

DUTCH SUPERMARKET SUPPLY CHAINS

ENDING THE HUMAN SUFFERING BEHIND OUR FOOD

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Oxfam Novib
P.O. Box 30919
2500 GX The Hague
The Netherlands
+31 (0)70 3421621
info@oxfamnovib.nl
www.oxfamnovib.nl

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Cover photo: A woman farmer stands on a Tuzamurane Cooperative pineapple farm in Rwanda. She uses the income she makes from the cooperative to support her family. Photo: Aurelie Marrier d'Unienville.

This paper puts the findings of the global campaign report Ripe for Change in the Dutch context: R. Willoughby and T. Gore. (2018). Ripe for Change: Ending human suffering in supermarket supply chains. Available at: http://policy-practice.oxfam.org.uk/publications/ripe-for-change-ending-human-suffering-in-supermarket-supply-chains-620418

OXFAM

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INTRODUCTION

HUNGER AND POVERTY IN DUTCH SUPERMARKET SUPPLY CHAINS[1]

The Dutch supermarket sector is heavily consolidated, with the two largest supermarket chains controlling over 50% of the market.[2] Supermarket turnover has shown sustained growth over the past decade,[3] and life without almost daily supermarket visits is hardly imaginable for most Dutch consumers. At the same time, supermarkets are competing with each other fiercely in the battle for consumers. They try to attract customers by offering low prices for good quality food and a wide variety of options year-round. The growing dominance of supermarkets in the food sector in the Netherlands and elsewhere, through the use of this competitive model, has negative impacts on millions of farmers and workers who grow and process food under harsh conditions.

Oxfam commissioned new research for its Behind the Barcodes campaign, which is set out in the main campaign report *Ripe for Change*.[4] It included research into the distribution of value and power in food supply chains,[5] a Supermarkets Scorecard,[6] and a number of cases studies, including one focussed on seafood supply chains.[7]

The Oxfam research highlights abuses of fundamental human rights which are tied into the vast global value chains that supermarkets have come to rely on. It shows that cases ranging from forced labour[8] aboard fishing vessels in Southeast Asia, to poverty wages on Indian tea plantations and hunger faced by workers on South African grape farms are symptoms of systemic problems. Behind them all lies a supermarket business model that squeezes costs and passes the risks of production down to the women and men who produce and process our food, coupled with the weakening of the power of small-scale farmers and workers in many sourcing countries.[9] This paper looks at this data through a Dutch lens, detailing the reports' research findings most relevant to the domestic supermarket sector.

Behind the Barcodes builds on Oxfam's earlier work to fix the broken food system,[10] in which so many of those who produce our food are suffering and are going hungry. This includes the labour rights campaign launched in 2003, the Groene Sint campaign first launched in 2003, and the Behind the Brands campaign launched in 2013, which used public pressure to secure policy changes in the top 10 food and beverage companies. Since 2014, Oxfam's Even it Up campaign has been attracting worldwide attention to the growing global inequality crisis. Now we turn our attention to the role of supermarkets, on the premise that they can be a key player for change. The Behind the Barcodes campaign aims to harness the power of consumers, producers and workers to stand together to end the inhumane treatment of the women and men who produce our food. We call on Dutch supermarkets and the Dutch government to play their part by helping to end suffering in food supply chains, and ensure more of the money spent by consumers reaches those who produced the food.

We have not just stood on the sidelines and campaigned. Oxfam Novib has been at the forefront of innovation for more equitable, pro-poor business models. In the cocoa, palm oil, rice[11] and fisheries[12] sectors we have been working on both policy changes in board rooms – for example the recognition of land rights – and actual practice in the field in developing countries – for example to ensure the inclusion of small-scale farmers through participatory land-use planning.[13] In the palm oil sector, Oxfam combines these two approaches through its FAIR company–community partnerships, which aim to create exploitation-free and deforestation-free supply

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CASES RANGING FROM FORCED LABOUR ABOARD FISHING VESSELS IN SOUTHEAST ASIA, TO POVERTY WAGES ON INDIAN TEA PLANTATIONS AND HUNGER FACED BY WORKERS ON SOUTH AFRICAN GRAPE FARMS ARE SYMPTOMS OF SYSTEMIC PROBLEMS.

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chains with economic benefits for smallholder families and protection of community land rights.[14] We bring this experience to bear in our Behind the Barcodes campaign.

DUTCH SUPERMARKETS CAN DO MUCH MORE

Supermarkets show a growing awareness of the need to offer sustainably sourced products, but in light of the growing vulnerability of the current supply chain model there is much more they can and should do. Oxfam's Supermarkets Scorecard, presented in the next section, shows that the top five Dutch retailers do not have the systems and policies in place to ensure the necessary levels of transparency, accountability and due diligence that could help them prevent, mitigate and address human rights issues in their supply chains. In the short term, supermarkets benefit from their dominant positions by using business practices that cause their suppliers – and ultimately farmers and other food producers – to give them low prices as well as other advantages.

However, in the long run, food producers may no longer be able to cover their costs if current trends continue.[15] Farmers with perishable, fresh products that they have to sell quickly have particularly weak negotiating positions. It has become increasingly difficult for food producers to meet their basic needs, let alone invest in economically feasible, sustainable and innovative production or to meet the growing challenges of climate change. Labour conditions and the environment, as well as the quality and diversity of our food production, will increasingly be threatened if no steps are taken.

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'THE PERFORMANCE OF RETAIL COMPANIES [IN RESPECT OF SUSTAINABILITY CONCERNS] IS LAGGING BEHIND SOCIETAL EXPECTATIONS.'

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Willem Lageweg, former director of MVO Nederland, as quoted by Dutch media in June 2016[16]



Fruit and vegetables at a supermarket. Photo: Shutterstock

1 HOW THE BIGGEST FIVE SUPERMARKETS IN THE NETHERLANDS RANK

SUPERMARKETS SCORECARD BACKGROUND

Oxfam's experience has taught us that when it comes to analysing responsible business practices, company policies and reported practices are a good starting point and indicator of progress.[17] Transparency about a company's corporate governance, human rights policies, processes and plans, and about its supply chain has proven to be a meaningful indicator of its direction of travel. And Oxfam has also found that the more transparent companies are about these policies and practices, the more likely they will be to follow through on commitments.

Oxfam's Supermarkets Scorecard shows where companies stand on four key aspects of supply chain management and analyses the steps they have taken to ensure that rights are respected and people treated fairly. The four categories are: transparency and accountability, workers, farmers, and women. It gives the general public, including shareholders, consumers and suppliers, the information they need to hold supermarkets to account for how they source their products. It also gives workers, small-scale producers and their representatives and advocates useful information on the commitments made by the companies they supply to.

Oxfam in Germany, the United Kingdom and the United States also assessed some of their biggest supermarkets. In each case, we awarded scores for each relevant policy or practice the company disclosed, and gave partial scores for policies that applied to one of the company's subsidiaries rather than the whole company. Oxfam believes that supermarkets should take responsibility for the social and environmental impacts of all the products they sell. In many cases, their leverage to achieve change in their supply chains in this regard is likely to be higher with respect to their own brand products as opposed to premium brands. However, in assessing the supermarkets' performance against the indicators, Oxfam has taken into account a company's policies concerning all the products they sell, regardless of whether these are premium products or own brand brands.

Results are presented in the global Supermarkets Scorecard.[18] We will repeat the scoring on a yearly basis, while engaging with the supermarkets, which will provide all assessed companies with an opportunity to show the progress they are making.

