



SUSTAINABLE FOOD SYSTEMS AND DIETS:

A REVIEW OF MULTI-STAKEHOLDER INITIATIVES



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Report design: 59deluxe.

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THE ISSUE

Sustainable food systems initiatives multiply: In recent years there has been a significant growth in the number of initiatives seeking to advance sustainable food both globally, nationally, locally and across sectors, issues and different parts of the food value chain.

Clarity required to drive increased impact: As sustainable food system initiatives continue to emerge and develop there are increasingly overlaps in the themes explored, solutions advocated, and membership of initiatives. Overlap in initiatives can dilute the resources available, cause confusion and competition and in doing so impact project outcomes and participation.

ABOUT THIS REPORT

SustainAbility and WWF collaborated to assess how multi-stakeholder initiatives addressing sustainable food systems and diets are working across stakeholders, issues, commodities and geographies. Interviews were conducted with a number of experts to build a deeper picture of the current state of play in sustainable food multi-stakeholder initiatives and identify opportunities.

This report distils our research insights and is intended to support those involved in sustainable food systems and diets initiatives to understand the global landscape, identify gaps and maximise impact.

ABOUT SUSTAINABILITY

SustainAbility is a think tank and advisory firm that inspires and enables organizations to lead the way to a sustainable economy.

In order to support meaningful progress towards a sustainable food system, we help clients advance sustainability from food growing to consumption.

Find out more about our work at www.sustainability.com

ABOUT WWF

WWF is the world's leading independent conservation organisation. We're creating solutions to the most important environmental challenges facing the planet. We work with communities, businesses and governments in over 100 countries to help people and nature thrive. Together, we're safeguarding the natural world, tackling dangerous climate change and enabling people to use only their fair share of natural resources.

Food is at the heart of many key environmental issues WWF works on. Growing, producing and importing food contributes substantially to climate change. It's a driving force behind habitat and biodiversity loss. And it's a huge drain on water resources. That's why helping to develop a sustainable food system for healthy people and a healthy planet is one of WWF's priorities. Find out more about our work at wwf.org.uk/food

RESEARCH APPROACH

Applying a systems lens: The UN High Level Task Force of Global Food and Nutrition Security defines a sustainable food system as one that delivers food and nutrition security for all in such a way that the economic, social and environmental bases to generate food security and nutrition for future generations are not compromised. This definition of a food system embraces all the elements (environment, people, inputs, processes, infrastructure, institutions, markets and trade) and activities that relate to the production, processing, distribution and marketing, preparation and consumption of food and the outputs of these activities, including socio-economic and environmental outcomes.

Research scope: Given the breadth of our food system, comprehensively mapping all initiatives and activities seeking to address elements of the food system is not possible.

This research focuses on initiatives seeking to address the food system across multiple issues or areas of the value chain and involving multiple stakeholders.

We recognise that our work excludes certain initiatives (for example those targeted on single issues, driven by single stakeholders or that are not timebound activities) and see further research into these areas as valuable contributions to be made at a later date.

METHODOLOGY

To assess the sustainable food systems and diets landscape we conducted a desk based global review (informed by stakeholder recommendations) of current initiatives that seek to adopt a food system perspective. Initiatives were mapped against the following criteria: Stakeholders involved, Geographic scope, Issue focus, Value chain focus and Output type.

TERMINOLOGY

By “initiative” we mean a project or program aiming to achieve specific objectives (typically within a defined time-period). For this reason, our research scope does not extend to established indices and other formal accountability mechanisms that exist to track and measure stakeholder performance on various aspects of the food system.

INITIATIVE INCLUSION RATIONALE



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FOREWORD



Matt Loose,
Senior Director, SustainAbility



Michael Harvey,
Senior Manager, SustainAbility

SUSTAINABILITY

Our food system is essential to life. It provides us with the nutrition we need for good health, livelihoods for millions of people, and is fundamental to the health of our ecosystem. Ensuring the sustainability of our food system is one of the defining challenges we face. It is a challenge of such scale that action by individual organisations, while important, will be insufficient to deliver the outcomes we need.

