into making food; buying products and brands that ensure small-scale producers in developing countries get a fair deal; cooking smart, to cut down on wasted water and energy; buying food that's in season, so cutting down on greenhouse gas emissions; eating less meat and dairy to reduce both greenhouse gas emissions and water use.
4. Join the GROW campaign and take action with hundreds of thousands of other concerned citizens to urge governments, companies and other powerful institutions to play their part in creating a more just food system.

# APPENDIX A
# SCORECARD METHODOLOGY

Oxfam's Behind the Brands scorecard assesses, scores and ranks food and beverage companies on their corporate policies and commitments aimed at taking responsibility for the social and environmental injustices that lie within their agricultural operations.

Only publicly disclosed policies are considered for the scorecard. Policies which have not been published are not oriented toward promoting transparency, a key element of the scorecard and a prerequisite for a just food system.

Oxfam acknowledges that policies are just a first step toward promoting socially and environmentally acceptable practices, and many companies do not actually enforce such policies within their supply chains.

Further advancements will require governments to enforce and improve upon existing laws; and for civil society, working with farmers and consumers, to hold companies accountable for publicly declared commitments to supply chain participants and rural communities. The scorecard is then a starting place for improvement in the system, but is not the end of the journey.

Additional information on the methodology employed for the Behind the Brands scorecard can be found at http://www.behindthebrands.org

# APPENDIX B

# DECLARATION OF INTEREST: FINANCIAL AND PROGRAMMTIC TIES BETWEEN OXFAM AND THE BIG 10

Prior to the launch of the GROW campaign (in 2011) Oxfam already had relationships with a number of food and beverage companies featured in 'Behind the Brands'. Oxfam takes a multi-faceted approach to working with the private sector, including campaigning, collaborations and fundraising. The nature of any engagement Oxfam undertakes with a company depends on its goals, the context and the company.

All of Oxfam's engagements with companies are subject to Oxfam's ethical screening and risk assessment procedures. Oxfam is committed to being fully transparent and accountable for all its relationships with companies including with the Big 10 in the context of the Behind the Brands campaign. Notwithstanding the relationships set out below, Oxfam's analysis and scoring of the Big 10, and its interaction in relation to the Behind the Brands campaign, have been undertaken in a consistent and impartial manner across all the companies.

A compilation of financial, advocacy and program relationships between Oxfam and the Big 10 can also be found on the Behind the Brands website: http://www.behindthebrands.org

Significant relationships between Oxfam and the Big 10 include:

- **Unilever**: Oxfam has engaged with Unilever for over a decade. Activities include: provision of funding for Oxfam's UK poverty program and contribution of gifts in kind for Oxfam's humanitarian response: e.g. donations of soap during the 2011 Pakistan floods, the Haiti earthquake in 2010 and the food crisis in West Africa in 2012; research in the form of a collaborative poverty footprint study[178] published in 2005, an Oxfam study of labor rights in Unilever's supply chain published in January 2013, and a joint research project (co-managed by the Ethical Tea Partnership and Oxfam and involving Unilever as well as other Big 10 companies such as Mars and ABF) to investigate wages in the tea sector (forthcoming, 2013); and a partnership to explore inclusive business models that integrate smallholder farmers in Unilever's supply chain.
- **Coca-Cola**: Joint research and advocacy work through a collaborative Community Impact Study in Zambia and El Salvador.[179] Oxfam America also had a fundraising relationship with Coca-Cola; from 2007 to 2011, Oxfam America received $3m in humanitarian support for Sudan.
- With many of the companies included in 'Behind the Brands', working in a range of multi-stakeholder initiatives including the Roundtable on Sustainable Palm Oil (RSPO), the Sustainable Food Lab and the Sustainable Trade Initiative (IDH).

# NOTES

1 http://www.worldcrunch.com/poisoning-well-nestl-accused-exploiting-water-supplies-bottled-brands/business-finance/poisoning-the-well-nestl-accused-of-exploiting-water-supplies-for-bottled-brands/c2s4503/

2 http://www.savingiceland.org/2009/09/plundering-the-amazon/. Purchases were made by Kraft Italy.