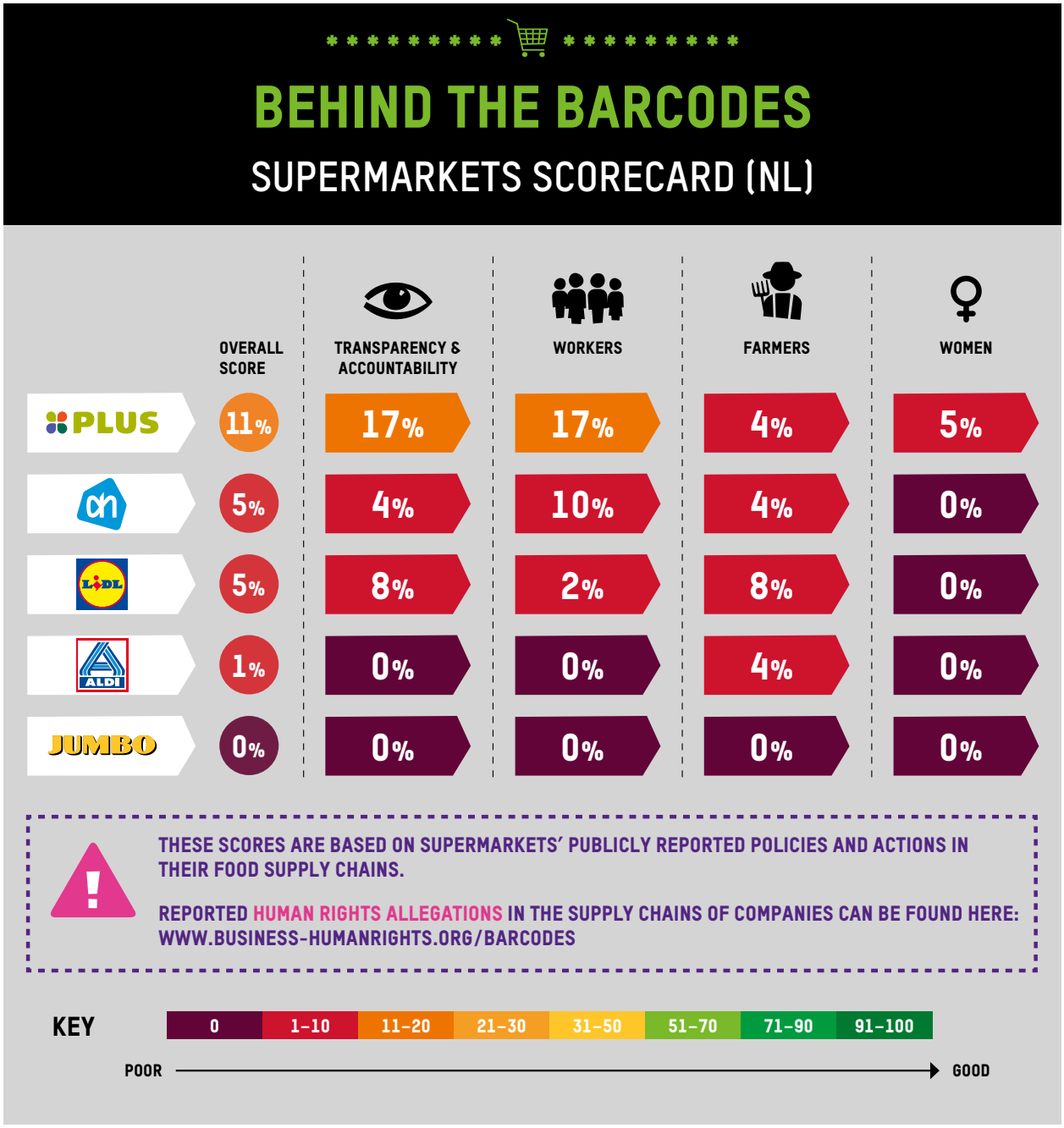
Oxfam bases its assessments of supermarket policies and practices only on publicly available information. We are not asking for any sensitive information which could put vulnerable people or commercial relationships at risk. But the public has an increasing interest in knowing what efforts companies are making to ensure that rights are respected, including in highly challenging contexts, to maintain their trust in companies.

KEY FINDINGS

The Dutch Supermarkets Scorecard looks at the five supermarkets in the Netherlands with the largest turnover. Combined, they represent more than three-quarters of the Dutch retail market share. Ahold Delhaize is the parent company of the Dutch supermarket chain Albert Heijn, and of 20 other local brands active in different countries across the world, including Belgium and the US.[19] In assessing Albert Heijn's performance against the indicators, Oxfam took into account the policies of both Albert Heijn and those of its mother company Ahold Delhaize. Throughout the rest of this paper, we refer mainly to Albert Heijn, as this is the entity best known in the Dutch context, except in those cases where the statements are solely applicable to Ahold Delhaize.

The scores of these Dutch supermarkets point to the urgent need for companies to identify and address significant risks commonly found in their supply chains.

FIGURE 1: DUTCH SUPERMARKETS SCORECARD



OVERALL RETAILER SCORES

Most retailers assessed achieved very low scores across all the issues. In the Netherlands particularly, despite the efforts Dutch supermarkets are making to convince consumers they are sourcing sustainably, Oxfam's Scorecard suggests that the assessed retailers can do much more to meet international standards and societal expectations of business. A number of supermarkets in the UK and the US, specifically Tesco, Sainsbury's and Walmart, are further advanced on a number of the issues assessed. The total score of the highest performer Tesco is more than double the score of Dutch leading supermarket PLUS, although there is plenty more that even these better-performing foreign companies can do.

Among the five largest Dutch supermarkets, none yet has the systems and policies in place to fulfil its responsibilities. There is an urgent need to improve traceability, due diligence, business practices and advocacy to address significant risks commonly found in their supply chains. No Dutch supermarket achieved more than 10 of a possible 93 points (11%) against Oxfam's indicators of good practice.[20] PLUS scored the highest overall,[21] followed by Albert Heijn and Lidl. Aldi[22] achieved a very low score, and Jumbo scored no points at all.

None of the companies scored at all on a range of indicators including supporting grievance mechanisms for workers or small-scale producers, supporting living wages or income,[23] tracing or supporting their suppliers and measuring their impact on human rights.

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NO DUTCH SUPERMARKET ACHIEVED MORE THAN 10 OF A POSSIBLE 93 POINTS (11%) AGAINST OXFAM'S INDICATORS OF GOOD PRACTICES.

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ANALYSIS BY KEY THEMES

Transparency and accountability

Dutch retailers have yet to demonstrate commitments against Oxfam's indicators of transparency and accountability. PLUS scores the highest across this theme, with a 17% score, and is the only Dutch supermarket that has made an explicit commitment to the UN Guiding Principles on Business and Human Rights (UNGPs) and to regular reporting against them. Lidl gets a partial score on this because its UK subsidiary makes this commitment. By committing to sourcing only Fairtrade for own brand products where this is possible – a form of choice editing – PLUS also shows they give preference to suppliers which demonstrate a commitment to the wellbeing of workers, small-scale producers and women. Lidl scores on the same indicator thanks to its efforts to promote Fairtrade products, including marking the whole of 2016 as 'Fairtrade Year' in Germany.[24] Only Albert Heijn and PLUS name the senior executive responsible for ensuring that human rights are respected. Lidl does so only for its UK operations and therefore gets a partial score for this. Retailers do not disclose the names and locations of suppliers of high-risk food products, which is necessary to support effective risk assessment and grievance mechanisms.

What more should companies do to be transparent and accountable in their supply chains?

- Adopt a robust due diligence framework which goes beyond an audit-based approach
- Actively manage human rights risks and ensure effective grievance mechanisms and remedy for harm
- Track and disclose information about product supply chains, pay ratios and gender wage gaps.



Women farmers in Southern Africa sort bananas.
Photo: Abbie Trayler-Smith/Oxfam

Workers

Dutch supermarkets generally scored very low on this theme. The highest score, 17%, was earned by PLUS, with Albert Heijn coming second at 10%. PLUS is the only Dutch supermarket that publicly recognizes the systemic nature of labour rights violations in global supply chains and the need to understand their root causes. Both Albert Heijn and PLUS have published labour rights policies in which they commit to the proactive prevention of forced labour: PLUS by committing to the Dhaka Principles and Albert Heijn through its membership of the Consumers Goods Forum. These two supermarkets also state the scope of their supplier codes of conduct. Lidl does so only for its operations in the US and therefore gets a partial score on this indicator.

Based on what they publicly disclose, none of the companies score on supplier engagement, human rights impact assessments, freedom of association, living wages and value distribution and sourcing practices.

What more should companies do for workers?

- Assess the impacts of supply chain activities on workers
- Proactively engage trade unions and ensure no intimidation of workers in supply chains for wanting to organize and bargain collectively
- Take action to close gaps between current wages and a living wage

Farmers

The general score of Dutch supermarkets on disclosing their commitment to supporting the rights of small-scale producers, including on supporting women – the most vulnerable members of their supply chain – is very low. Lidl obtained the highest score of 8%. The others, except Jumbo, all followed with a score of 4%. All retailers except Jumbo earned some points for good sourcing practices by sourcing Fairtrade certified products across at least three high-risk food categories. Lidl was the only one to score on making the explicit commitment to supporting small-scale producers in its food supply chains.

What more should companies do for small-scale producers?

- Assess the impacts of supply chain activities on small-scale producers and take account of women's different needs
- Implement sourcing practices that mean small-scale producers get a fair deal
- Engage in advocacy with public authorities so they provide the support that small-scale producers need

Women

All supermarkets assessed performed extremely poorly on this theme. PLUS is the only Dutch supermarket to score, and only with 5%, based on its commitment to buy more products of which they know the producers or processors are women, where commercially viable. The low scores on this theme demonstrate a lack of understanding of the systemic barriers women face in global food supply chains and the need for proactive action to address these. None of the assessed companies can show that they pay attention to the unique obstacles women may face based on their gender or demonstrate expectations that their suppliers have gender-sensitive policies and practices.

What more should companies do for women?

