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SUMMARY REPORT OF THE FOOD CHAIN NETWORK MEETING:
12-13 SEPTEMBER 2011

29-30 November 2011

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SUMMARY REPORT OF THE FOOD CHAIN NETWORK MEETING: 12-13 SEPTEMBER 2011

1. Over 100 delegates from government, private sector, international organisations, non-governmental organisations (NGOs) and academia attended the second Food Chain Network meeting. The two-day meeting covered two topics, building a sustainable food chain; and food price monitoring and transparency along the chain. These topics were identified at the first Food Chain Network meeting and endorsed by the Committee for Agriculture at its meeting in December 2010.

2. The first day was devoted to “Building a Sustainable Food Chain,” with presentations by academics, NGOs, governmental and international organisations as well as several roundtable discussion sessions whose main participants were mainly from the private sector and its associations. This topic reflects the Committee for Agriculture’s growing recognition of the need to ensure sustainable food systems over the long run and to define the role for public policy in the context of growing number of private initiatives already undertaken by NGOs and the private sector. The second day was devoted to the issue of price formation, transmission and transparency along the food chain. This is a recurrent topic in agricultural policy discussions and the network provided an opportunity for an exchange of information on activities by OECD countries as well as for an understanding of the private sector’s vision of the issue.

3. This report is an attempt to synthesise the key issues and points of discussion from the two-day meeting and is not a detailed summary of each presentation or specific interventions by participants. All presentations as well as background materials can be found on the website devoted to the food chain network meeting can be found at: www.oecd.org/agriculture/foodchainnetwork

Day 1: Building a Sustainable Food Chain

4. The meeting addressed four main topics:

- Growth under resource constraints
- Private sector initiatives, impacts and developing country challenges
- Public-Private sector collaborations
- Policy challenges: a new role for government the business sector, international organisations and non-governmental organisations?

Growth under resource constraints

5. There is growing recognition among stakeholders and civil society that the food system needs not only to secure long term food supplies for a growing world population, but also to respond to the unprecedented environmental, social and economic pressures in meeting these demands. Two competing narratives: the productivity narrative and the sufficiency narrative are currently used to understand the diverse concerns about the food system and to define pathways towards a more sustainable food system. The productivity narrative can be briefly described as “doing more with less”, while the sufficiency narrative’s message is “less is more”.

6. The productivity narrative dominates the current discourse and relies on technological solutions through scientific advances to raise resource efficiency in an environmentally sustainable way and thus relax the resource constraints. This solution will require massive investment in research and development by government and industry, promoting technology adoption by farmers across the globe as well as more open markets. The business community generally tends to favour the productivity narrative because it represents a more familiar approach to dealing with scarcity and resource constraint issues.

7. In contrast, the sufficiency narrative emphasizes the need to curb waste and over-consumption but also relies on increasing resource use efficiency at all levels. The solution requires not only scientific advances to promote agro-ecosystems that are productive as well as resource saving, but also behavioural change by consumers and development of appropriate national and international governance structures. This means, for example, internalising environmental externalities through appropriate governance structures. Given the inference of reduced consumption the business community may likely resist this approach, although through innovation it is likely to provide new market opportunities.

8. The business community expressed their concern over waste and their intention to give greater attention to reducing waste along the food chain. This is seen as a major challenge for firms but not impossible to achieve. They also expressed continued attention to ensuring a sustainable food system necessary to continue doing business as well as feeding the world. It is the approach in achieving these goals which differs among stakeholders that the discussion highlighted.

9. But neither the productivity nor the sufficiency narrative are adequate on their own to meet the sustainability challenge, but rather a holistic approach integrating the two approaches is required. How can these two approaches can be integrated and translated into action by all stakeholders was an important discussion topic. It raised the issue of the role of policy in forging a path towards meeting productivity and sustainability goals. The challenge for the public policy, noted by different participants, is to provide incentives for all stakeholders to cooperate in meeting these new demands and to develop governance structures that can assist them in doing so. There is no well chartered course of action, thus it could mean taking actions that are often unfamiliar, uncomfortable and for which the consequences are not yet knowable.

10. Numerous agricultural and environmental policies have been adopted to limit rising pressure on agricultural resources, but impatience with governments' uneven progress toward finding a path to long term sustainability has in fact led numerous NGOs as well as businesses voluntarily to adopt various initiatives for sustainability. These most frequently appear as production process standards or criteria for specific products.

11. The initiatives undertaken by the business sector have arisen out of the identification of the need to secure on long term raw material supplies, which require them often to reach across the globe. At the same time, they must protect and differentiate their products from their competitors. This is often done through branding of specific production processes, such as ethically sourced and environmentally responsible products to consumers. Competition has shifted from simple price competition to price and quality competition, where quality may embody specific product or process attributes, including environmental and ethical guarantees. A number of panellists from the business sector underlined the need by firms to position themselves as supply chain stewards, with sustainability being part of their product offering. This means they no longer want to operate within the "business as usual" paradigm. But what options do they have or perceive to have?

Private voluntary initiatives and their impacts

12. With the growth of global sourcing, links between North-South supply chains have increased pressure for North's businesses to ensure that the developing and emerging economies also promote sustainability. NGOs have often taken the lead in developing sustainability initiatives, often accompanied by ethical sourcing procedures. This has led to a wide array of products on the market and many have been steadily increasing their market share though these remain very small in terms of total product offering on the market. Sustainable or fair-trade tea and bananas have been exceptions attaining approximately 15-20% of the marketed product. Products under the label of Fair Trade, or Rain Forest Alliance have become recognised brands and are attracting more and more consumers particularly in certain countries such as the United Kingdom among others.