3 http://www.cnn.co.uk/2012/05/01/world/asia/philippines-child-labor/Index.html. In response, Coke noted the following to Oxfam in 2012: "Similarly, while we are not aware of any instance of child labor in our direct supply chain, the Company acknowledges that child labor exists in sugar cane fields in Philippines and other countries around the world. We are working, along with governments, NGOs, civil society and others, to help address it. We believe the issue requires both a global and a local approach. By enabling the creation of a school in Bukidnon, The Coca-Cola Company is providing not only an alternative to working in the fields, but also an opportunity for the children to get an education so that they have the potential to rise out of poverty and to enjoy a better future."

4 www.ifad.org/operations/food/farmer.htm

5 FAO (2011), 'Global food losses and food waste: Extend causes and prevention.' http://www.fao.org/docrep/014/mb060e/mb060e00.pdf

6 www.ifad.org/operations/food/farmer.htm

7 P. Hurst (2007) 'Agricultural Workers and Their Contribution to Sustainable Development'. A collaborative report by the FAO, International Labor Organization and the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers Association, http://www.fao-ilo.org/fileadmin/user_upload/fao_ilo/pdf/engl_agricultureC4163.pdf (last accessed November 2012).

8 P. Smith and D. Martino (eds.) (2007) 'Agriculture' in B. Metz, O.R. Davidson, P.R. Bosch, R. Dave and L.A. Meyer (eds) (2007) Climate Change 2007: Mitigation of Climate Change, Contribution of Working Group III to the Fourth Assessment Report of the Intergovernmental Panel on Climate Change, Cambridge: Cambridge University Press, http://www.ipcc.ch/publications_and_data/ar4/wg3/en/ch8.html (last accessed November 2012).

9 he world's appetite for biofuels is pushing up global food prices and driving people off their land, resulting in deeper hunger and malnutrition in poor countries. Nestle, Unilever and PepsiCo have publically called on world leaders to no longer 'divert food for fuel' as 'the demand for biofuels has contributed to food shortages and competition for land and scarce water, disproportionately affecting the most vulnerable people', while often having a negative greenhouse gas balance'. See: www.oxfamamerica.org/press/pressreleases/global-food-and-beverage-companies-call-for-g20-action-on-biofuels-high-food-prices

10 J. Seabrook (2011), 'Snacks for a fat planet: Pepsi, snack foods and the obesity epidemic', The New Yorker. See: http://www.newyorker.com/reporting/2011/05/16/110516fa_fact_seabrook#ixzz2EJ5HSfof

11 C. Carpenter (2012), 'Nestlé's global Nescafé coffee sales equal 4,000 cups a second', Bloomberg, 7 March at http://www.bloomberg.com/news/2012-03-07/nestle-s-global-nescafe-coffee-sales-equal-4-000-cups-a-second.html (last accessed November 2012).

12 Coca-Cola. 125 Years of Sharing Happiness: A Short History of the Coca-Cola Company, p 5.

13 TCC Cocoa Barometer (2010) p.5. www.teacoffeecocoa.org/tcc/Publications/Our-publications

14 World Bank. *Gross Domestic Product 2011*. Nestle's 2011 revenue was approximately 105 billion USD.

15 Oxfam chose these 10 companies because they had the largest overall revenues globally. Oxfam also based its choice on the Forbes 2000 annual ranking, which measures companies' size on the basis of composite sales, assets, profits and market value. However, since the Behind the Brands Scorecard aims to include both public and private companies, and the Forbes 2000 ranking does not include private companies, Mars – the world's largest privately owned food and beverage company – is included in the rankings even though it does not appear on the Forbes 2000 list.

16 Based upon the Forbes 2000 list at www.forbes.com/global2000/list/. Regarding revenues (sales without deducting costs), and taking into account 2011 data (excepting for Mars, as only 2010 data were available), the top 10 food and beverage companies earn $418.08bn in 2011, which is equivalent to $1.145bn a day.

17 Based on Oxfam's internal research of the top 10 F&B companies.

18 The food sector includes traders, grocers and food and beverage companies, among others. See: http://www.etcgroup.org/sites/www.etcgroup.org/files/publication/pdf_file/ETC_wwctge_4web_Dec2011.pdf. See also http://www.imap.com/industries/

19 http://www.etcgroup.org/sites/www.etcgroup.org/files/publication/pdf_file/ETC_wwctge_4web_Dec2011.pdf.