- Implement the UN Women's Empowerment Principles, co-created with business sector representatives
- Track and disclose information on women's roles and remuneration
- Take action to assess and improve the impact of supply chain activities on women, including through supply chain partnerships and advocacy to governments

2 DUTCH SUPERMARKET POWER AND THE DRIVE FOR CHEAP FOOD

DUTCH SUPERMARKETS' CENTRAL ROLE IN THE LIVES OF PRICE-ORIENTED CONSUMERS

Supermarkets play a central role in the daily lives of Dutch consumers. Every day, 4 million consumers (out of a population of 17 million) visit a supermarket.[25] The Netherlands has about 4,300 supermarkets,[26] which are largely in the hands of 14 different supermarket chains.[27] Supermarkets provide jobs to a total of 300,000 employees[28] and are therefore one of the largest employers in the Dutch economy. The total food retail sector has an annual turnover of €56bn, representing about 10% of Dutch GNP.[29] Supermarkets sell 51% of all the food and drink consumed in the Netherlands[30] and generally have a good reputation among Dutch consumers.[31] The share of supermarkets in the retail sector is expected to grow, mostly to the detriment of specialized retail stores.[32]

Consumer prices for groceries are very low in the Netherlands, while the quality is high.[33] Food prices are in fact the lowest in Western Europe: prices are 2% below the EU average, while all consumers in other Western European countries pay prices above that average.[34] The proportion of income that Dutch consumers spend on their food has persistently decreased over the past decades, from about 25% in 1969 to an average of 11% in 2015.[35]

CONCENTRATION IN THE DUTCH RETAIL SECTOR

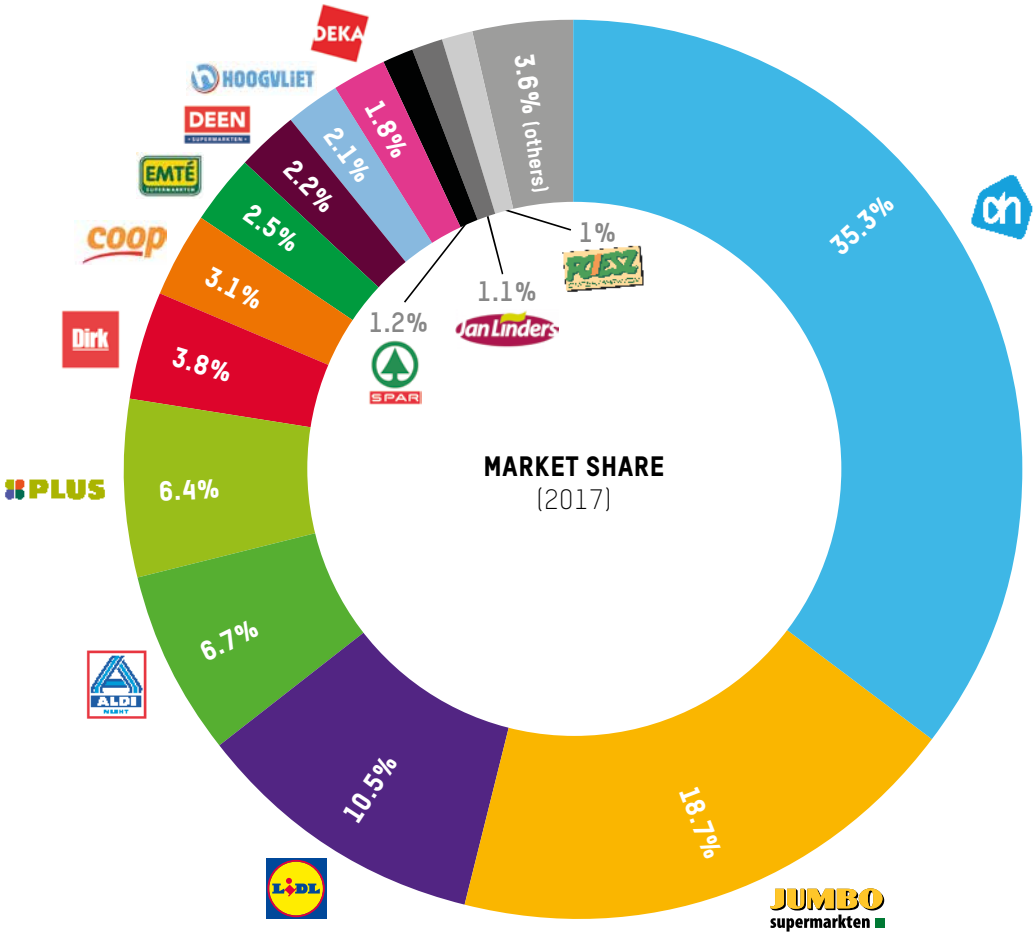
Owing to a process of ongoing expansion, concentration and consolidation, the Dutch retail market can be described as an oligopoly – a market structure in which a small number of firms has the large majority of market share – with just five retailers controlling over 77% of the market (Figure 2).[36] Albert Heijn is the Dutch market leader, with a market share of 35.3% in 2017. The second largest supermarket, Jumbo, is around half the size of Albert Heijn, with a market share of 18.7%. In third and fourth positions are the two German discounters, Lidl and Aldi, controlling respectively 10.5% and 6.7% of the market. PLUS holds fifth place, with a 6.4% share.[37]

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THE DUTCH RETAIL MARKET CAN BE DESCRIBED AS AN OLIGOPOLY – A MARKET STRUCTURE IN WHICH A SMALL NUMBER OF FIRMS HAS THE LARGE MAJORITY OF MARKET SHARE.

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FIGURE 2: A SMALL NUMBER OF DUTCH SUPERMARKETS HOLD THE MAJORITY OF THE MARKET SHARE (2017)



Source: Figure created by Oxfam using 2017 data from: Distrifood (2018). Market shares 2007-2017 Nielsen. Retrieved from: http://www.distrifood.nl/service/marktaandelen/

The Dutch supermarket sector consists mainly of non-listed and often family-owned Dutch businesses. Albert Heijn is the exception: through its holding company, Ahold Delhaize, it is the only large Dutch supermarket chain listed on the stock markets.[38] Ahold Delhaize, Lidl and Aldi (both German) also operate internationally, while the others do not have shops outside the Netherlands.

Reacting to the fierce competition in the European retail market, further concentration of buying power has been observed in recent years, both on the side of the retailers and on the supply side. On the retailers' side, the acquisition of C1000 by Jumbo in 2012 and the merger between Ahold and Belgian Delhaize are notable. In March 2018, Emté supermarkets was sold to a consortium of Jumbo and Coop.[39] It is expected that this will bring Jumbo to a market share of over 20%.[40] Independent food retailers are increasingly leaving the scene – a trend accelerated by shrinking margins and ongoing consolidation of the retail market.

As recently demonstrated in the report Eyes on the Price by the Centre for Research on Multinational Corporations (SOMO),[41] this concentration of buying power is further reinforced by the use of buying alliances (either operating at national or European level) among retailers. These enable them to coordinate their procurement across borders and obtain the lowest possible prices for premium brands or for supermarkets' own brand groceries. A typical example is Superunie, which buys for 13 supermarket chains in the Netherlands, including PLUS.[42] Many Dutch

supermarkets are increasingly 'vertically integrated' – that is, following a strategy where they expand their business operations into different steps of the same production path[43] – as illustrated by the trend of focusing on a reduced number of suppliers and developing longer term business relationships with these suppliers.

These ever-larger retailers and buying groups mean suppliers have fewer alternatives for offering their products, and thus see their negotiating position weakening.[44] At the same time, competition and price pressures also lead to consolidation among suppliers; for example, in the fruit and vegetables sector, the merger of Greenyard and Univeg led to the creation of the largest fruit and vegetables supplier to Dutch supermarkets.[45] Further consolidation is expected, based on the capacity of the larger supermarkets to offer online shopping services.[46]

PRICE WARS, OWN BRANDS AND THE RISE OF THE DISCOUNTERS

The Dutch retail sector is under pressure to adapt to new trends. Globalization and digitalization have led to new business models and players popping up, such as online grocery shopping and competition from 'meal kit' delivery services like Hello Fresh. Combined with an increasing demand for healthy and sustainable products – and with the economic crisis a thing of the past for many consumers – these trends can both represent opportunities and threats to retailers.