13. Many of the NGOs are now collaborating with multinationals to extend the reach of the fair trade and sustainability programmes thus cover a wider share of the market. Many of the network participants found this to be a positive development for sustainability of products from developing countries. The farm level implication of these initiatives is however of some concern for developing countries. This is mainly because of their limited resources in testing and monitoring and the need for assistance in complying with the criteria, where criteria are well-defined and certification by third parties is required. But how and who should deliver the assistance when demands on the South originate in the North countries? Who should pay for necessary investments to meet the North's criteria?

14. Most firms source from many suppliers around the globe and compete for supplies. As noted by certain panellists, their approach has been to nudge producers to employ environmentally sustainable methods and NOT to exclude them from the supply chain if they do not completely conform. Most suppliers are assisted in their compliance, so that they can comply but the extent of assistance is unknown in general and varies across firms and products. It was however was noted that in many instances some of these schemes tend to reach producers able to produce in a sustainable fashion and do not reach those that require the most help. This raises the question of whether there is a role for governments in reaching those least able to meet these standards.

15. Firm policies in this area differ across market supply structures as well as the extent to which 'environmental or social' elements are signalled to consumers, (B2C) or remain simply business to business (B2B) requirements. In the B2C category, most sustainability labels have tended to be for a limited number of products with very specific characteristics, often 'niche products' for which third party certification is required, these thus have limited potential to affect sustainability goals overall.

16. The B2B approach however may provide for wider market uptake even if more general criteria on sustainability is applied. These criteria are often defined as a set of good agricultural practices (GAP) along with food safety. This approach could increase the reach of sustainability efforts because of market access for many producers, including small and medium sized ones around the globe willing and able to apply GAP and the necessary food safety criteria. The two approaches, B2B and B2C, can at times overlap so that B2C includes the B2B criteria. How efficacious are these in improving the environmental sustainability or reinforcing other sustainability pillars such as economic and social?[1]

17. Industry associations such as the Sustainable Agricultural Initiative (SAI), aim to facilitate sharing at the pre-competitive level, knowledge and to support the development and implementation of sustainable agriculture practices. These initiatives, particularly when undertaken by associations of multinational enterprises, can in principle have substantial impacts because of the size of markets.

1 Sustainability for this discussion rests on three pillars: environment, economic, and social to which a fourth pillar is often added - that of governance.

Furthermore, when they team up with highly credible NGOS such as the WWF (World Wildlife Fund), they generate consumer confidence in a firm's efforts as well as stakeholder support. Indeed, the Commodity Roundtables initiated by WWF with the collaboration of major multinational enterprises (MNEs) have grown in importance in promoting sustainable production through a stakeholder approach. Furthermore, because these firms are focused on international markets of economic importance for basic commodities such as palm oil, soya, cotton, sugarcane and more recently beef, they are used as examples of business sector sustainability practices with possible worldwide impacts. Because these firms have a global reach, they are able to fill an important gap in the governance of resource use and extend certain sustainability criteria to a wide and growing market.

18. But unless firms are held to account for their actions, such initiatives can be little more than public relation tools for some participants. Certain discussants and presentations suggested that without government or international organisation involvement to protect human rights and ensure a level playing field for all progress may be slow. This may indicate a role for government in defining criteria and ensuring basic rights and responsibilities of all market participants.

19. Another important effort in promoting the sustainability of food chains was undertaken by retailers themselves and producer groups through Global Gap, a B2B standard, which drove harmonisation through benchmarking of requirements. It chose to build on what was already good; it now recognises some 25 national standards as satisfying Good Agricultural Practices (GAP). This means a wider reach in terms of GAPs, an important component of sustainability at the farm level. More recently they have given particular emphasis to teaming up with national governments to create a public–private approach in a multi-stakeholder framework. This approach appears to be gaining ground, particularly as increased numbers of major food companies are requiring certification to the Global Gap scheme.

20. Given the diversity and plethora of initiatives, the business sector has developed the Global Social Compliance Programme (GSCP) to promote collaboration on social and environmental issues to attempt to avoid duplication in requirements and certification processes. The GSCP created a set of reference tools for companies that wish to set a policy for sustainability, including equivalence that can support more efficient use of labour and environmental standards. Given the number of firms worldwide that adhere to the GSCP it has potential to be an important factor in harmonising criteria for environment and labour standards through benchmarking with a commonly agreed set of criteria.

21. In reviewing over 1 000 private voluntary standards for sustainability, most were found to be driven by NGOs of North countries and are generally labelled as to their specific attribute. Thus, they are business to consumer standards and attempt to generate price premia for producers who adhere to them. But the question often posed is: are they credible? The credibility of a standard relies not only on the criteria behind the standard but also on the rigour of its application. Though there are many criteria for a given standard, the extent to which these are formally required varies quite markedly between standards. Most private voluntary standards focus on diverse environmental criteria, although many include a multitude of economic and social standards. For instance, while the use of synthetics inputs, water and waste index is moderately critical to most of the private standards, few include biodiversity or waste control criteria and most do not use greenhouse gas emissions or energy use limits. Only labour standards are a basic critical requirement for most of these initiatives, but health, safety and employment conditions appear to be less frequently required for certification http://www.iisd.org/pdf/2010/ssi_sustainability_review_2010.pdf

What impacts?

22. What have these initiatives achieved? Most speakers admitted that it has been extremely difficult to document the impact of private standards on environmental sustainability for a given standard. But

given the mediocre level of enforcement of most of the criteria, as documented in the study by the International Institute for Sustainable Development, it is not clear how effective these are in having widespread or profound impacts on sustainability. Furthermore, the metric to measure the impacts of these specific measures has not been well defined in most cases. The issue of measurement was raised at various times in the discussion as it was seen as key to evaluating credibility of the standards by consumers. Without credibility of a standard, will consumers be willing to pay more for the specific attribute?