20 Dow Jones Factiva, M&A Trends in the Food and Drinks Market: In-Depth Analysis and its Impact on the FMCG Landscape, cited in Food and Beverage Industry Global Report. The industry made almost $6 trillion in 2008 and is still growing. http://www.imap.com/imap/media/resources/IMAP_Food__Beverage_Report_WEB_AD6498A02CAF4.pdf

21 IMF (2012) 'World Economic Outlook', op. cit.

22 http://www.unilever.com/sustainable-living/ourapproach/messageceo/index.aspx

23 In response to FLA's recommendations, Nestlé developed an action plan outlining three phases of improvement activities to be completed by the end of 2012, 2013 and 2016. In the short-term, Nestlé agreed to develop a clear, illustrated guide to its supplier code by October 2012. Nestlé will distribute the guide to more than 20,000 farmers participating in Nestlé's sustainability initiative, the Nestlé Cocoa Plan. The company also agreed to conduct trainings empowering all employees who deal directly with farms to look for violations and encourage compliance with the labor code. Additionally, Nestlé agreed that its key suppliers will work with training agencies to fully incorporate the supplier code into training programs. See: http://www.fairlabor.org/blog/entry/fla-highlights-underlying-challenges-child-labor-after-extensive-investigation-nestl%C3%A9

24 See http://blogs.hbr.org/ideacast/2012/05/unilevers-ceo-on-making-respon.html. Paul Polman, CEO of Unilever, notes: "...we have developed products that are more relevant in resource scarce environments. We've worked up the supply chain to look at sustainable sourcing in a different way that is economically very attractive and gives us less of the shocks and shifts that you've seen in the last few years, especially when it comes to agriculturally based materials. Take sustainable sourcing for any of our materials that we look at. Well-managed, sustainable sourcing gives you a high yield per acre. And as a result, over time, not only do you have sourcing, the cost is down, the tea bushes last longer, the soil management is more responsible. You work with the communities around there that you create livelihoods that then buy your products."

25 Food Marketing Institute (2012) 'Supermarket Facts: Industry Overview 2010', http://www.fmi.org/research-resources/supermarket-facts (last accessed November 2012).

26 T. Reardon and A. Gulati (2008) 'The Rise of Supermarkets and Their Development Implications: International Experience Relevant for India', IFPRI Discussion Paper 00752, p 6, International Food Policy Research Institute, www.ifpri.org/pubs/dp/ifpridp00752.pdf (last accessed November 2012).

27 Supermarket chains tend to source from medium-sized and large suppliers when they are available and source from small farmers only indirectly through wholesalers and processors. These small farmers tend to be well-resourced. See: http://www.ifpri.org/sites/default/files/pubs/pubs/dp/ifpridp00752.pdf See also T. Reardon and C.P. Timmer (2007) 'Transformation of markets for agricultural output in developing countries since 1950: how has thinking changed?', chapter 13 in R.E. Evenson, P. Pingali, and T.P. Schultz (eds.) (2006) Handbook of Agricultural Economics (Vol 3): Agricultural Development: Farmers, Farm Production and Farm Markets, Amsterdam: Elsevier Press.

28 Odwalla is now owned by Coca-Cola.

29 Stonyfield Organic website, 'Our extended family', http://www.stonyfield.com/about-us/our-story-nutshell/our-extended-family (last accessed November 2012). Stonyfield Organic sold 85 percent of its shares to Danone in 2003.

30 Twinings is now owned by Associated British Foods.

31 Twinings was bought by Associated British Foods in 1964. See 'Twinings History', http://www.twiningsusa.com/twinings-heritage.php?id=8 (last accessed November 2012).

32 The FAO's Panel of Eminent Experts on Ethics in Food and Agriculture states that 'there are serious power imbalances arising from the concentration of economic power in the hands of a few'. Excessive concentration in output markets (trading, processing, manufacturing and retailing) can work against the interests of the producers, either by creating barriers to market entry, or by worsening the terms on which they engage in trade. Concentration among food and beverage companies is a key part of this problem. See: http://dfid-agriculture-consultation.nri.org/summaries/wp13.pdf. See also http://www.ukfg.org.uk/docs/UKFG-Foodinc-Nov03.pdf and http://www.fao.org/docrep/003/X9600E/x9600e05.htm.