The recent growth of the so-called 'quality discounters', Aldi and Lidl, has put pressure on other supermarkets to cut prices. The German stores' formula is to ensure that the customers' basic needs are provided for by selling products at the lowest possible price. Service is relatively limited and prices are kept down thanks to a smaller product range, a restricted offer of branded goods and cost-efficient management, among other things. Lidl is the supermarket chain that has recently grown the most in the Netherlands, with its 7.5% market share in 2012 rising to over 10.5% in 2017. Its increased popularity in the Dutch market was one of the drivers of a steep increase in the growth of supermarkets' own brand labels – products (especially basic items) which are packaged and marketed by supermarkets under their own name – which grew from 19.2% in 2003 to 27.3% in 2013.[48] While considerable, the growth in own brand products was less than predicted by sector analysts, e.g. from Rabobank.[49] As of 2014, the share of own brand labels in the Netherlands was above the global average, but well below levels in Switzerland, the UK and Spain, where the share was above 40%.[50] While a recent drop in growth of own brands[51] has cast some doubt about further growth, most publicly available analysis expects the market share of own brands to increase further to around 50% in 2025, mainly due to price pressures from Aldi and Lidl.[52]

In recent years, retailers in the Netherlands have been involved in particularly heavy competition, with prices lowered in a bid to win the favour of Dutch consumers in a saturated market. In the Netherlands, these so-called 'supermarket wars' or 'price wars' have been criticized, for example by Dutch farmer organization Land- en Tuinbouw Organisatie Nederland (LTO), for having a negative effect on suppliers, as 'the burden of lower consumer prices is one-sidedly shifted from retailers to suppliers'.[53] In 2014, various retailers, including several Superunie members, reduced the prices of hundreds of products, reacting to earlier moves by Albert Heijn to drop prices for a large number of mostly branded products. Albert Heijn made its most significant discounts on beer, pasta and rice, Asian products and soft drinks.[54]

Price wars are increasingly fought with own brand products, as supermarkets use them to compete with discounters. Supermarkets are perceived to be driven by the concern that consumers will do their daily shopping in discounters, and only visit conventional supermarkets when they want to buy special or branded products.[55]

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PRACTICALLY ALL PRODUCTS HAVE TO PASS THROUGH SUPERMARKETS, SO THEY HAVE AN IMMENSE AMOUNT OF POWER. FARMERS THEREFORE ONLY COMPETE ON PRICE AND FOCUS ON THE SHORT TERM, AND NOT ON SUSTAINABILITY. THERE IS A COMPLETE IMBALANCE IN THE RELATIONSHIP.

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Michael Wilde, Communications and Sustainability Manager, Eosta, June 2017 [47]

Consequently, retailers like Albert Heijn or Jumbo[56] are reducing the prices of their own brand products to levels almost as low as Aldi and Lidl prices.

The price wars between the Dutch supermarkets continued in 2017. This is illustrated by media reports from October 2017 that Jumbo had reduced prices of 100 products, in reaction to research findings stating that consumers perceive Jumbo to be more expensive than its competitors.[57] Dutch retail experts predict that as a result of these price wars, along with smaller players' inability to compete in the online market, in the long run the smaller retailers are likely to disappear altogether from the Dutch retail landscape, further concentrating the power of supermarkets.[58]

Overall, the food retail industry in the Netherlands is a powerful and influential sector. It finds itself in a strategic position, in that it has the potential and the responsibility to make value chains more environmentally and socially sustainable, and to influence consumer choices. After all, it is supermarkets that connect consumers with the producers and suppliers behind the food they buy.[60] So far, Dutch supermarkets have not lived up to that responsibility or potential. Supermarkets are powerful players, but so far, it seems they have failed to take the responsibility that comes with this power. Dutch supermarkets denied that they abuse their market power and have publicly spoken out against the need for European legislation regarding unfair trading practices.[61] Consumers, on their side, can incentivize supermarkets by paying attention to what they buy and ask for more sustainable products.

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'FARMERS PAY THE BILL WHEN SUPERMARKETS FORCE LOWER PRICES ON US. TOGETHER WE WANT TO PRODUCE AND CONSUME SUSTAINABLE FOOD, BUT THAT'S NOT POSSIBLE FOR LOWER PRICES.'

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Eric Huber, Chairman department poultry farming, LTO, October 2017[59]



Coffee beans growing in Central America. Photo: Donna Morris/ Oxfam America

3 HOW SUPERMARKETS USE THEIR POWER TO PUT PRESSURE ON SUPPLIERS

Vertical integration and the consolidation of purchasing power, as described above, has enabled Dutch supermarkets to achieve ever-growing power in food supply chains. A review of recent and publicly available reports indicates how Dutch supermarkets are able to impose their will and commercial interests in their dealings with their suppliers.

WHEN CONTRACT CONDITIONS DON'T MEAN MUCH

In a well-publicized example of the use of power by Dutch supermarkets, in August 2016 the freshly merged Ahold Delhaize requested from its largest suppliers a retrospective change in the contract conditions, including an 'integration bonus' that the suppliers had to pay.[62] During Oxfam Novib's engagement with Ahold Delhaize, they explained that Ahold and Delhaize had different contracts with their suppliers before the merger, each with different buying conditions. They spoke to their large multinational suppliers and asked them to explain the difference in buying conditions. According to Ahold Delhaize, oftentimes these discussions resulted in alignment of these conditions. In the media, Ahold Delhaize justified the move as 'a natural moment to talk with about 100 major suppliers of Ahold Delhaize in the Netherlands and Belgium. Instead of two companies with their own agreements with suppliers, we are now one company.'[63] However, the company's suppliers were concerned about the move and the Dutch Agricultural Union (Nederlandse Akkerbouw Vakbond) labelled it 'a classic example of unfair trading practices'.[64] Ahold Delhaize provided reassurance to the union that the Dutch farmers would not suffer any negative consequences as a result of the contract change.[65]

In the meantime, the umbrella organization of Dutch food producers (Federatie Nederlandse Levensmiddelen Industrie, FNLI) attempted to file a complaint against Ahold Delhaize under the Dutch pilot for a Code of Conduct for Fair Trading Practices in Agriculture and Food.[66] However, due to the lack of a complaint mechanism within the code, the complaint was dropped. As Philip den Ouden, FNLI director at the time, explained: 'It soon became apparent that the Code of Conduct for Fair Trading Practices in Agriculture and Food does not contain a good complaints mechanism, therefore we've dropped our complaint. We are now investigating if such a mechanism could still be built.'[67]

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A REVIEW OF RECENT AND PUBLICLY AVAILABLE REPORTS INDICATES HOW DUTCH SUPERMARKETS ARE ABLE TO IMPOSE THEIR WILL AND COMMERCIAL INTERESTS IN THEIR DEALINGS WITH THEIR SUPPLIERS.

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VERY PUBLIC SUPERMARKET–SUPPLIER DISPUTES

The reaction of the FNLI director seems to reflect how suppliers of the supermarkets react when confronted with pressure from the powerful Dutch retailers. They are generally reluctant to publicly complain about business conflicts. Most often they resolve these conflicts behind closed doors.[68] However, some of these conflicts do spill over into the public domain.

In 2016, Volkert Engelsman, CEO of Eosta – one of the largest Dutch suppliers of organic fruit and vegetables – accused the Dutch supermarkets in the media of 'criminal behaviour'. He indicated that while it is a public secret that the sale of potatoes, vegetables and fruit deliver the highest margins of all products on the

shelves, 'the producers do not profit. They get played off against each other by the retailers in a race to the bottom.'[69] The Eosta CEO was particularly critical of Albert Heijn, saying: 'Transparency, showing consumers where the products on the shelves come from, is seen by Albert Heijn as life-threatening.'[70]

As recently as August 2017, the Dutch press also reported a 'business conflict' between Albert Heijn and the French cheese producer Bel Group,± owner of the brands Leerdammer, Boursin, La Vache Qui Rit (The Laughing Cow) and Port Salut, among others. This resulted in all these cheese brands being removed from the shelves of Albert Heijn stores. Media reports speculated that the conflict related to the prices of the brands, but at the time of drafting this report, this is still unclear and it is not known whether and how the conflict has been resolved. In the retailer's online shop,[72] none of these products were on offer in the months following the conflict.

The larger the retailer, the more leverage it has to push prices down, especially if the products on offer are abundant. This is confirmed by Ekoplaza, one of the smaller Dutch retailers, which focuses on organic produce. In an interview in June 2017, the executive director of Ekoplaza explained that in times of scarcity most retailers are nice to their suppliers, but in times of plenty a 'race to the bottom' takes place, with retailers competing to offer the cheapest price. Discounters with an international presence, make use of their size, as the Ekoplaza representative explains: 'These are power games of which the consumer is not aware. This is not taking common responsibility, but focusing everything on price, even when others suffer from this.' [73]

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THE LARGER THE RETAILER, THE MORE LEVERAGE IT HAS TO PUSH PRICES DOWN, ESPECIALLY IF THE PRODUCTS ON OFFER ARE ABUNDANT.

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However, flexing their muscles in order to obtain lower prices is not only the prerogative of large supermarkets, as was demonstrated by a recent price-related spat between Dekamarkt – a supermarket with a share of less than 2% of the Dutch market[74] – and the international food giant Danone. The empty shelves from which the French concern's products were temporarily removed displayed a sign which candidly announced: 'We regret to inform you that the products Danone Oikos Peach Yoghurt and Danone Oikos Strawberries Yoghurt are currently out of stock. This is the result of ongoing discussions about the price of these products. In order to guarantee our ability to offer you low prices in the future, we kindly request your understanding of this situation.'[75]

The power of Dutch supermarkets is not only limited to enforcing lower prices. A media report from 2016 tells the story of a product-delivery conflict between Jumbo and the Dutch beer producer Heineken. According to this report, the supermarket planned to sell Heineken beer in a seasonal offering, for which it needed one million extra boxes on top of the regular deliveries, with the costs to be supported by Heineken. When Heineken refused to adjust its production processes to accommodate this request, Jumbo initiated a PR offensive, including the publication of a full-page ad in Dutch newspapers to inform its consumers that: 'Heineken thinks that we are offering their beer too cheaply for a too long period of time. But we do not want to deprive you of this price reduction, therefore we will stick to our price policies.' Shortly thereafter, Heineken caved in to Jumbo's request and agreed to deliver the extra million boxes.[76]

In an earlier instance, Albert Heijn was sued by a group of its franchisees, who complained that the supermarket had unilaterally decided to no longer share the information and (more importantly) the bonuses that the retailer receives from its suppliers. The franchisees complained that Albert Heijn was refusing to share profits which the franchisees had helped the company to make, and also the purchasing advantages from its suppliers. The franchisees' lawyers attributed this change in Albert Heijn's behavior to 'the pressure of delivering to shareholders and the stock exchange' while 'delivering profit growth was becoming increasingly more important'.[77] In the ensuing case, the franchisees lost the complaint.[78] This example shows that how value is shared along supply chains is an issue in which all parties, including supermarkets, are ready to fiercely fight to protect their own self-interest.