Moving our food system onto a sustainable path requires thoughtful, systemic collaboration. The collaborative initiatives we need are difficult endeavours – they require long term commitment, openness to working with new partners, purposeful funding, and ongoing monitoring to ensure they are delivering. But while difficult, the opportunities these initiatives provide for project partners and stakeholders are great. They can improve food outcomes, drive efficiency and innovation, manage risks, build new markets and supply chains, and provide commercial opportunities.

The sustainable food and nutrition initiatives identified in this work are a sign of great progress. There is evidence of mobilisation on many of the most urgent issues we face. But while we are making progress, we can, and need to, do more. This work suggests pressing areas for our attention. It suggests a need to focus our efforts towards on-the-ground delivery of sustainable food and nutrition outcomes through pilots and programmes. It suggests a need to collaborate to ensure we have adequate systems of governance that can ensure sustainable food systems take root and thrive. And it suggests that business needs to engage more deeply as critical agents of change.

We hope that this work provides a road map for organisations seeking to engage in this effort. And that it will support and guide the work of convenors, funders, stakeholders and participants in food system initiatives.

We commend the team at WWF for funding this important work.



Duncan Williamson,
Food Policy Manager, WWF UK

WWF

WWF recognises that the biggest causes of biodiversity decline and loss is attributed to the food system. In order to address this problem and reverse this decline we need to take a broad perspective; work on the immediate causes of this loss especially over fishing and the expansion of agriculture; we must also look at some of the more indirect threats such as climate change; whilst looking at underlying causes and drivers which take longer to address including demand and governance. We understand that to achieve our goals we have to engage with other sectors such as health, food poverty and food and nutrition security.

As we have taken a more systemic overview of the food system it has become clear there are many different ways to engage: local, regional, national or globally. There are a variety of different projects underway, large and small all of which have a key role to play in this transition to a sustainable food system that provides nutritious food for all, whilst leaving space for biodiversity to thrive.

This research is a key part in our evolving understanding of the food system and the role for WWF. We commissioned it to give ourselves and others a good overview of what is happening, whom is working on food systems, which areas they focus on and to identify any gaps. This information will inform WWF and others of where we can have most impact and add value, whilst avoiding reinventing what others are already doing.

The idea is this work will help us move a step closer to achieve our food goals and that it will guide the work and engagement of the relevant food system actors.

EXECUTIVE SUMMARY

Sustainable Food Systems and Diets: This review of multi-stakeholder initiatives provides insights into the current landscape of initiatives that are addressing sustainable food production and consumption. Our analysis highlights areas of activity, gaps in practice and highlights opportunities for further engagement and impact within the food system space.

KEY CONCLUSIONS:

Business and NGOs are engaged in initiatives to drive progress on a broad range of issues. There is less activity supporting food system governance and on-the-ground delivery of sustainable food systems.

Activity in multi-stakeholder sustainable food systems and diets initiatives (based on mapping of **93** initiatives) currently involves significantly more organisations from businesses (**104**) and NGOs (**77**) than from other spheres, with non-private sector actors typically leading the initiatives. A high-level analysis of the nature of businesses involvement suggests an opportunity for more businesses to engage more deeply to lead and shape initiatives. The comparatively low presence of retail, consumer organisations and food service companies in the initiatives reviewed suggests that – given the focus on issues such as consumption and nutrition – more can and should be done to engage consumer-facing business in these initiatives.

Initiatives primarily focus on climate change (**33**) and nutrition (**31**); smallholder productivity and livelihoods (**30**); and consumption (**30**) issues. Stakeholders suggest that in some cases, a focus on these complex challenges can draw attention away from less high profile or local issues (which may also be urgent and complex).

Many initiatives do not focus on the entire value chain (**only 10% do**) and there is a missing focus on the ‘governance’* (**11**) and ‘delivery & implementation’ (**28**) of new sustainable systems. Whilst this activity is potentially being carried out through non-multi-stakeholder initiative models (and hence is out of the scope of this report) there may be an opportunity for increased collaboration, in particular to drive on-the-ground projects that test sustainable food solutions.