23. The European Union Farmers' Union (COPA-CoGECA), while supporting the move towards sustainable farming systems, underlined that the plethora of standards and their complex requirements has frequently generated confusion among farmers on what they need to do to be sustainable. Furthermore, they are concerned about the costs of many specific private requirements, most of which duplicate each other, yet require separate certifications. They also reiterated that they may not be sufficiently remunerated for applying any specific standards, in particular those that are B2B which do not communicate their effort to the consumer.

Developing country challenges

24. The developing and emerging country issues were in many respects similar to those raised by the European Union Farmers' Union, where the wide variety of initiatives and their specific criteria create numerous difficulties in compliance for market entry. It was noted by a representative from Africa, that while these private sustainability initiatives are not government regulations for market access they are frequently binding to market entry in North countries. Importers can decide not to source from producers without proof of compliance of a specific private standard. Many developing and emerging countries, it was noted in the discussion, acknowledge the usefulness of private standards to raise quality attributes, ensure food safety, and often provide spill over effects to local markets. For those able to comply however these different schemes have improved entry into new markets in North countries. Until recently they have been simply takers of the standards. Given improvements in knowledge of what commercial markets require, they now want to participate in the formulation of criteria, equivalence procedures and monitoring frameworks, so as to take into account local conditions without negating or diminishing the objectives of the criteria. In the past, many of these initiatives were developed and applied without regard for adapting to local conditions, leading at times to the exclusion of the small and medium sized holders, a critical issue in developing countries with a large share of the labour force in agriculture.

25. The discussion also noted that government policies for sustainable production, when coupled with the demands of the private sector, can be inconsistent and could generate unnecessary difficulties for producers. As most of these sustainability initiatives are driven by North firms or NGOs also from North countries, they have generally excluded governments in their formulation and/or certification procedures. This means there is a risk that these private firm goals may not align well with those of governments who generally seek to stabilise prices, ensure a stable food production for local markets and look for ways of dealing with social cohesion strains of urban-rural divide. The extreme diversity of agriculture in developing and emerging economies may not necessarily be taken into account by these standards, with the risk of excluding large numbers of small holders from participating in the opportunities which trade could bring.

26. Changes in developing are now underway that view sustainable food production as a necessary objective for continued growth in food production, and consider trade an important element in economic sustainability and social cohesion. It was suggested by several speakers that increased trade between South-South countries may be an opportunity which has not as yet been fully exploited. It may provide a learning process to meet production process and food safety standards at levels that are feasible for local producers/manufacturers and recognise government safety regulations. This option is now being viewed as a way to integrate small holders into an economic system that can bring improved livelihoods and greater

social stability, while learning to adapt to needs modern markets and, if need be, integrate into North-South trade. It was noted that there are many models for integrating into world markets which do not rely exclusively on North-South trade.

27. Another important issue raised was that of governance of resources with respect to agricultural production. To devise a strategy for governing resource use over the long run requires collaboration between governments and local businesses and farmers. This is a challenge for developing and emerging economies where government resources are limited and failure can be very costly. What new forms of cooperation or governance models are needed to respond to their specific needs both at the domestic and international level?

Public-private collaborations

28. Although most explicit efforts for sustainability appear to have been undertaken by the private sector and/or NGOs, this may be because these are the most publicised or marketed activities. Governments do not generally advertise all their efforts in this area, even if many are undertaken. Nonetheless, there is a trend towards greater co-operation between governments and/or international organisations and the business sector to recognise the importance of sustainability along the food chain and in trade and to mobilise resources to act. These latter efforts are moving forward the sustainability agenda.

29. Two important examples were: the FAO-UNEP task force and the European Union's European Food and Sustainable Consumption and Production Round Table (SCP). The FAO-UNEP project encourages market based approaches that strengthen supply chain links and provide conditions for public-private partnerships. For instance, the FAO-UNEP rice initiative is promoting a sustainable agriculture which is linked to markets that are accessible to developing countries. This means acting to promote greater South-South trade while promoting sustainable production methods. The Food SCP Round Table approach is one of building agreement and collaboration on three main areas: establishing a harmonised environmental assessment methodology; identifying suitable tools for communicating environmental performance along the food chain; and promoting continuous environmental improvement. The aim is that this will generate concrete actions on environmental sustainability for food chain partners. There is a well established structure behind this Round Table with clear objectives, yearly mandates and regular meetings of working groups, steering committee and plenary session. The approach is an open one not only with industry representatives of the whole food chain, government, international organisations and civil society participating, but also with public consultations on findings and recommendations. The plenary meeting on 8 December 2011 will present the progress and deliverables so far, and discuss the way forward. Following a public consultation, the Round Table will also present its Recommendations for Communicating Environmental Information along the Food Chain for adoption by the Plenary meeting.

Policy Challenges: a new role for governments, the business sector, international organisations and non-governmental organisations?

30. Governments, international organisations, the business sector, NGOs, the private sector and citizens at large have become aware of the world's finite resource base which must provide for increased food production over the medium and long term. They all recognise the need to promote an agriculture and food system which can preserve not only the fragile environmental equilibrium, but also promote social acceptability and be economically viable for all participants. Sustainability of the food production system has been generally considered to rest on three pillars: environment, economics and society, each of which is important to the sustainable outcomes. However, governance is now being suggested as the fourth pillar which can ensure the stability and consistency of the three basic pillars. With the wide array of initiatives, by different stakeholders, from business and NGOs to international organisations and national

governments, the discussion expressed the need for more concerted action among all stakeholders. But how can this be done?