4 GROWING INEQUALITY: THE RETAIL INDUSTRY AT A TIPPING POINT

The tough negotiations and occasional disputes between Dutch supermarkets and their European or Dutch suppliers give us a flavour of the challenges faced by the suppliers of globally traded commodities. This section focuses on how inequality in the supply chain affects the farmers, fishers, producers and workers behind these goods.

MORE VALUE FOR RETAILERS, LESS FOR PRODUCERS AND WORKERS

Oxfam commissioned research into the breakdown of value in the supply chains of several popular commodities in the Netherlands. The research looked both at the current breakdown and historical trends. The study for Oxfam by the Bureau for the Appraisal of Social Impacts for Citizen Information (BASIC)[79] concludes that across 12 products commonly sourced by supermarkets from across the world, on average small-scale farmers and workers only receive a marginal and steadily declining share of the end consumer price of their produce, often in the face of escalating costs of production.

The basket of commodities analysed in the study includes mostly tropical products: Colombian coffee, Indian tea, cocoa from Côte d'Ivoire, Thai rice, Vietnamese shrimp, Thai canned tuna, Brazilian orange juice, Ecuadorian bananas, South African grapes, Kenyan green beans, Peruvian avocados and Moroccan tomatoes. On average across this basket of products, the share of the end consumer price that reaches the small-scale farmers and workers producing them, has dropped from 10.2% in the mid-1990s to just 7.8% as of 2015 (see Figure 3), while the cost of inputs has more than doubled over the same period.

As shown in Figure 3, Dutch retailers, like supermarkets in other developed countries, on average capture the largest share of the end consumer price across the basket of products (43.8% in 2015).[80] This share has been fluctuating, but any reductions in the share of supermarkets appears to have worked only in favour of food manufacturers and traders, and never in favour of small-scale farmers or workers – illustrating how the latter are being squeezed in a highly competitive sector.

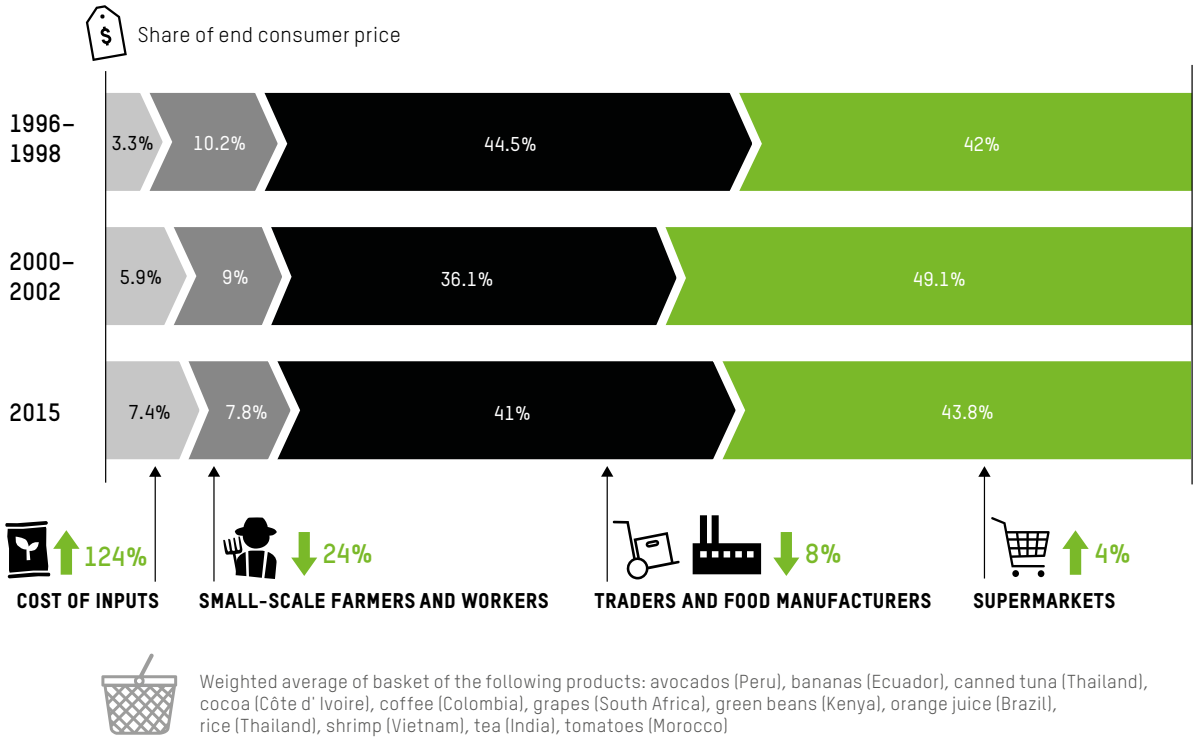
While the share of value should not be assumed to be equivalent to profits, this inequality in food supply chains acts as a powerful barrier to raising small-scale farmer incomes and worker wages to a decent level. At best, the skewed distribution means that it will take much longer for small-scale farmers and workers to achieve a living income or wage level. At worst, it traps the women and men in supermarket supply chains in poverty.

* * *

ON AVERAGE ACROSS THIS BASKET OF PRODUCTS, THE SHARE OF THE END CONSUMER PRICE THAT REACHES THE SMALL-SCALE FARMERS AND WORKERS PRODUCING THEM, HAS DROPPED FROM 10.2% IN THE MID-1990S TO JUST 7.8% AS OF 2015.

* * *

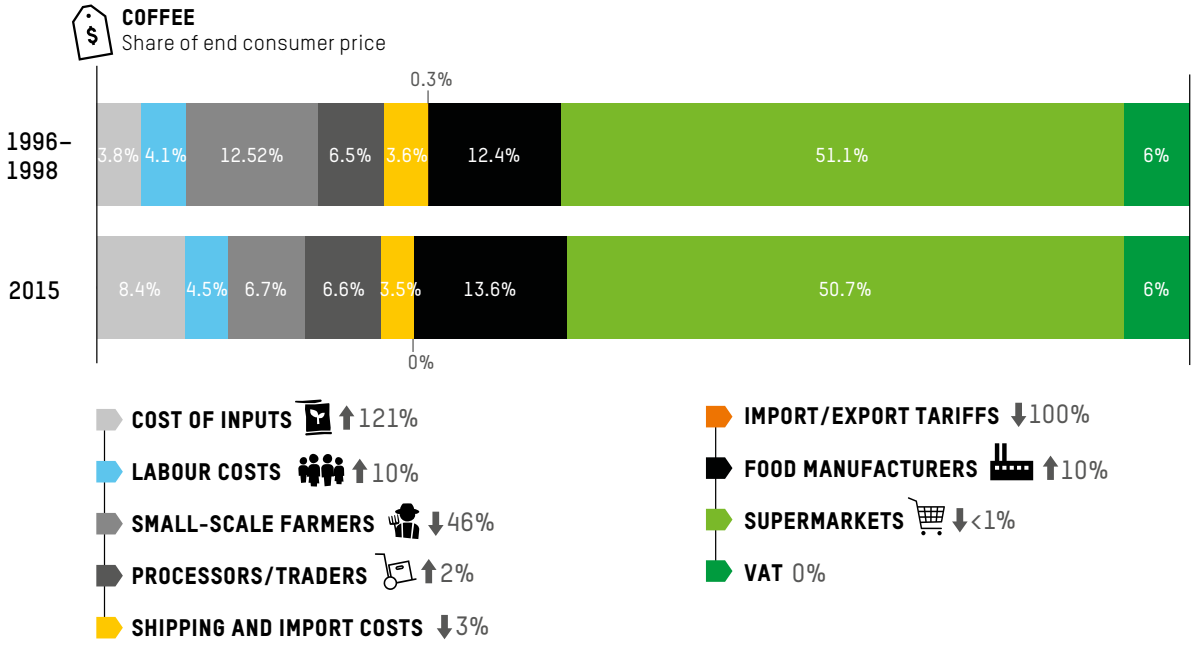
FIGURE 3: INEQUALITY IN DUTCH SUPERMARKET SUPPLY CHAINS IS PRONOUNCED



Weighted average of basket of the following products: avocados (Peru), bananas (Ecuador), canned tuna (Thailand), cocoa (Côte d' Ivoire), coffee (Colombia), grapes (South Africa), green beans (Kenya), orange juice (Brazil), rice (Thailand), shrimp (Vietnam), tea (India), tomatoes (Morocco)

Two product-specific examples demonstrate the challenges faced by small-scale producers. Firstly, in the value chain for coffee produced in Colombia and sold in the Netherlands, the analysis shown in Figure 4 found supermarkets have retained just over 50% of the total share of the end consumer price since the mid-1990s, which as for many other commodities, is by far the largest share of all the actors in the chain.