33 P. Hurst (2007) op. cit.

34 See: http://canwefeedtheworld.wordpress.com/2012/10/31/fao-releases-new-conservative-hunger-numbers/. The UN Food and Agriculture Organization (FAO) defines chronic hunger as people being undernourished because they don't eat enough to get the energy they need to lead active lives. http://www.fao.org/hunger/en/.

35 P. Smith and D. Martino (eds.) (2007) op. cit. http://www.ipcc.ch/publications_and_data/ar4/wg3/en/ch8.html (last accessed November 2012).

36 S. Mintz (1986) Sweetness and Power: The Place of Sugar in Modern History, Penguin Books.

37 K. F. Kiple and K. C. Ornelas (eds.) (2000) The Cambridge World History of Food, section II.E.3 – Palm Oil, Cambridge: Cambridge University Press. Unilever established plantations with its subsidiary United Africa Company. Unilever noted in an e-mail to Oxfam: 'Unilever no longer owns any of these plantations and they have all been disposed of. Our West African palm oil plantations were sold some 3-5 years ago. Many of the buyers of these plantations view these businesses as contributing positively to the local community, benefiting productivity and generating employment.'

38 An example of this is contested land 'redistributed' during the rule of Malawi's former President, Hastings Banda.

39 K. Izumi (1999) 'Liberalisation, gender and the land question in sub-Saharan Africa', Gender & Development, 7(3): 9–18. Special issue, Women, Land and Agriculture.

40 The 2008 spike in food prices is widely recognized as having triggered a surge in investor interest in land: from mid-2008 to 2009 reported agricultural land deals by foreign investors in developing countries rocketed by around 200 per cent. The main drivers for the surge in land investment are the predicted medium and long-term increasing food prices, the increasing global demand for food and animal feed stock, the increased demand for biofuels, and carbon-trading mechanisms that place a commercial value on standing forests and rangelands. http://www.landcoalition.org/cpl

41 http://landportal.info/landmatrix

42 Article about the International Food Research and Policy Institute's 2012 Global Hunger Scorecard found on http://www.irinnews.org/Report/96521/FOOD-Land-grabbing-linked-with-hunger

43 W. Anseeuw, et al (2012) Transnational Land Deals for Agriculture in the Global South. Analytical Report Based on the Land Matrix Database, CDE/CIRAD/GIGA as cited in K. Geary (2012) 'Our Land Our Lives', http://oxf.am/Jtx.

44 J. Vidal (2012) 'Land acquired over past decade could have produced food for a billion people', the Guardian, 4 October, http://www.guardian.co.uk/global-development/2012/oct/04/land-deals-preventing-food-production (last accessed November 2012), citing K. Geary (2012) 'Our Land, Our Lives' op. cit.

45 The Tirana declaration of the International Land Coalition defines large-scale land acquisition as 'land grabs' when they do one or more of the following: violate human rights, particularly the equal rights of women; flout the principle of free, prior and informed consent (FPIC) for affected communities ; they are not based on a thorough assessment of, or disregard, social, economic and environmental impacts, including the way they are gendered; avoid transparent contracts with clear and binding commitments on employment and benefit-sharing; and/or they eschew democratic planning, independent oversight and meaningful participation. http://www.landcoalition.org/about-us/aom2011/tirana-declaration

46 Unilever (and Wilmar) are members of the Roundtable on Sustainable Palm Oil (RSPO), whose mission includes the 'responsible consideration of…communities affected by growers and mills). See: http://www.rainforest-rescue.org/press-releases/4030/unilever-indifferent-to-victims-of-palm-oil-business.

47 https://www.rainforest-rescue.org/mailalert/747/the-bloody-products-from-the-house-of-unilever

48 http://www.un.org/waterforlifedecade/scarcity.shtml

49 http://www.unwater.org/statistics_use.html

50 http://www.unwater.org/statistics_pollu.html

51 C. Off (2008) Bitter Chocolate: The Dark Side of the World's Most Seductive Sweet, New Press. Also Agricultural Society of Trinidad, Proceedings 1907. Page 305. Archived online at Google Books. Cadbury was one of the first companies to be concerned with allegations of using forced labor and investigated the supply chain on their own in the early 1900s. Also Anti-Slavery International (2004) 'The Cocoa Industry in West Africa: A History of Exploitation', p. 5, www.antislavery.org/includes/documents/cm_docs/2008/c/cocoa_report_2004.pdf