31. Measuring the impact of any given action individually or even as a set of inter-dependent actions was referred to frequently in the discussion, but no answer was offered. For most private initiatives this means how to measure and evaluate what you do and how to market it in a remunerative and credible manner. While the private sector and NGOs have taken the lead in promoting a more environmentally sustainable food system to ensure continued agricultural supplies and to respond to consumer demands, the question remains who and how are these claims validated? The response in claiming sustainability standards has meant that the criteria and requirements may not be those needed and this can create uncertainty as to the validity of claims. Governments are being called to set guidelines for different claims, so that these claims have credibility with consumers. This approach may provide incentives to consumers to pay higher prices knowing that the claims are truthful. Here the co-operation and co-ordination between the public and private sectors, as well as international organisations and NGOs, could assist in moving forward the sustainability agenda.

32. Thus, while the food industry and retailers can provide incentives to producers to make their production more sustainable, there is also a role for government through specific subsidies and taxes, in addition to regulatory programmes. What is the role of government in the transition to a more sustainable food chain? What policies can provide the right incentives to all stakeholders along the chain for improved production methods? What tools are available to integrate private and public approaches into the three pillars of sustainability in a coherent and consistent manner? The political discussion about moving towards a sustainable food system has not been forthcoming, as it may require a fundamental restructuring of objectives and policy tools by government and the private sector. This raises a number of questions and issues such as: What is the role for government in setting criteria for agricultural practices to promote greater environmental and social sustainability? Is it regulation or simple nudges? Moreover, how is this to be enforced when supplies are sourced globally, given the reach of national policies? Does it mean greater reliance on the private sector or alliances between public and private sector actors? Do we need a new model of public-private governance for the food system?

33. The first day's discussion, devoted to Building a More Sustainable Food Chain, provided only an initial step for rethinking the evolution of the food system which needs to be environmentally sustainable, economically viable and socially acceptable. But it was an important first step.

Day 2. Price Formation, Transmission and Transparency in the Food Chain

Issues and concerns

34. The second day focused on price formation, transmission and transparency in the food chain. Food price monitoring is generally perceived as a means to increase market transparency and to chart price transmission along the food chain. Many governments collect and publish such information. This session examined the critical issues and current monitoring activities. The objective was to share information and experiences about what has been learned to date from food price monitoring and analysis in terms of best practices, unresolved issues and areas for further work.

35. A review of critical issues was presented based on initial work of the Transparency of Food Pricing Research Project (TRANSFOP), a new three-year EU-wide project funded by the European Commission (www.transfop.eu).The overall aim of the project is to investigate the determinants of food prices across EU Member States and the role that competition and other features of food chains may determine food prices. High world commodity prices in 2007-08 caused significant rises in food price inflation across the EU. However, the experience varied considerably across EU Member States. With

world commodity prices likely to be higher in future years compared with over the last decade or so, understanding the factors that determine retail food prices in the EU is a considerable challenge for the research community and of major significance for policymakers and other stakeholders (e.g. consumers, the food industry and producers), both at the national and EU levels.

36. Part of the work involves estimating a model explaining food price inflation in the UK. Food price inflation (as with many other countries) has exceeded non-food price inflation over recent years (currently just in excess of 6% per annum) and, more generally, tends to be relatively volatile. An obvious cause for this is the recent rise in world agricultural commodity prices. It was argued that while important, other factors such as exchange rates, labour costs and oil prices may matter too. Based on a vector error correction model, the main drivers of food price inflation in recent years have been world agricultural prices and exchange rates, but they also show that the duration of the ‘spike’ on world markets is an important issue. Since world commodity price spikes tend to be short-lived rather than permanent events, the impact of commodity price changes on retail food prices will be highly dependent on the nature of the shock emanating from world markets. Future work will develop a more complete picture of how shocks are transmitted throughout the food supply chain and what aspects of competition and regulation (and cross-country differences impact on the functioning of food supply chains and the different EU experiences of food price inflation. The process of change and restructuring in the food sector by country and globally will also be examined.

37. Recognising that a main driver of food prices are world agricultural prices, the Food Chain Network was introduced to the new Agricultural Market Information system (AMIS). The G20 mandate from the 2010 Seoul Summit requested that the FAO, IFAD, IMF, OECD, UNCTAD, the World Bank and the WTO work with key stakeholders to develop options for G20 consideration on how to better mitigate and manage the risks associated with the price volatility of food and other agricultural commodities, without distorting market behaviour, ultimately to protect the most vulnerable. The organisations agreed that lack of reliable and up-to-date information on supply, demand, stocks and export availability contributed to recent volatility. Weakness in in-country capacity to produce consistent, accurate and timely agricultural market data and forecasts was seen as a weakness with poor stock data identified as a particular problem. Poor domestic price data and poor understanding of how international and domestic markets are linked had led to hasty and uncoordinated policy responses resulting from incomplete understanding of events and incomplete information.

38. AMIS was established to help reduce volatility at the global level and improve international co-ordination between governments. Building on and complementing existing systems, AMIS is a collaborative food information and policy initiative involving countries, international organisations and the private sector. The purpose is to improve data reliability, timeliness and frequency, overcome weaknesses and gaps, and to enhance policy dialogue and co-ordination in times of crisis. Initial coverage will be of major food grains (rice, maize, wheat, oilseeds), to be expanded gradually. With the Secretariat housed at the FAO, G20 member countries (and some other important market players) will form a Global Food Market Information Group of agriculture and food experts to monitor market and policy developments, as well as a Rapid Response Forum to address emerging food crisis situations. A key deliverable will be monthly and bi-annual reports and bulletins, including the assessment of policy measures affecting markets. Involvement of the private sector will be encouraged although modalities have yet to be decided.