FIGURE 4: SUPERMARKETS CAPTURE THE LARGEST SHARE OF THE END CONSUMER PRICE FOR COFFEE PRODUCED IN COLOMBIA AND EXPORTED TO THE NETHERLANDS, WHILE THE SHARE FOR SMALL-SCALE FARMERS HAS FALLEN



Source for figures 3 and 4: C. Alliot et al. (Forthcoming). Distribution of Value and Power in Food Value Chains. Oxfam-commissioned research undertaken by BASIC.

At the other end of the chain, the share of the end consumer price left for actors in Colombia has stagnated at around 27% across this period. However, it is notable that the costs of inputs (such as fertilizers and pesticides) has more than doubled in this time, generating strong economic pressure on small-scale coffee farmers, whose share has been squeezed from 12.5% in the mid-1990s to just 6.7% in 2015.

Looking at the evolution of world market prices for coffee, supermarkets in the Netherlands appear to have 'cushioned' consumer coffee prices, with either small increases or prices that have remained relatively stable even when international coffee prices have fallen. A 'coffee paradox' has emerged in which, despite the relatively high and stable prices for consumers, coffee producers in Colombia have continued to struggle. BASIC's analysis indicated that in 2015, small-scale farmers in Colombia were selling their coffee at the same price, adjusted for inflation, as they were in 1991, only now in the face of significant increases in the costs of production.[81]

A similar picture emerges in the case of small-scale banana farmers in Ecuador, the source of 25% of bananas sold in the Netherlands.[82] In this example, represented in Figure 5, however, consumer prices in the Netherlands have fallen by around 20% in real terms since 1994. Supermarkets in the Netherlands nonetheless have captured the largest share of the end consumer price since 2011 of any actor in the chain, although it has declined from 36% in 2001 to around 32.2% in 2015.

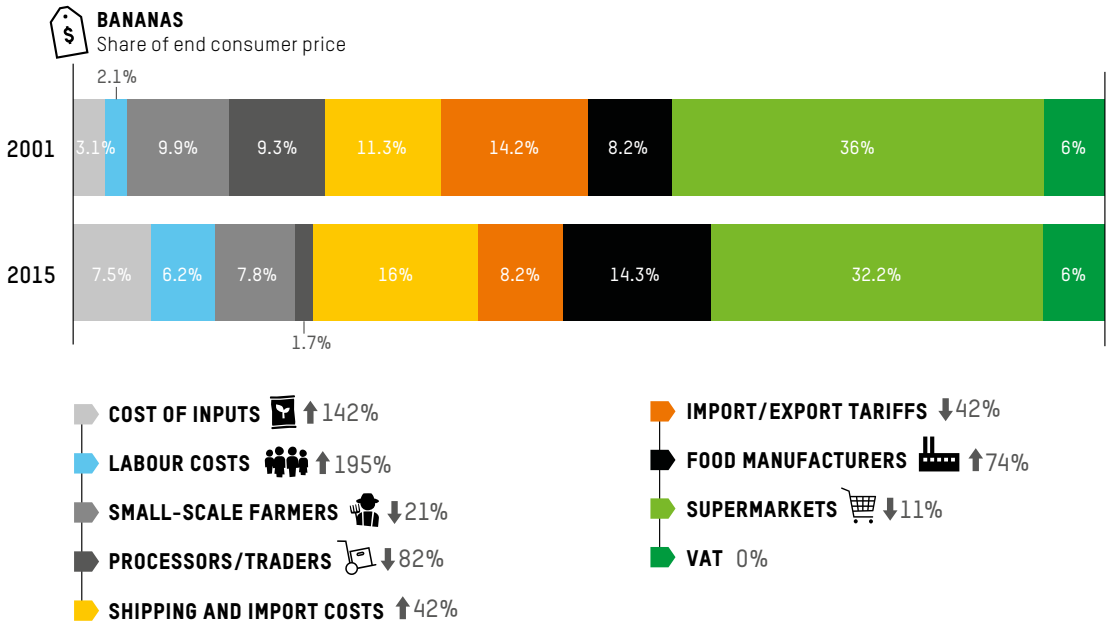
As in the case of Colombian coffee, though, at the other end of the chain small-scale farmers have struggled. The share left for producers in Ecuador has decreased from 9.9% in 2001 to just 7.8% in 2015, again in the face of sharply increasing costs of inputs that rose 144% in this time. While the share for banana workers (represented as 'labour costs' in Figure 5) appears to have improved – thanks largely to the steadily increasing minimum wage in Ecuador – evidence suggests that the cost of living has nonetheless risen faster than wages.

* * *

FOR SMALL-SCALE COLOMBIAN COFFEE FARMERS TO REACH A LIVING INCOME, THEIR SHARE OF THE END CONSUMER PRICE WOULD NEED TO BE INCREASED BY APPROXIMATELY €0.37/KG – WHICH ONLY REPRESENTS ABOUT 2.5% OF THE END CONSUMER PRICE OF COFFEE.

* * *

FIGURE 5: SUPERMARKETS CAPTURE THE LARGEST SHARE OF THE END CONSUMER PRICE FOR BANANAS PRODUCED IN ECUADOR AND EXPORTED TO THE NETHERLANDS, WHILE THE SHARE FOR SMALL-SCALE FARMERS HAS FALLEN



Source: C. Alliot et al. (Forthcoming). Distribution of Value and Power in Food Value Chains. Oxfam-commissioned research undertaken by BASIC.

What the experience of banana workers in Ecuador helps to show, however, is that food value chains such as these can deliver the value small-scale farmers and workers need to work their way out of poverty, if it is fairly distributed along the chain. Indeed, BASIC's analysis confirms that a living income for small-scale Colombian coffee famers, for example, requires their share of the end consumer price to be increased by approximately €0.37/kg – which only represents about 2.5% of the end consumer price of coffee. This increase would not have to be passed on to consumers, but could also be covered by redistributing value from other actors in the chain.

Supermarkets have increased their share of the end consumer price from €4.9/kg in 2010 to €7.5/kg in 2015 – that increase alone representing seven times the extra value small-scale farmers need to achieve a living income.[83]

Similarly, in the case of Ecuadorian bananas, small-scale farmers require an increase of just $0.03/kg of the end consumer price to bridge the gap to a living income. Even in the context of declining consumer prices for bananas, this represents less than 4% of the combined share of value retained by Dutch supermarkets and banana importers in 2015 – an amount low enough to suggest that living wages are not completely out of reach even in a chain with such pressure on consumer prices such as this.

Coffee from Colombia and bananas from Ecuador are just two examples of how the wages or incomes of small-scale producers, farmers and workers are squeezed when retailers do not take into account the effects of their quest for commodities at the lowest possible price. Similar trends in the distribution of the share of end consumer price to the ones for coffee and bananas can be seen for other commodities sold in Dutch supermarkets, such as shrimps from Vietnam and orange juice from Brazil.[84]

HUMAN RIGHTS ABUSES IN VALUE CHAINS OF GLOBALLY TRADED COMMODITIES

Several recent reports reveal human rights abuses in the value chains of globally traded commodities, some of which can be related directly to products that can be bought in Dutch supermarkets. The examples on the next two pages highlight human rights abuses in the orange juice, banana and shrimp value chains.

The descriptions of shrinking shares of end consumer price for producers of the globally traded food commodities sold in Dutch supermarkets, combined with case studies that show the detrimental impacts on farmers and workers, send a clear signal that the current retail model is reaching its limits. Supermarkets can do much more to play their part in addressing human rights abuses.