* In the food systems context, governance refers to the rules and institutions that control/coordinate the way food is produced, processed and distributed, at international, national and local levels. It includes government, markets, and traditions, as well as non-state actors such as businesses and civil society organisations

Opportunity to define roles for improved collaboration

We see evidence of a range of organisations seeking to advance sustainable food systems. While some organisations have clear roles such as funders or aid organisations, for other organisations active in the space, focusing on where their competencies can be most effective (rather than playing many different roles in different initiatives) presents an opportunity to more efficiently drive change. Decisions on how and where to engage should be made on the basis of an understanding of the key intervention points and the opportunities for maximising impact.

Increasing alignment and engagement between initiatives requires embedding a “food systems” perspective

We believe if more organisations take a food systems perspective – including in the context of a specific geography, commodity, or issue – there will be greater collaboration and coordination of initiatives and increased impact. We encourage organisations to consider the following questions:

- 1 Where does your organisation engage with the food system?
- 2 What do you see as the most urgent issues that require intervention?
- 3 Where is the greatest opportunity for impact on this issue?
- 4 Who else is active in this space?
- 5 What’s your unique contribution?
- 6 How can you best support system level changes?

As issues develop over time, so must the approaches of those looking to address them

We expect the growth in number and scale of food system initiatives to continue in the years to come as current initiatives conclude and new initiatives launch to address a variety of emerging issues in different geographies. Given this evolving context we hope that this report serves as a timely resource for those looking to identify multi-stakeholder opportunities to drive system-level change on sustainable food systems and diets.

So, what next?

This report focuses on a subset of initiatives in the sustainable food systems and diets sphere and we recognise the opportunity to deepen this research by exploring other elements of the food system. Further insights may be gathered by:

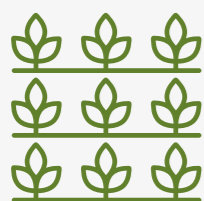
- Conducting mapping of national (China, India and Brazil are suggested as priority focus areas) and regional food system challenges and the initiatives that seek to address them;
- Scrutinising the governance and monitoring landscape to identify gaps and opportunities to embed oversight of existing and emerging issues.
- Assessing efforts towards sustainable food systems on the basis of impact and innovation.

WWF and SustainAbility look forward to driving these priorities forward and in doing so, informing the roles that our organisations and others play on addressing the challenges facing our global food system.

SUSTAINABLE FOOD SYSTEMS AND DIETS INITIATIVES: THE CURRENT STATE

UNDERSTANDING SUSTAINABLE FOOD SYSTEMS

The challenges presented by our global food system are acute.



Agriculture is the **most significant cause of deforestation** – and hence loss of biodiversity – around the world.¹



20% of total direct carbon emissions globally are from food and agriculture. When land-use change is factored in, this figure rises to **30%**.



Around **70%** of all fresh water withdrawn is used for agricultural irrigation, which in many cases has a major impact on water quality.



2.8 million people die each year as a result of being overweight or obese. Worldwide obesity has **nearly tripled since 1975**.



In 2018 **462 million** adults are underweight, whilst around **45%** of deaths among children under 5 years of age are linked to undernutrition.²



In 2007 and 2008, spikes in food prices pushed approximately **100 million people** into poverty.³

With world population projected to reach 9.8 billion by 2050 there is growing awareness of the need for a systemic approach to a sustainable food system. At its centre is the connection between sustainable diets that are good for people and planet: linking production and consumption to deliver a sustainable food system.

A food system is defined as a system that embraces all the elements (environment, people, inputs, processes, infrastructure, institutions, markets and trade) and activities that relate to the production, processing, distribution and marketing, preparation and consumption of food and the outputs of these activities, including socio-economic and environmental outcomes.

A sustainable food system is a food system that delivers food and nutrition security for all in such a way that the economic, social and environmental bases to generate food security and nutrition for future generations are not compromised.

UN High Level Task Force of Global Food and Nutrition Security

WWF's research finds that in order for what we eat and how it is produced to be sustainable and in line with, for example, the Paris Agreement's binding emissions reduction targets, the food system will need to be part of the solution. These mitigation efforts within the food industry require action and change by both producers and consumers.⁴

“Food – from what we grow, produce and catch to what we put on our plates – is the hidden cause of biodiversity loss. It's also our strongest link to nature. Reconnecting people with food is essential if we want to change the food system and build a future of healthy people and a healthy planet. For me this is the most challenging and exciting area of our work.”