52 Anti-Slavery International (2004) op. cit.

53 Ibid

54 http://www.fairtrade.org.uk/press_office/cadburys_announcement_your_comments.aspx

55 See: http://transcurrents.com/news-views/archives/7375 (last accessed November 2012)

56 http://www.unilever.ca/brands/foodbrands/lipton_tea.aspx

57 Plantation Community in Nuwara Eliya District in Sri Lanka at kamome.lib.ynu.ac.jp/dspace/bitstream/10131/7426/1/7-Kurihara.pdf

58 http://www.unilever.com/brands-in-action/detail/Lipton/292025/

59 http://somo.nl/news-en/precarious-work-in-certified-tea-production-for-unilever

60 In correspondence with Oxfam, Unilever states otherwise, declaring that:'The Rainforest Alliance program has led to improved conditions for tea smallholders and workers of the tea estates and impact assessment have pointed to higher yields and improved profitability for farmers and workers, improved understanding of fertilizers and agrochemical use.'

61 ILO/FAO (2012) Decent Employment for Agricultural and Rural Development and Poverty Reduction, http://www.fao-ilo.org/ilo-dec-employ/en/?no_cache=1 (last accessed November 2012). See also: P. Hurst (2007) op. cit. , p. 20,

62 http://somo.nl/news-en/precarious-work-in-certified-tea-production-for-unilever

63 See: http://www.unilever.com/sustainable-living/news/news/ResponseToReportBySOMO.aspx and http://www.business-humanrights.org/media/documents/company_responses/updated-response-unilever-17-april-2012.pdf

64 Nestlé invited Fair Labor Association to conduct the assessment and mapping of its cocoa supply chain.

65 D. Doherty and S. James (2012) 'Nestlé audit finds child labor violations in cocoalabor supply', Bloomberg News, 29 June, http://www.bloomberg.com/news/2012-06-29/nestle-must-address-child-labor-in-cocoa-supply-fla-says.html (last accessed November 2012).

66 Ibid.

67 See footnote 19.

68 Comissão Pastoral da Terra – CPT, and Ministério do Trabalho e Emprego, MTE. The US Department of State's Labor 'Trafficking in Persons Report 2012' (Brazil) also reported that 'thousands of Brazilian men are subjected to trabalho escravo [slave labor] within the country, often on cattle ranches, logging and mining camps, sugar-cane plantations, and large farms producing corn, cotton, soy and charcoal…'. http://www.state.gov/j/tip/rls/tiprpt/2012/192366.htm (last accessed November 2012).

69 International Food Research and Policy Institute. Global Food Index 2012. Article found at http://www.ifpri.org/ghi/2012/centrality-land-water-energy-smallholders.

70 Xinhua, 'Chinese Milk Farmers Say Nestle Pocket Their Pay', 24 October 2011, at news.xinhuanet.com/english2010/china/2011-10/24/c_131210122.htm (8 May 2012) and http://news.xinhuanet.com/fortune/2011-10/23/c_111117450.htm (12 Nov 2012)

71 Xinhua, 'Nestle Promises Improvements After Allegations', 26 October 2011, http://www.china.org.cn/china/2011-10/26/content_23735336.htm

72 A. Otikula and J. Solotaroff (2006) 'Gender Analysis of Labor in Sri Lanka's Estate Sector', World Bank publication, p.7. See also: A. Wickramasinghe and D. Cameron (2005) 'Human and Social Capital in the Sri Lankan Tea Plantations: A Note of dissent', Culture beyond Universal and National Cultural Dimensions p. 10 http://www.mngt.waikato.ac.nz/ejrot/cmsconference/2005/proceedings/strategy/Wickramasinghe.pdf

73 E. Boserup (1970) ‘Loss of status under European rule’, in Women’s Role in Economic Development, Chapter 3, London: Earthscan Publications, pp 53–65. ‘European settlers, colonial administrators and technical advisors are largely responsible for the deterioration in the status of women in the agricultural sectors of developing nations. It was they who neglected the female agricultural labor force when they helped to introduce modern commercial agriculture to the overseas world and promoted the productivity of male labor.’