BOX 1: ORANGE JUICE CONCENTRATE FROM BRAZIL

Orange juice sold globally is often made from frozen orange concentrate. This 'raw material' is mainly sourced in Brazil (72% of this commodity comes from Brazil), where the entire process of growing, sowing, pressing, assembling and freezing takes place.[85] Around 420,000 people work in Brazilian orange concentrate production and almost 80% of the workforce are seasonal workers without any job security.[86] Labour conditions are very bad and cases of modern slavery and child labour have been found.[87] A 2013 report by German labour unions also shows that women are discriminated against at orange plantations: male employees generally have open-ended contracts, while most women have only fixed-term contracts. [88]

In a recent report, *Juice with a Bitter Aftertaste*, the Centre for Research on Multinational Corporations (SOMO) links three large Brazilian orange juice concentrate producers, which have all been fined for breaching workers' rights on their plantations and in their factories, to a number of Dutch supermarkets.[89] SOMO asserts that supermarkets in the Netherlands encounter significant risks of severe human rights violations and labour standard violations in their supply chains in Brazil and should take the responsibility for this.[90]



Production of orange juice in Brazil. Photo: Agência de Notícias do Paraná/Cocamar

BOX 2: BANANAS FROM LATIN AMERICA

The EU is the world's biggest importer of bananas, with the majority sourced from Latin America. After oranges, bananas are the second most consumed tropical fruit in the Dutch market.[91] Offering bananas at low prices forms an important strategy for supermarkets to attract customers. Research by the Make Fruit Fair campaign shows that real consumer prices for bananas have remained globally stable between 2001 and 2014 in most European countries. This is in stark contrast to the import price of bananas, which has dropped by 20% over the same period.[92]

The report, as well as Oxfam Germany's report *The Plight of Pineapple and Banana Workers in Retail Supply Chains*,[93] describes the sector's significant social and environmental impacts in most banana producing countries, including the denial of basic human rights, gender discrimination (including low levels of women's employment), a failure to pay living wages, the violation of trade union rights and long working hours. Workers are often poorly protected against the effects of the heavy application of toxic agrochemicals, suffering serious negative health impacts. The intensification of large-scale banana export production, often without ecological production practices, is causing the pollution of land, water courses and aquifers, harming local communities and reducing biodiversity.[94]

BOX 3: INDONESIAN AND THAI SHRIMPS

New research from Oxfam uncovered that primarily migrant and women workers at some of the biggest shrimp and other seafood exporters from Indonesia and Thailand face a number of serious labour rights issues.[95] Shrimps produced and processed under these conditions are also sold in Dutch supermarkets.

Across the sector a number of common problems were reported: sub-contracted employment and informal or temporary contracts; low pay, often based on piece-rates, and excessive working hours; and gender discrimination. Across Indonesia and Thailand, processing workers also reported unsafe, unsanitary and/or degrading working environments. Many workers reported that toilet breaks are tightly controlled and used as a form of discipline. For example, one group of workers in Thailand reported that only nine toilets were available for over 1,000 workers.[96] Some women workers in both countries gave examples of contracting urinary tract infections. Workers in Indonesia described not using the toilet for fear of a warning letter, verbal abuse from supervisors and because the lost working time meant they might not meet their quotas.

Many such practices are typical of the 'flexible' and 'feminized'[97] employment practices that supermarket suppliers around the world have tended to resort to as a means of cutting labour costs and/or responding to short-term changes in demand.



Former shrimp peeler in Indonesia. Photo: Adrian Mulya/Sustainable Seafood Alliance Indonesia

5 WHY CURRENT DUTCH POLICY INITIATIVES ARE INSUFFICIENT

While sustainability issues have increasingly received attention from the top Dutch retailers in recent years, leading to the development of policies and engagement on social and environmental responsibility, these efforts have not led to a systemic change. Retailers have clearly been influenced by the increased public scrutiny of their performance in relation to social and environmental standards, not least due to the public actions of various civil society organizations such as Milieudefensie, Greenpeace and Wakker Dier.[98]

However, as shown in the Supermarkets Scorecard, there are still significant policy gaps that need to be addressed, especially concerning transparency, due diligence, supplier management policies, labour policies, policies on engagement with small-scale producers, and an understanding and willingness to address gender inequalities in supply chains. Similarly, the public evidence – corroborated by Oxfam's own research – indicates that the trading practices used by Dutch supermarkets are tailored first and foremost to serve their commercial interests, resulting in pressure throughout their supply chains. As the cases described in the previous section show, vulnerable farmers, producers and workers are ultimately paying for the supermarket's quest for low prices.

* * *

THE PUBLIC EVIDENCE – CORROBORATED BY OXFAM'S OWN RESEARCH – INDICATES THAT THE TRADING PRACTICES USED BY DUTCH SUPERMARKETS ARE TAILORED FIRST AND FOREMOST TO SERVE THEIR COMMERCIAL INTERESTS.

* * *

THE FAILURE OF SELF-REGULATION

Despite ample public evidence showing that supermarkets use their power to impose unfair trading terms in their dealings with suppliers,[99] the Dutch regulators have so far been reluctant to undertake regulatory measures that would curb the power of supermarkets. Dutch governments of recent years have overwhelmingly favoured self-regulation in the food and beverage sector, including on unfair trading practices. At the European level, there was until recently equal reluctance to regulate the supermarket sector, but in August 2017 the European Commission took the first steps towards legislative action to address unfair trading practices in food supply chains.[100]

The Dutch government's reliance on self-regulation is exemplified by its satisfaction with voluntary efforts such as the European Supply Chain Initiative (SCI), to which the Dutch food sector (including all the large supermarkets) fully subscribes.[101] The Ministry of Economic Affairs' assessment, communicated in a letter to Parliament in April 2016, and based on conclusions provided by the industry itself, was that the SCI had been very successful in increasing the awareness of the Dutch industry regarding unfair trading practices, resulting in better practices and 'no recorded abuses at an aggregated level'. The letter implied that this was probably due to eventual individual complaints having been solved bilaterally before being reported.

The letter concluded that, due to the lack of complaints and because there had been no signals that unfair trading practices were in fact still occurring, there was consequently no need to initiate regulatory actions or to establish an independent institution to deal with complaints about unfair trading practices in the Dutch food sector.[102]

In response to the Ministry's letter, several Dutch NGOs, including SOMO and Oxfam Novib, expressed their deep concern about the dangers of the Dutch government's reliance on self-regulation. They also highlighted the shortcomings of the SCI, most importantly:

- The lack of an anonymous complaints mechanism, which is crucial in a sector with unequal power distribution;
- The fact that complaints can only be logged about registered buyers;
- The lack of financial or other sanctions to discourage buyers from adopting unfair trading practices;
- The fact that suppliers from outside the EU, notably small-scale farmers and producers from developing countries, do not have access to the mechanism;
- The lack of an authority with the mandate to do independent research.[103]

PROGRESS STALLS ON MULTI-STAKEHOLDER DIALOGUES

Besides self-regulation, policy makers in the Netherlands have in recent years also sought to establish multi-stakeholder approaches aimed at encouraging responsible business conduct. These include the Dutch government's initiative to bring about Sector Agreements on International Responsible Business Conduct (IMVO Convenanten). These agreements, based on advice from 2014 by the Social and Economic Council of the Netherlands (SER),[104] are meant to demonstrate the government's commitment to implementing several international agreements in the area of responsible business conduct, such as the OECD Guidelines for Multinational Enterprises, the UN Guiding Principles on Business and Human Rights, and the International Labour Organization (ILO) Conventions. The declared aims of the agreements are: 1) to achieve substantial improvements, within three to five years, for those who experience negative effects from the international activities of Dutch business; and 2) to support Dutch companies to solve those challenges collectively in their international activities that they cannot solve individually.[105]

These agreements are meant to bring together representatives from businesses, government, trade unions and NGOs in a multi-stakeholder framework. When it launched the initiative in 2016, the Dutch government expressed the ambition of bringing to life such agreements across at least 10 Dutch industry sectors by the end of 2016, including the Dutch food industry. However, at the time of writing this report, only five such agreements had been signed: for textiles, the banking sector, wood and paper, gold, and proteins of vegetable origin.

Negotiations for an agreement in the food sector came to a grinding halt in October 2017, when six of the eight NGOs involved in the negotiations – including Oxfam Novib, Fairfood and UNICEF – publicly announced that they were pulling out of the process. In a press release, the six organizations explained that despite two years of efforts to come to an agreement with the food sector, including the Dutch supermarkets represented by the Centraal Bureau Levensmiddelenhandel (CBL), there was no prospect of a deal. The main criticisms levelled by the six NGOs revolved around the reluctance of the Dutch supermarkets and food companies to commit individually to the agreement, the lack of concrete targets, and the lack of transparency in implementing the agreement.[106] The current government in its coalition agreement signed upon inauguration in 2017, announced that it will continue to support the sector agreements, and after two years evaluate whether more mandatory measures are needed.[107]



A woman farmer in Central Africa.
Photo: Eleanor Farmer/Oxfam

RELIANCE ON CERTIFICATION

So far, most retailers apply some level of voluntary sustainability standards via third-party certification to show that their supply chains are becoming more environmentally and socially responsible. The sale of certified products has grown considerably over recent years in the Netherlands: total sales reached around €3bn in 2016, representing 12% of total supermarket turnover.[108]

While the increase in sales of sustainably certified food can be considered a welcome step – elevating the importance of economic, social and environmental issues in the eyes of consumers (and therefore of the supermarkets) – they can only go so far in tackling economic exploitation, given the current power imbalance in international food chains which is at the heart of the problems in our food system. For this change to take place, it is essential that retailers take a pro-active attitude – for example by implementing due diligence in their value chains and increasing transparency about where the products come from, by ensuring their suppliers do the same and assisting them if needed, and by actively following up on shortcomings to enable social change. Solely sourcing certified products will not suffice, but that should not stop supermarkets from meaningfully engaging with stakeholders in the chain, including on standards and certifications, to seek and implement systemic solutions to the current power imbalances.