Duncan Williamson, Food Policy Manager, WWF-UK ⁵

The impact of food production and consumption on the planet through impacts on biodiversity and climate change, coupled with the rise in obesity, and ongoing malnutrition crises makes work to improve the sustainability of our food systems urgent. In response there has been significant investment in multi-stakeholder initiatives that aim to address issues across global food supply chains. This growth in multi-stakeholder initiatives is necessary to drive progress at scale to address these important impacts.

This work seeks to understand the landscape of these initiatives to assess where there are strengths and gaps in global sustainable food systems initiatives. It is intended to guide the investments of project partners, funders, participants and stakeholders.

ASSESSING SUSTAINABLE FOOD SYSTEM INITIATIVES: SUMMARY FINDINGS

We identified 93 multi-stakeholder sustainable food initiatives that aim to have a food system perspective (see appendix for further details). Initiatives vary significantly in terms of the breadth of the number of issues they focus on, and the elements of the value chain they seek to engage.

8

8 initiatives were highlighted as a result of their focus on a broad range of issues (5+), all aspects of the value chain and global nature.

Table 1: Broad issue and value chain focus and global perspective

EAT-LANCET COMMISSION ON FOOD, PLANET, HEALTH
FReSH
GROW
MILAN URBAN FOOD POLICY PACT
SUSTAINABLE FOOD SYSTEMS PROGRAMME
THE PROTEIN CHALLENGE 2040

5

5 initiatives were identified that focus both on a broad range of issues and all aspects of the value chain as well as being regionally targeted.

Table 2: Broad issue and value chain focus and regional mandate

CORE (SOUTH AMERICA, ASIA PACIFIC, AFRICA)
COURTAULD COMMITMENT 2025 (EUROPE)
FOODSAF (SOUTH AMERICA)
GLOBAL FOOD SECURITY PROGRAMME (EUROPE)
PRINCE PROJECT (EUROPE)

Table 3: Breadth of issue and value chain focus

		ISSUE FOCUS		
		NARROW	MEDIUM	BROAD
VALUE CHAIN FOCUS	BROAD	Designing Food Value Chains to foster the Agenda 2030 Education Programme Food System Impact Valuation Save Food	Food Sustainability Index ReFresh The Crunch The Nordic Cities EAT Initiative Yieldwise Food Loss	Sustainable Food Systems Programme FReSH SDG2 Advocacy Hub Milan Urban Food Policy Pact GROW Global Food Security Programme EAT-Lancet Commission on Food, Planet, Health The Protein Challenge 2040 Prince Project Courtauld Commitment 2025 C40 Food Systems Network CORE FoodSAF
	MEDIUM	Scaling Up Nutrition Setting the table for our children Impacts Leadership Lab	Africa Lead Research Program on Agriculture for Nutrition and Health Food Waste Resolution Think Eat Save Food and Nutrition Technical Assistance III Project (FANTA) Tea 2030 Partnering for Innovation Sugar Smart Kickstart Food Cool Farm Alliance Pea's Please Sustainable & Healthy Food Systems (SHEFS) Sustainable diets in the context of sustainable food systems	The Food and Land Use Coalition 2020 Vision Grow Africa The European Food Sustainable Consumption and Production Round Table Punjab 2020 Sustainable Coffee Challenge Sustainable Spice Initiative: India The Food and Land Use Coalition Guatemala Highlands Alliance New Vision for Agriculture Grow Asia
	NARROW	Farm Sustainability Assessment Champions 12.3 Food 4 Life (Global Awareness Campaign) ReFed	Better Buying Lab Better by Design CSA Booster Fish for food security in city regions of India and Ghana (Fish4Food) Food For Life UK Parabere Forum Livestock, Environment And People (LEAP) Sharecity TRIFOCAL Which Pesticide? Love Food Hate Waste Mainstreaming Climate Smart Value Chains National Program to Reduce Food Loss and Waste Living Income Community of Practice Partnership For Inclusive Agricultural Transformation In Africa (PIATA) Protein to Food Open Source Seed Systems Solstice Urban food security and consumption Resource Smart Food Initiative Smallholder Finance Facility Scaling Seeds and Technologies Partnership in Africa Smallholder Performance Measurement Community of Practice Seeds of Prosperity Programme Food Loss & Waste Protocol Southern African Sustainable Seafood Initiative programme The Pig Idea Switch Africa Green Sustainable lifestyles among rural families in Zimbabwe STREFOWA Sufsans Sustainability along all value chains Sustainable Diets for All	Global Agri-business Alliance (GAA) One Planet Plate Solutions for African Food Enterprises (SAFE) Organic Food System Programme Plate2Planet Sustainable Consumption Platform Malawi Tea 2020 Seeds for Needs Trustea