74 Ibid.

75 P. O. Ndege (1992) The Colonial State, Capital, Patriarchy and the Subordination of Women Traders in Western Kenya, Research Paper 9226, Department of History and Regional Research Institute, West Virginia University. ‘As the years wore on [women] would eventually even lose their position as owners, occupants and managers of property.’

76 International Labor Organization (ILO) (2009) Global Employment Trends for Women 2009, Geneva: ILO

77 See: SOFA Team & Cheryl Doss (2011).The role of women in agriculture, ESA Working Paper No. 11-02, FAO publication, p. 2 http://www.fao.org/docrep/013/am307e/am307e00.pdf

78 For example, in cocoa supply chains, see: UTZ CERTIFIED, Solidaridad and Oxfam Novib (2009) ‘The role of certification and producer support in promoting gender equality in cocoa production’, p.5 http://api.ning.com/files/zKGtTtKz5rpxD*9tNGabeaIhAHvB1Cbk6qH*Ixh145eMOdc22y2DNq61l5eDFpNh0pMTu0Zw-E64DPQ*GqKljLtemFTJJV7H/CocoaGenderreport_UTZSolidaridad.pdf

79 http://www.mars.com/global/about-mars/mars-pia/our-approach-to-business/climate-change.aspx

80 Environmental Protection Agency, US Government, http://epa.gov/climatechange/ghgemissions/global.html Agricultural activities accounted for 14 percent of 2004 emissions, ‘land use change’ was 17 percent of emissions, including deforestation and land clearing due to agriculture, and transportation. Also, food production accounts for up to 29 per cent of man-made greenhouse gases, twice the amount the United Nations has estimated comes from farming, from CGIAR report ‘Climate Change and Food Systems’

81 A. Eitzinger, K. Sonder and A. Schmidt (2012) ‘Tortillas on the Roaster: Central American Maize-Bean Systems and the Changing Climate’, Catholic Relief Services, International Center for Tropical Agriculture and International Center for Improvement of Maize and Wheat, http://www.crsprogramquality.org/storage/pubs/agenv/climate-change-maize-beans-summary.pdf

82 IFRPI, Global Food Index, p. 31, http://www.ifpri.org/sites/default/files/publications/ghi12.pdf

83 Palm oil is especially emblematic of this trend. See: http://worldwildlife.org/industries/palm-oil Accessed 22 November 2012

84 http://www.gpo.gov/fdsys/pkg/PLAW-111publ203/html/PLAW-111publ203.htm

85 http://nikeinc.com/pages/manufacturing-map

86 Carbon Disclosure Project, ‘Collective responses to rising water challenges’, https://www.cdproject.net/en-US/Pages/HomePage.aspx (last accessed November 2012).

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88 For example, the GRI does not require food and beverage companies to provide comprehensive information on the social impacts of agricultural operations. Similar gaps can be found across other sectors.

89 The UN Guiding Principles on Business and Human Rights represent the culmination of various initiatives aimed at defining the human rights responsibilities of corporations. They are supported by the OECD Guidelines on Multinational Enterprises, the ILO Tripartite Declaration on Multinational Enterprises and Social Policy, the UN Global Compact, the European Union Strategy for Corporate Social Responsibility, the International Finance Corporation Performance Standards, and various multi-stakeholder and industry initiatives, all reinforcing the basic principle that corporations must not infringe human rights – including labour rights, non-discrimination, and rights to health, water and food.. See: J. Ruggie (2012) ‘The Corporate Responsibility to respect Human Rights’, United Nations publication p. 1, see http://www.ohchr.org/Documents/Publications/HR.PUB.12.2_En.pdf. There are three

core principles: 'The first is the State duty to protect against human rights abuses by third parties, including business enterprises, through appropriate policies, regulation, and adjudication. The second is the corporate responsibility to respect human rights, which means that business enterprises should act with due diligence to avoid infringing on the rights of others and to address adverse impacts with which they are involved. The third is the need for greater access by victims to effective remedy, both judicial and non-judicial.'