39. The results of an informal OECD country survey on food price formation issues and initiatives were presented. The objective of the survey was to identify the important government offices or entities and their respective roles in monitoring prices along the food chain and to identify the key issues of concern in member countries with respect to food prices. The OECD survey on Price Monitoring Activities had a response rate of about 50%, which is 26 out of 34 countries responded. These included Austria, Belgium, Spain, Estonia, Finland, France, Netherlands, Slovak Republic, United Kingdom, Switzerland

and Sweden for Europe; Canada, United States, and Mexico for the Americas and Japan and New Zealand for Asia and Oceania. The survey and the responses can be found on the website at: www.oecd.org/agriculture/foodchainnetwork

40. Two issues regarding food prices dominated the survey results: transparency and price formation mechanisms. Food price issues were judged to be highly important for principle actors along the food chain (producers, processors and manufacturers and retailers), consumers and policy makers. They all expressed the need for greater transparency in price formation at all stages of the chain and for an improved understanding of the price transmission mechanisms along the chain. These two factors were viewed as important in permitting all stakeholders to understand better the distribution of value added along the chain. For policy makers this information was considered necessary to formulate policies which could help maintain the consumer's purchasing power or at least mitigate its decline. All survey responses underlined the difficulties of dealing with food price volatility. It was considered by many to disrupt market functioning, destabilise the economy and could imperil food security for certain strata of the population.

41. A roundtable discussion of stakeholder views of food price issues raised a wide variety of divergent concerns and viewpoints. Some government officials indicated there was little demand for food price monitoring in their countries. Conversely, some participants agreed that food prices (always an issue for the poor) had become much more of a concerns during the recent downturn in the global economy; that prices were now a key driver of consumer decisions with discount stores increasing market share and much more price transparency through price promotions and on-line shopping. A common view was that recent price volatility was more of a concern throughout the food chain than price levels.

42. A producer perspective was that large commercial farms were more viable because of lower costs and benefited from higher and more stable prices through contracting. A high proportion of smaller farms are faced with negative margins as input prices have outpaced product prices. There was some discussion of the need for governments to better facilitate contracts for producers and recognition of the FAO efforts to make generic contracts readily available on-line, but a system of compulsory contracts would be extremely difficult to implement and many questioned the validity of a government role in business-to-business contracting.

43. Food manufacturers questioned the value of measuring price margins along the food chain as the structure of the food industry was highly diverse such that it was very difficult to generalise. It should be sufficient for competition authorities to carefully monitor markets and investigate any signs of anti-competitive behaviour. Measuring food prices was less of a concern but seen as very difficult at the retail level with literally tens of thousands of products, different store formats, private vs. brand labels, frequent promotions, loyalty programmes, coupons, rebates, slotting fees, exclusive agreements, etc., that such information would have to be interpreted with great care.

44. The wholesale and retail sector noted that farm to retail price spreads tended to be linked to volume as well as value. They also supported food price monitoring (although questioned what could be considered a reliable reference price), and were generally ready to share information. Their major interest was in fruits and vegetables price formation as less processing was involved, with little interest in cereals (or contact with cereal producers) which have little impact on retail food prices. Consumers have more concerns about market concentration with very few large retailers accounting for large market shares. However, it was noted that competition inquiries had generally returned favourable reports. On the food vs. fuel debate, it was argued that while growing biofuel production did increase food and feed grain prices, the final impact on retail food prices was small.

Food price monitoring and research

45. A report by the **Netherlands Competition Authority** (NMa) was made available to delegates on the Food Chain Network website and mentioned briefly at the meeting. This study investigated the pricing of eight basic foods (e.g. selected fruits and vegetables, bread, eggs) to obtain a better insight into how the food supply chain functions in the agri-food sector in the Netherlands. The investigation was carried out in response to frequent assertions that supermarkets get a relatively high profit margin at the expense of producers, *i.e.* farmers and market gardeners. Selling price, costs and margins in the different links in the supply chain for these foods were examined over the 2005-08 period. At issue was whether one of the links in the supply chain had obtained a market position that enabled it to improve its margin through a unilateral price increase and how the degree of concentration at supermarket level may have influenced the development of the purchasing and selling prices of supermarkets.

46. The report concluded that the prices in the agri-food sector in the 2005-08 period increased sharply for all links in the supply chain with this price development strongest at the producer level. The investigation showed no indication that the supermarket is dominant in pricing in the agri-food sector. Supermarkets were not generally able to improve their margins permanently, as price increases at consumer level are accompanied by price increases at the wholesale level. A large price difference between the producer and supermarket price did not always mean that the supermarket gets the highest margin as a percentage of the selling price in relation to the producer and wholesaler.

47. The **European Food Prices Monitoring Tool**[2] aims at improving the accessibility of statistical data on prices in successive stages of a number of food supply chains. The tool reports on price developments of agricultural commodities, producer price indices in the food industries, and consumer prices developments. The first prototype of the European Food Prices Monitoring Tool was developed in 2009 as a follow-up to the Commission Communication "Food Prices in Europe (December 2008)". Eurostat is at present further developing the tool in line with the work announced in the communication: "A better functioning food supply chain in Europe" (October 2009): the number of supply chains is currently being extended and the integration of international trade data is expected to become available in the short term.

48. The tool facilitates comparisons of price indices of goods at various stages of the food supply chain (e.g. grains, flour and bread). The work uses data which already exists either at EU or national level. One of the current objectives is to avoid creating additional burdens such as additional data collection requirements. A direct measurement of margins at the various stages of the chains is not possible with data available at present and therefore not foreseen at European level.

49. Additionally, an experimental collection of data on consumer price levels of individual products is being carried out and used in the Consumer Markets Scoreboard.[3] The Scoreboard is intended to monitor market performance from the perspective of economic and social outcomes for consumers and steer policy-makers to EU consumer problems in the single market. A study of the functioning of the meat market for consumers is being carried out and it covers Single Market choice, prices and quality for consumers and consumer decision-making in the meat market.