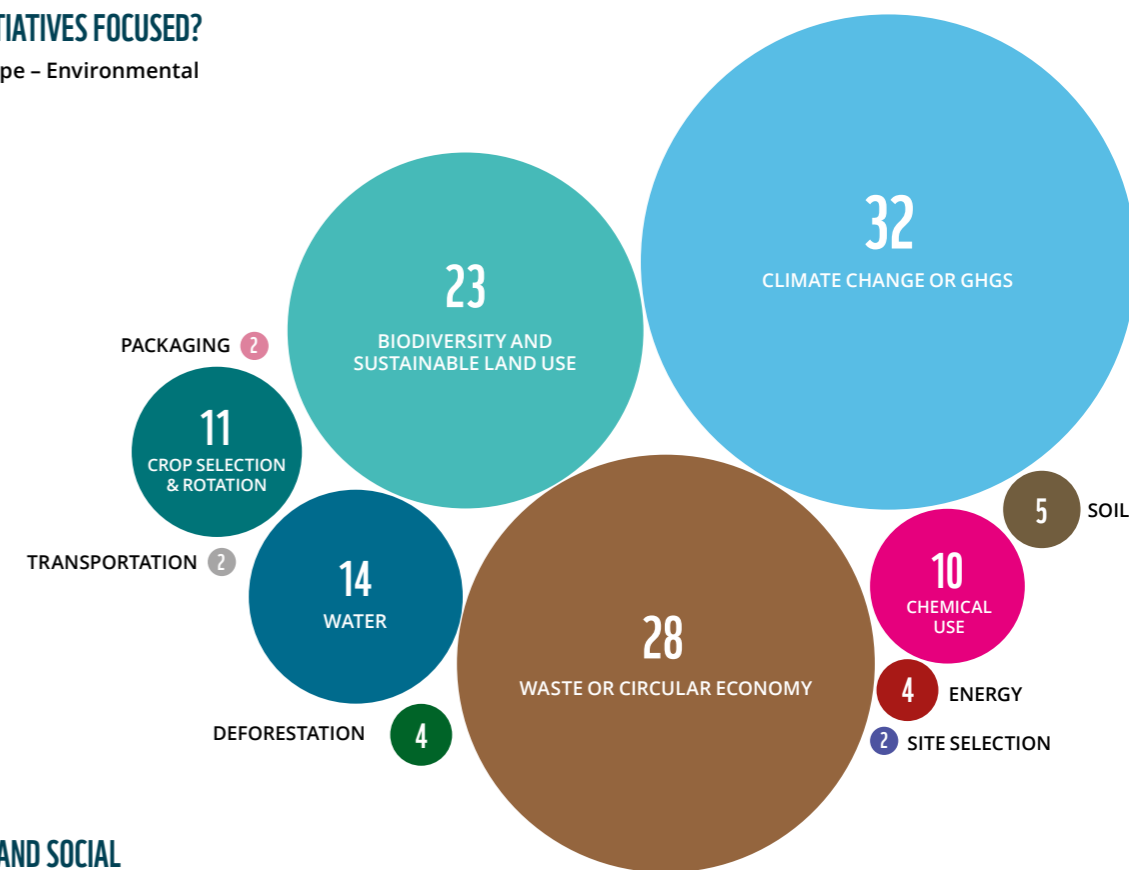


Remote controlled giant water sprinklers spray soy crops. Soy is an intensive crop primarily grown as food for livestock, meaning large amounts of water are required to help it grow.