* * *

SOLELY SOURCING CERTIFIED PRODUCTS WILL NOT SUFFICE.

* * *

WHAT THE NETHERLANDS DOES WELL

We cannot name a single Dutch supermarket or system that complies with all the policy and practice that is needed to improve the lives of workers and small-scale producers as envisaged by Oxfam. But there are examples of improved practice that are worth highlighting. Box 4 highlights examples of Dutch initiatives that tackle systemic issues.

BOX 4: DUTCH INITIATIVES ON SYSTEMIC ISSUES IN FOOD SUPPLY CHAINS

Choice editing: PLUS partnership with Max Havelaar

In 2015, PLUS, the fifth largest supermarket in the Netherlands, announced a partnership with Max Havelaar, member of Fairtrade International and representing Fairtrade in the Netherlands.[109] The partnership entails the intention by PLUS to work towards a situation in which it only offers certified versions for all its own brand products for which Fairtrade options are available. In 2016, PLUS sold only Fairtrade bananas, pineapples, coconuts and limes. All PLUS own brand coffee, tea, chocolate, orange juice and basmati and pandan rice are also Fairtrade-certified.[110] Through this commitment, PLUS limits the choice available to its customers for an expanding number of products, which demonstrates that it is possible for a supermarket to guide and help consumers make better choices.

Putting a cap on profit: Marqt

Marqt is a Dutch supermarket which was established in 2008, based on the concept of: no large-scale purchases, but 'fair' food, locally produced, preferably seasonal, and for a 'fair' price.[111] It currently has supermarkets in 15 locations, mainly in the big cities (including Amsterdam, The Hague and Rotterdam). Marqt recently acquired two new shareholders, Triodos Organic Growth Fund and Social Impact Ventures, which agreed to a new model of profit sharing: any profit higher than 3% of turnover will only partially be paid to shareholders (25%), while the remaining 75% will be paid back to workers and consumers. Through this system, Marqt wants to get rid of the perverse incentive to cut costs and earn more.[112]

Daring to commit to a living income: Tony's Chocolonely

Tony's Chocolonely was established in 2005 with the mission to produce the first 'slave-free' chocolate bar.[113] Shortly afterwards, with the realization of how difficult it is to guarantee 100% slave-free chocolate, it changed its slogan to 'on the way to 100% slave-free chocolate'. Over the next 10 years, Tony's Chocolonely was able to establish itself as a serious competitor with other chocolate brands, first in the Netherlands and increasingly abroad. In 2016, Tony's obtained a market share of 12.4%, a 44% increase compared with 2015.

Tony's second principle is to pay cocoa producers a fair price. Producers receive an additional premium to attain a 'living income' in their country, and to prevent child labour and slavery on plantations.[114]

Rethinking the model: Moyee Fairchain coffee[115]

Getting away from the Western-monopolized coffee production model, and promoting premium coffee that is roasted and processed within coffee-growing countries, is at the heart of Moyee's 'revolution' in coffee production. Moyee's model is based on adding value in countries like Ethiopia to enable small-scale producers to increase their share of end consumer price. According to its own account, through its 'Call the farmer' project, Moyee buys coffee beans from some of the smallest and most remote farms in Ethiopia.[116]

6 AN AGENDA FOR CHANGE

THE CHANGE WE WANT TO SEE

Growing inequality and the suffering of women and men are hardwired into supermarket supply chains. There is no quick fix. But sustained effort with action from supermarkets, governments, small-scale producers and workers, and other industry actors can make a difference to millions of lives.

The supermarket industry has seen steady rises in profits over time. With supermarkets capturing increased value from the products they sell, living wage and income benchmarks can be met without necessarily increasing the prices consumers pay.[117]

Oxfam is joining forces with citizens in the Netherlands and around the world to call for an end to the suffering of the women and men who grow and process the food we buy in our supermarkets.

RECOMMENDATIONS FOR DUTCH SUPERMARKETS

- **Radically improve transparency in the sourcing of food:** to shine a light on current working practices in food supply chains and ensure that citizens can hold companies and governments to account for their activities;
- **Know, show and act on the risks of human rights violations faced by women and men in supermarket supply chains:** to move beyond an ad-hoc approach aimed at the auditing of suppliers, to one based on the anticipation and prevention of human and labour rights violations;
- **Take steps to guarantee safe working conditions and equal opportunities for women:** to demand secure contracts and equal pay for equal work, and immediate steps to end violence and discrimination for women working in food supply chains;
- **Fairly share the significant revenues in the food industry with the women and men who produce our food:** through closing the gap between prevailing and living income levels, using trading practice to promote strong performance on human rights and through exploring alternative business models and ways of doing business that may result in a fairer share of the value of their produce reaching producers.

RECOMMENDATIONS FOR THE DUTCH GOVERNMENT

Introduce and implement binding legislation to enforce human rights due diligence in company supply chains, to include:

- A requirement for companies to identify, prevent and act upon harm and risks faced by people in their business operations, including in third party countries;
- A requirement for companies to ensure access to remedy for workers and trade unions in producer countries;
- Alignment of policies and legislation with the UN Guiding Principles on Business and Human Rights, to ensure meaningful participation from affected communities and workers;
- Binding mechanisms to monitor and report on the implementation of due diligence in supply chains;
- Binding policies and legislation to prevent companies from using unfair trading practices in their dealings with suppliers.

A full set of recommendations is available in the report *Ripe for Change:* R. Willoughby and T. Gore. (2018). Ripe for Change: Ending human suffering in supermarket supply chains.

NOTES

Except where stated otherwise, all links were last accessed January 2018.

1 For the purposes of this report, a 'supermarket' comprises a self-service food retail market selling a variety of food and household items, organized into departments. Our use of the term 'supermarket' also comprises large supermarkets such as 'hypermarkets', which specialize in food as well as other consumer goods, and 'discounters', which focus on a budget segment of the food retail market. When we say 'Dutch supermarkets', we refer to supermarkets operating in the Netherlands. In the case of Aldi and Lidl, we refer to the Dutch subsidiary companies of the corresponding German retail chains.

2 Distrifood (2018, 19 February). Market shares 2007–2017 Nielsen. Retrieved 1 May 2018 from: http://www.distrifood.nl/service/marktaandelen. Albert Heijn and Jumbo Groep together held 54% of the market share in the supermarket sector in the Netherlands in 2017.

3 T. Geijer, ING. Groei foodretail in lijn met economie. Retrieved 27 October 2017 from: https://www.ing.nl/zakelijk/kennis-over-de-economie/uw-sector/ondernemen-in/supermarkten.html CBS. Detailhandel omzetontwikkeling. (2017, 13 October). Retrieved 27 October 2017 from: http://statline.cbs.nl/Statweb/publication/?DM=SLNL&PA=81804NED&D1=a&D2=0-2,5,29&D3=16,33,50,67,84,101,118,135,152,169,186,197-213&HDR=G1,T&STB=G2&VW=T (See column 4711 Supermarkten)

4 R. Willoughby and T. Gore. (2018). Ripe for Change: Ending human suffering in supermarket supply chains. Nairobi: Oxfam. Retrieved from: http://policy-practice.oxfam.org.uk/publications/ripe-for-change-ending-human-suffering-in-supermarket-supply-chains-620418

5 C. Alliot et al. (Forthcoming). Distribution of Value and Power in Food Value Chains. Oxfam-commissioned research undertaken by BASIC.

6 The scorecard can be found online here.

7 Oxfam and the Sustainable Seafood Alliance Indonesia. (2018). Supermarket Responsibilities for Supply Chain Workers' Rights: Continuing challenges in seafood supply chains and the case for stronger supermarket action. Nairobi: Oxfam. Retrieved from: http://policy-practice.oxfam.org.uk/publications/supermarket-responsibilities-for-supply-chain-workers-rights-continuing-challen-620480

8 According to the ILO Forced Labour Convention, 1930 (No. 29), forced or compulsory labour is defined as 'all work or service which is exacted from any person under the threat of a penalty and for which the person has not offered himself or herself voluntarily'. As the ILO notes, 'it refers to situations in which persons are coerced to work through the use of violence or intimidation, or by more subtle means such as manipulated debt, retention of identity papers or threats of denunciation to immigration authorities.' See: http://www.ilo.org/global/topics/forced-labour/definition/lang--en/index.htm

9 Oxfam and the Sustainable Seafood Alliance Indonesia. (2018). Supermarket Responsibilities for Supply Chain Workers' Rights. Op. cit.

10 R. Bailey. (2011). Growing a Better Future: Food justice in a resource-constrained world. Retrieved from: https://www.oxfam.org/en/growing-better-future

11 Oxfam Novib. Projects and programmes: GRAISEA. Retrieved from: https://www.oxfamnovib.nl/donors-partners/about-oxfam/projects-and-programs/graisea

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