50. The Observatory for the Formation of Prices and Margins of Food Products was set up under the law for the Modernization of Agriculture and Fisheries in July 2010. The Observatory has as its objectives to inform and to clarify for stakeholders and public authorities the price formation and margins of retail food prices for a variety of agricultural, fisheries and aquaculture products. The Observatory is directly

2 http://ec.europa.eu/enterprise/sectors/food/competitiveness/prices_monitoring_en.htm

3 http://ec.europa.eu/consumers/consumer_research/cms_en.htm

under the responsibility of the Minister for Agriculture and the Minister of Consumption. It brings together under the authority of an independent president, a management/advisory committee consisting of professionals of the food sector, of government as well as researchers and high level officials who guide its activities.

51. The analyses undertaken consist of expressing the retail price of a consumer food product as the sum of the value of the primary agriculture product used and the gross margins added at the successive stages of the product's transformation and commercialisation. These analyses utilise both cutting edge technical knowledge and statistical methods. To undertake such analysis, a national agency of agricultural and seafood products, FranceAgriMer, a public administrative entity was setup under the supervision of the government. [4] In terms of its operations it makes use of a set of specialists and benefits from its association with the national public statistical office (Statistical and Prospects service of the Ministry of agriculture and the National Institute of Statistics and Economic Studies (INSEE)). Many professionals involved in the transformation and distribution of food products participate in this effort to increase transparency along the food chain, notably through the collection and transmission of relevant data. An analysis of costs is also undertaken at the different stages of agricultural production, transformation and distribution, in order to determine the average margin at each stage of the specific product chain. The first studies undertaken were for beef, pork, poultry as well as milk, milk products and cheeses, and some 15 fruits and vegetables. The main results of these analyses have been published and are regularly updated for commonly consumed cuts of beef, pork, and poultry, milk products and cheeses, poultry as well as some 15 fruits and vegetables. The Observatory regularly publishes its work on the Internet. It has completed and transmitted its first rapport which was approved by the management/advisory committee to the French Parliament on June 27, 2011.

52. With respect to food price formation, outputs include reconstruction of retail prices showing the unit "gross margin" (part of value added) and the costs and production behind those margins at each stage of the marketing chain. Considerable effort is spent on collecting the best available data and identifying the most appropriate methodologies. The distribution stages are the most difficult to examine as there are no official statistics for multiproduct retail stores. A common observation is that retail margins are not necessarily related to the purchased prices. Even for unprocessed food (fresh products), retail and producer price relationships are not always linear nor do they maintain constant margins. The price relationship differs for each product and these are highly complex. The Observatory has calculated "objective" prices at all stages of the beef meat marketing chain and has come up with technical references as a base for negotiations between chain stakeholders in the livestock industry.

53. French academic research on farm-retail price transmission has shown that in some chains (tomato, endive) the upstream price (farm-gate) was the director price while in others (milk) the downstream price (food processors) was the director price. Some analysis suggests evidence of retailer market power over suppliers and consumers (fresh tomato) with market power intensity dependant on the food chain structure (upstream concentration, product perishability) and the influence of the regulatory framework. Price transmission studies indicate large productivity gains at the farm level have been transmitted up the food chain to the retail level through lower farm gate prices. However, analysis of sale-below-costs and price discrimination regulations were found in some cases to have negative effects on retail food prices with a resulting change in the regulatory framework (*i.e.* from *Loi Galland* to *Loi Dutreuil*).

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4 http://www.franceagrimer.fr/Projet-02/04infos_eco/index401.htm

54. The **Spanish Food Price Observatory**[5] of the MARM collects weekly information about the evolution of prices along the food chain for 36 fresh products on a weekly basis at three levels farmer, wholesaler and retailer. These are national weighted average prices based on market observations in different geographical locations. The full time series and some reports are available on the website. The objective of this body is to add transparency to the markets along the food chain.

55. In addition to information generation, the observatory provides consultancy, assessment and food price analysis. Its main functions are to: a) analyse price structure of the overall food chains and the driving factors for change; b) generate studies able to explain imbalances of the buyer/bargaining power among players; c) establish a fluid dialogue and a better understanding between the different chain stakeholders; and d) make policy recommendations to those administrations directly concerned. Brief update reports on each of the monitored food products include market trends in pricing, production and consumption with descriptions of processing/supply chain developments and export/import movements. A web page provides references to studies on food production and consumption, food supply chain regulations and links to food price information from other national and international bodies. A newsletter promotes dialogue between chain stakeholders by providing news and announcing seminars and conferences.

56. Some 25 chain studies (*e.g.* olive oil, milk, bread and eggs, citrus, meats, selected fish) have been carried out to detect possible inefficiencies in the food chain. The purpose is to increase transparency and efficiency among chain actors and to improve transparency about the price formation process and the value generated at each step along the chain for consumers. Each study consists of a description of the main processes at each stage of the value chain, identification of the main actors and how they interact, and a construction of the price structure from cost and profit data supplied by the sector. A common methodology for data collection (costs and margins) consists of collecting data from the main chain actors, calibrating those data against secondary sources and then validating them again with the actors and sectoral associations. Each study provides conclusions related to cost components and cost comparisons along the chain as well as to the marketing channels (*e.g.* distribution channels, shares of distributor brands, quality segmentation/value added).

57. An interesting difference is that in the case of the French observatory the provision of information is mandatory (although the normal approach is to obtain data by consensus) while in the Spanish case private sector co-operation is not obligatory.