OVERLAPPING AND UNDERPLAYED ISSUES

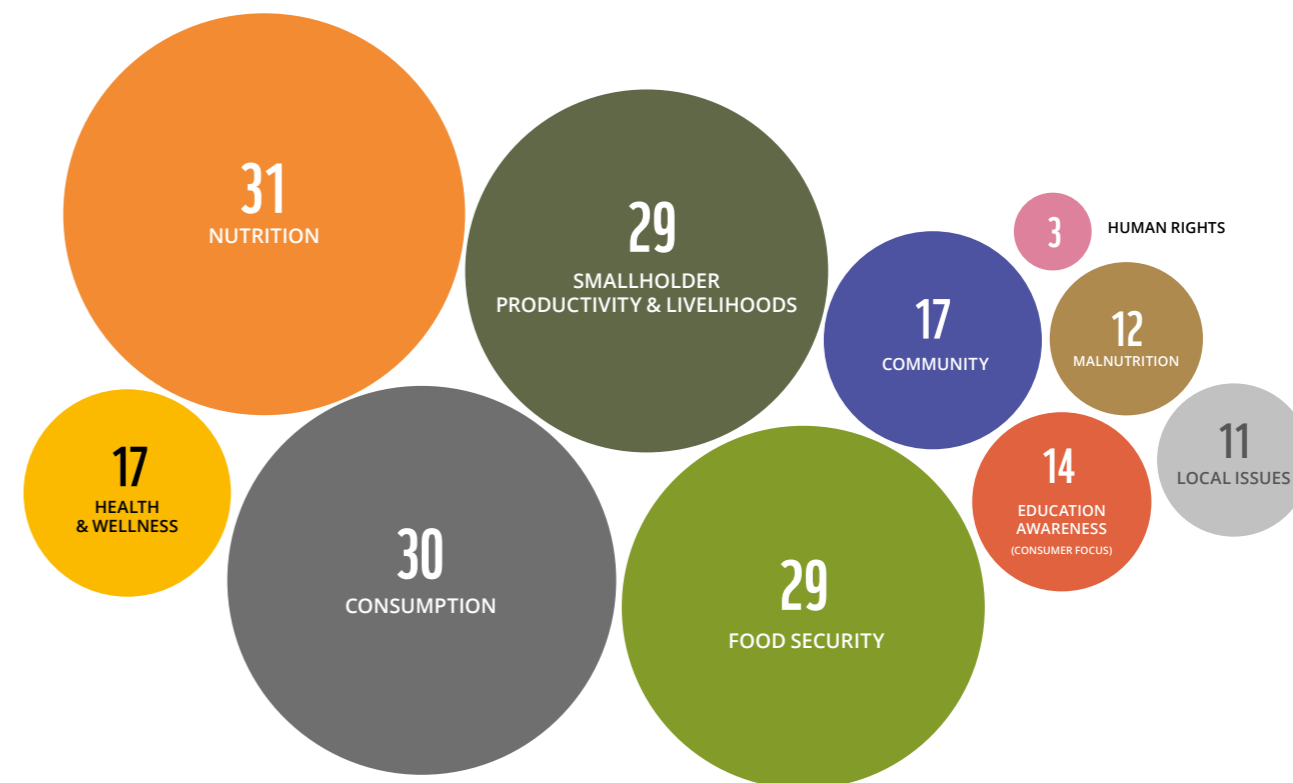
WHERE ARE INITIATIVES FOCUSED?