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92 http://en.wikipedia.org/wiki/John_Harvey_Kellogg

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95 http://www.rspo.org/en/member/662

96 http://www.abf.co.uk/documents/pdfs/2010/2010_corporate_responsibility_report.pdf

97 See: http://twinings.co.uk/media/173171/two_code_of_conduct.pdf

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100 http://www.generalmills.com/Media/NewsReleases/Library/2012/April/CSRReport.aspx?p=1

101 http://www.ifpri.org/ghi/2012/sustainable-food-security-under-land-water-energy-stresses

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129 FAO (2011) 'The State of Food and Agriculture 2010–11 – Women in Agriculture: Closing the Gender Gap for Development', http://www.fao.org/docrep/013/i2050e/i2050e00.htm

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133 www.ifad.org/operations/food/farmer.htm

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136 See: http://www.ilo.org/wcmsp5/groups/public/@dgreports/@dcomm/@publ/documents/publication/wcms_155428.pdf

137 ILO (2012) 'Agriculture; plantations; other rural sectors', http://www.ilo.org/global/industries-and-sectors/agriculture-plantations-other-rural-sectors/lang--en/index.htm (last accessed November 2012).

138 http://www.oxfam.org/policy/people-centered-resilience

139 Climate Change and Food Systems. Annual Review of Environment and Resources. Vol. 37: 195-222 (Volume publication date November 2012)

140 The number of reported land deals by foreign investors in agriculture in the global South increased from around 35 in mid-2008 to 105 in mid-2009. See K. Geary (2012) op. cit.

141 http://www.unwater.org/statistics_use.html

142 http://www.unwater.org/statistics_sec.html.

143 http://www.unglobalcompact.org/issues/environment/ceo_water_mandate/

144 For example, Unilever and Nestlé have not: committed to ensuring land tenure security for impacted security, committed to free, prior and informed consent for all communities (or only affected communities), declared zero tolerance for land grabbing in company operations, subjected all agricultural activities to free, prior and informed consent for all land rights users or included a 'stop land grab' clause in their supplier code.

145 Unilever has communicated to Oxfam that: 'One of the elements in our Sustainable Agriculture code is that all of our suppliers must provide us with proof of their land ownership, so that we know it's not in dispute. We have been supporting calls for action on this issue at an international level through the G20 (we co-chaired the Food Security Working Group) and we're also supporting the FAO's Committee on World Food Security (CFS) voluntary guidelines on land tenure.'

146 http://kelloggcorporateresponsibility.com/sustainable-agriculture/supporting-community-development

147 http://www.sucre-ethique.org/IMG/pdf/Sugarcane_and_the_Global_Land_Grab-2-2.pdf

148 http://www.generalmills.com/Home/Responsibility/Sourcing/palm_oil_statement.aspx

149 Kellogg Company 2011 Corporate Responsibility Report, p. 96 http://www.kelloggcorporateresponsibility.com/pdfs/2011_Kelloggs_CRR.pdf

150 Oxfam is also a member of the RSPO. Oxfam believes that working within the RSPO, despite the challenges, can help to create meaningful change in palm oil production worldwide.

151 See Responsible Sourcing Guidelines: Framework for Forest-based materials at http://www.nestle.com/asset-library/Documents/Media/Statements/2012-October/Nestl%C3%A9%20Responsible%20Sourcing%20Guidelines%20for%20Forest-based%20Materials%20October%202012.pdf. This commitment for free, prior and informed consent is for forest-based materials, including soy and palm oil.

152 Much of this progress can be tracked with 7 out of the 10 companies disclosing information through the CDP Water Program for the last two years https://www.cdproject.net/CDPResults/CDP-Water-Disclosure-Global-Report-2012.pdf; https://www.cdproject.net/CDPResults/CDP-Water-Disclosure-Global-Report-2011.pdf. In 2013, water will be added to CDP's supply chain program and companies are just beginning to acknowledge indirect supply chain responsibility around water management. See www.cdproject.net/water.

153 The Coca-Cola Company, 'The Water Stewardship and Replenish Report 2012' pg 12–14

154 http://www.pepsico.com/Download/PepsiCo_Water_Report_FNL.pdf pg 3. Unilever conducts social impact studies in water-scarce areas but does not have a policy in place requiring community consultation on plans to develop water resources. See: http://www.unilever.com/sustainable-living/water/reducingwateruseinmanufacturing/

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156 Based on the documentary, 'Bottled Life – The Truth about Nestlé's Business with Water' by Swiss filmmaker Urs Schnell and journalist Res Gehriger, December 2011. See <http://www.youtube.com/watch?v=czfSwjx4yYA>

157 http://www.nestle.pk/brands/bottledwater/Pages/purelife.aspx

158 http://kinzulemaan.blogspot.hk/2011/06/marketing-strategy-of-nestle-nestle.html

159 http://www.bottledlifefilm.com/index.php/the-story.html

160 http://www.worldcrunch.com/poisoning-well-nestl-accused-exploiting-water-supplies-bottled-brands/business-finance/poisoning-the-well-nestl-accused-of-exploiting-water-supplies-for-bottled-brands/c2s4503/

161 www.nestle-waters.com/bottledlife.