58. Price monitoring systems in Mexico include the **National Institute of Statistics and Geography** (national consumer price index for 308 products, 48 cities, and national producer price index for 600 products and 4 200 companies), Agri-food Economics Analysis (reports on the impact of consumer prices and producer prices on the macro economy, agriculture situation and outlook for wheat corn soybean) and the **National System of Information and Market Integration** (Sistema Nacional de Información e Integración de Mercados – SNIIM).[6]

59. The SNIIM is a service that belongs to the Ministry of Economic Affairs. Its aim is to provide information about the behaviour of wholesale prices of agricultural and fisheries products commercialised in national and international markets. Additionally, the system includes a module of commercial links that allows users to place buy or sale orders of perishable products. The users only need to indicate some general personal information and the specific characteristics of the product they want to sell or buy. The SNIIM contains information for the minimum, maximum and most frequent wholesale prices of about 40 fruits and 40 vegetables, 8 livestock products and 62 fish and seafood varieties of general consumption

5 http://www.marm.es/en/alimentacion/temas/default.aspx

6 http://www.economia-sniim.gob.mx/Nuevo/

commercialised in 44 wholesale markets. This information includes variables such as quality, origin, commercial presentation and classifications by volume.

60. It is interesting to note that though Mexico is dependent on imports for the production of some of its basic foodstuffs such as, wheat bread and corn tamales, the recent high levels of international agricultural commodities did not pass through to the retail prices of these basic foods. The reason given was the moderating effect of the manufacturing sector among others.

Concluding observations

61. The technical issues associated with price monitoring, which academic researchers and government statisticians have wrestled with for decades seem to be growing increasingly complex. Remarks and questions by, presenters, panellists and representatives of OECD countries all indicated a real concern about the ability of existing government data systems and traditional analytics to provide a full understanding of food price inflation and price transmission in food markets. Among other issues, the role of increasingly sophisticated marketing and pricing at the retail level, the effects of increasingly complex contracting (driven largely by risk management efforts in response to price volatility), the lack of information about prices of food away from home, and the impact of macroeconomic linkages (*e.g.* energy, capital and exchange rates) along the entire food chain all received attention.

62. Broader issues about the distribution of returns within the food chain, in particular returns to farmers, including the “cost-price squeeze”, were also raised. These issues are not new, and at least in the case of the United States, have roots over a century deep. In spite of years of research and government interventions, the state of knowledge in this area is far from definitive and so it is no surprise that the Food Chain Network neither found a “smoking gun” nor provided absolution. The experiences of OECD countries at interventions to deal with perceived problems in this area through efforts to offer alternative contracts, new and innovative monitoring efforts or through more traditional competition policies have met with mixed success and have clearly not resolved issues of pricing transparency in the food system. These observations imply that an exchange of ideas and discussion between the private and public sectors within a network of food chain experts may provide opportunities to identify the institutional settings or structures as well as the chain management tools which could permit governments to reach their objectives, within the context of their own country specific experiences.

INVITATION

SECOND OECD FOOD CHAIN NETWORK MEETING
12-13 SEPTEMBER 2011, PARIS

This invitation is circulated to Member countries, organisations and those individuals who expressed interest in Network activities. It provides specific information regarding the second Network meeting scheduled for 12-13 September 2011 in OECD headquarters in Paris.

The 2010 OECD Agriculture Ministerial requested that the OECD contribute to a better understanding of the opportunities, challenges and appropriate policy responses facing an evolving food chain. In the 2011-12 programme of work the OECD Committee for Agriculture established a Food Chain Network including as members, government officials, international organizations, industry stakeholders, consumers, academic experts and NGOs, to provide a broad platform for dialogue on emerging issues.

Some 60 delegates attended the inaugural Network meeting held in Paris on the 13th of December 2010. This meeting and subsequent discussions with Member countries and other interested parties identified several areas of common interest under two broad themes: a) food chain efficiency and transparency; and b) food and the consumer.

The first day will address the challenge of building a more sustainable food chain while the second day will focus on issues related to food price monitoring and transparency. A draft agenda is attached. The first day will be in English only but simultaneous English-French interpretation will be provided on the second day.

For security reasons, all participants must register for this event. The reserved room capacity is limited to about 130 delegates, so early registration is encouraged but every effort will be made to include representatives from all stages of the food chain, from input suppliers to final consumers. Member country delegates and their can register through the CMS system. Other members of the network wishing to participate should contact Christine Cameron (christine.cameron@oecd.org).

A summary note of the event will be provided to all participants and eventually submitted to the OECD Committee for Agriculture. While there will be no attempt to present the results as consensus opinions, it is envisaged that the material presented and subsequent discussions will provide observations on food chain issues, activities and experiences of relevance for agricultural policy makers.

For more information, please contact Linda Fulponi (linda.fulponi@oecd.org) or Wayne Jones (wayne.jones@oecd.org).

ANNEX 1

2ND MEETING OF THE OECD FOOD CHAIN NETWORK

12-13 September 2011, Paris

DRAFT AGENDA

DAY 1: BUILDING A SUSTAINABLE FOOD CHAIN

This session seeks to provide an overview of the key challenges in achieving sustainability in the food system and the strategies proposed by different stakeholders. Building a sustainable food chain is a key challenge for the future in both the industrialised and emerging-developing economies. Ensuring environmental, economic and social sustainability in the food chain in world of limited resources will require the commitment and collaboration of all stakeholders. Given the public good nature of sustainability, a variety of formal and informal institutional arrangements, incentives and regulations are necessary.

The agenda provides for discussion on the main challenges facing the modern food system in terms of production and consumption sustainability and what incentives, public and private policies are being employed. Numerous stakeholders, private and public, are already adopting or planning to adopt specific strategies to respond to the challenge. Often goals and objectives are not well defined and metrics for gauging progress are scarce. There can be conflicts and a lack of coherence between public and private sector roles. For policy makers, the issue is to identify the policy strategies needed to facilitate and encourage all stakeholders towards adopting effective sustainability measures.

DAY 2: FOOD PRICE MONITORING AND TRANSPARENCY

This food chain network will examine price formation and transparency in the food system. Food price monitoring is generally perceived as a means to increase market transparency and to chart price transmission along the food chain. Many governments collect and publish such information but there is little assessment of the objectives, awareness, accuracy, effectiveness or analytical value of such information. The session will examine what is known about price transmission from commodity to retail markets and the determinants of price formation across different food chains. The results of a survey on food price concerns and current monitoring activities/initiatives along with some specific country activities will be presented. The objective is to share information and experiences about what has been learned to date from food price monitoring and analysis in terms of best practices, unresolved issues and areas for further work.

Monday, 12 September 2011	
09:15-09:30	**Opening: OECD Secretariat; Wilfrid Legg,** Chair and Moderator
09:30-9:45	**Sustainable Food Consumption and Production; Reconciling Growth and Resource Constraints** **Eric Mathijs**, EU Foresight Project on agriculture and Food 2011 and Head, Division of Agriculture and Food Economics, Catholic University of Leuven
9:45-10:15	**The Challenges of Sustainable Food systems Facing Developing and Emerging Economies** **Bill Vorley**, Head, Sustainable Markets Group, International Institute of Environment and Development (IIED)
10:15-11:00	**Discussants/Open Discussion** **How do we move to more environmental, economic and social sustainability in the global food chain?** • **Chris Anstey**, Consultant, sustainable food chains and private standards • **Simon Upton**, Director, OECD Environment Directorate
11:00-11:30	***Break***
11:30-12:00	**Public-Private Approaches to Building Sustainable Food Chains** • **The FAO-UNEP Food Chain Project for Promoting Sustainable Food Chains** **Alexandre Meybeck**, Coordinator, FAO-UNEP sustainability in food chains project • **The European Food and Drink Sustainable Consumption and Production Roundtable** **Joer van Laer**, DG SANCO, European Commission
12:00-13:00	**Roundtable/Open Discussion: What are stakeholders doing to promote sustainability along the food chain?** • **Siem Korver**, Director, Public Affairs, VION Food Group and Professor, Food, Farming and Agribusiness, Tilburg University • **Stephanie Mathey,** Quality Manager, Carrefour • **Claudine Musitelli**, Director, Global Social Compliance Programme; The Consumer Goods Forum • **Paolo Gouveia,** Director, Copa-Cogeca
13:00-14:30 Lunch Break	
14:30-15:00	**Voluntary initiatives for sustainability: who develops the standards, what do they claim and what do they achieve?** • **Jason Potts**, Sustainable Markets and Responsible Trade Program, International Institute for Sustainable Development
15:00-16:00	**Roundtable/Open Discussion: Private sustainability initiatives - How are they monitored? What has been achieved?** • **Kristian Moeller,** Managing Director, GLOBALG.A.P. • **Ruth Nayagah**, Managing Director, AfriCert Ltd., Kenya • **Chris Anstey**, Consultant, sustainable food chains and private standards • **Peter-Erik Ywema**, General Manager, SAI Platform
16:00-16:30	***Break***
16:30-17:30	**Roundtable/Open Discussion: What roles for government and the private sector in promoting sustainable production and consumption?** • **Andrew Fearne**, Director, Centre for Value Chain Research, University of Kent • **Roberto Rodriguez,** President, Coordinator, Getulio Vargas Foundation Agribusiness Center • **Sue Davies**, Policy Adviser, Consumers' International and Transatlantic Consumer Dialogue
17:30-18:00	**Wrap-up: Linda Fulponi**, Trade and Markets Division, Trade and Agriculture Directorate , OECD

Tuesday, 13 September 2011	
09:30-09:45	**Opening: OECD Secretariat**
09:45-10:15	**Price Formation, Transmission and Transparency in the Food Chain: Overview of Critical Issues** **Steve McCorriston**, Head, Department of Economics, University of Exeter and Coordinator, Transparency of Food Pricing (TRANSFOP) project
10:15-10:45	**The G20 Action Plan for Price Volatility and Agriculture: Agricultural Market Information System (AMIS)** **Carmel Cahill,** Senior Counsellor, Trade and Agriculture Directorate, OECD
10:45-11:15	**Results of OECD Survey on Food Price Formation Issues and Initiatives** **Linda Fulponi** and **Gaelle Gouarin**, Agro-Food Trade and Markets Division, OECD
11:15-11:45	***Break***
11:45-13:00	**Roundtable/Open Discussion: Stakeholder Views of Food Price Issues and Concerns** • **William Boehm,** US Farm Foundation Round Table • **Murk Boerstra**, Chairman, Economic and Research Analysis Experts Group, FoodDrinkEurope and Deputy Director, Federation of Dutch Grocery and Food Industry • **Léandre Boulez,** EuroCommerce, Director of Synergies Purchasing & Quality, Auchan Group • **Teresa Wickham**, Consultant, retail food market and consumer issues
13:00-14:30 Lunch Break	
14:30-15:00	**Food Prices Monitoring Tool, Forum on a Better Functioning Food Supply Chain & Consumer Scorecard** **Paulina Gbur,** DG Health and Consumers **Mario Sgarrella,** DG Enterprise and Industry, European Commission
15:00-16:30	**Presentation by Member Countries: Concerns and Activities** • **France, Jo Cadilhon –** Agro-Economist, Centre for Studies and Strategic Foresight **Philippe Boyer –** Secretary General, French Observatory on Food Prices and Margins • **Mexico, Manuel Ontiveros,** Director General of Rural Financing • **Spain, Jose Miguel Herrero,** Vice Director, Food Chain Structure, Directorate for Food and Food Industry
16:30-17:00	***Break***
17:00-17:45	**Open Discussion on Key Messages and Unresolved Issues** **Neil Conklin**, President National Farm Foundation Initial Comments and Moderator
17:45-18:00	**Wrap up: OECD Secretariat**

Participants list for Food Chain Analysis Network/Liste des participants pour Food Chain Analysis Network

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