162 www.nestle-waters.com/bottledlife. See also : http://www.worldcrunch.com/poisoning-well-nestl-accused-exploiting-water-supplies-bottled-brands/business-finance/poisoning-the-well-nestl-accused-of-exploiting-water-supplies-for-bottled-brands/c2s4503/

163 http://www.ilo.org/ipec/projects/global/tackle/madagascar/lang--en/index.htm

164 SOMO, Unilever overview of controversial practices 2010, May 2011, somo.nl/publications-en/Publication_3653/at_download/fullfile (19 July 2012) p. 6

165 In communications with Oxfam in 2012, Unilever stated that Symrise, a major German fragrance and flavour producer, commissioned an independent report and found no incidences of child labor in their supply chain.

166 SOMO, Unilever overview of controversial practices 2010, May 2011, somo.nl/publications-en/Publication_3653/at_download/fullfile (19 July 2012) p. 6.

167 For example, see Unilever Sustainable Living Plan Progress Report (2011), Nestlé Creating Shared Value Report (2011), http://www.mars.com/global/about-mars/mars-pia/our-supply-chain/cocoa.aspx and http://www.mondelezinternational.com/DeliciousWorld/sustainability/coffeemadehappy.aspx

168 The Women's Empowerment Principles were developed by the United Nations Development Fund for Women (UNIFEM, part of UN Women) and the United Nations Global Compact. The principles set out the business case for corporate action to promote gender equality and women's empowerment, highlighting cases of best practice. See United Nations Global Compact, 'Equality means business', http://www.unglobalcompact.org/issues/human_rights/equality_means_business.html (last accessed November 2012).

169 According to its website, 'WEConnect International, a corporate led non-profit, facilitates inclusive, sustainable economic growth by empowering and connecting women business owners globally. WEConnect identifies, educates, registers, and certifies women's business enterprises that are at least 51% owned, managed, and controlled by one or more women. WEConnect is making history by connecting women business owners to our corporate members that collectively represent over US$700 billion in annual purchasing power. See: http://www.weconnectinternational.org/

170 Oxfam solicited feedback from the top 10 companies by providing its own assessment of company policies and asking companies to provide feedback and their own data on publicly available policies that would improve upon Oxfam's own assessment. Multiple opportunities were provided to companies to respond to Oxfam's feedback in order to ensure accuracy.

171 http://www.actionaid.org.uk/doc_lib/48_1_competition_policy_wto.pdf

172 The failure to enforce existing laws that directly or indirectly regulate business respect for human rights is often a significant legal gap in state practice. Such laws might range from non-discrimination and labour laws to environmental, property, privacy and anti-bribery laws. It is important for states to consider whether such laws are currently being enforced effectively, and if not, why this is the case and what measures may reasonably correct the situation.'– Guiding Principles for Business and Human Rights, UN Human Rights Council, pg.8: http://www.ohchr.org/documents/issues/business/A.HRC.17.31.pdf

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174 Power hungry: six reasons to regulate global food corporations, Action Aid International p. 4. See http://www.actionaid.org.uk/_content/documents/power_hungry.pdf

175 S. Murphy et al. (2012) op. cit. This includes Glencore speculating on wheat prices, Bunge charged by the CFTC for manipulating trading in derivatives markets, plus less related to food are accusations of Dreyfus and cotton markets and ADM and lysine price fixing.

176 http://www.landcoalition.org/about-us/aom2011/tirana-declaration

177 For relevant ILO conventions, see: http://www.ilo.org/global/standards/introduction-to-international-labour-standards/conventions-and-recommendations/lang--en/index.htm

178 http://policy-practice.oxfam.org.uk/publications/exploring-the-links-between-international-business-and-poverty-reduction-a-case-112492

179 http://www.oxfamamerica.org/files/coca-cola-sab-miller-poverty-footprint-dec-2011.pdf

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