Chart 1: Issue type - Environmental



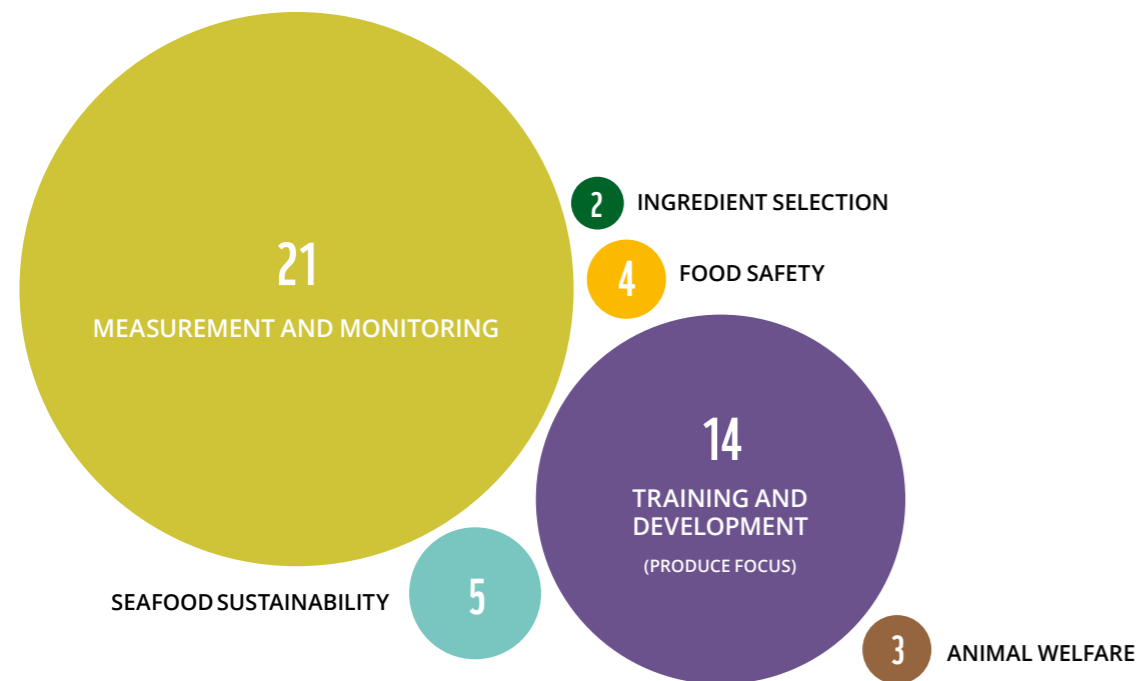
ENVIRONMENT AND SOCIAL

Chart 2: Issue type - Social



OTHER ISSUES

Chart 3: Issue type – Other



Insights and Reflections

- Globally, the reviewed sustainable food system initiatives address climate change and emissions (33), nutrition (31), smallholder productivity and livelihoods (30) and consumption (30) most frequently.
- Of the 32 projects identified as global in scope, the Sustainable Food Systems Programme (11), Milan Urban Food Policy Pact (10), EAT-Lancet Commission on Food, Planet, Health (9), The Food and Land Use Coalition (9), Food Reform for Sustainability and Health (FReSH) (8), GROW (6) and The Protein Challenge 2040 (6) address the broadest range of issues as priority focus areas.
- **Not all issues are created equally:** Assessing the primary issue focus areas reinforced that many initiatives approach systemic issues first through the lens of a particular and often complex challenge – for example climate change – and explore related issues such as biodiversity loss through that lens. Whilst there are benefits to this approach (for example supporting engagement with a broad group of stakeholders) this can reinforce the perception that certain areas are underserved. We recognise that breadth of issue coverage does not suggest greater impact.
- **Climate casts a shadow:** A focus on climate can overshadow the broader range of environmental issues facing food systems, sometimes drawing attention away from less high-profile issues such as biodiversity loss.
- **Increased focus on dietary shifts and consumption:** Some stakeholders suggested that focus on these social issues may draw attention to certain environmental issues (such as climate and land allocation) more than others (such as pollution and water use).
- **Lack of funding for agricultural diversity (across both crops and livestock):** Research funding to improve the resilience and productivity for diversified crops such as sorghum, lags behind funding for staple crops (maize, wheat, rice). A similar challenge faces research into diversity of livestock.
- **Gaps highlighted:** Transportation (2), site selection and management (2), packaging (2) and ingredient selection (2) were the least cited as issue focus areas for the initiatives reviewed. Stakeholders also highlighted a range of perceived gaps in multi-stakeholder initiatives including:
 - Initiatives to assess the increased risk of zoonotic disease spread due to changes in air and water quality.
 - Focus on cold storage / refrigeration (including during transportation) and farm level food loss and wastage.
 - Understanding of the impacts of food production on human health (e.g. through use of pesticides and antibiotics).
- Refer to the appendix (Table 5) for issues covered by individual projects analysed.

“I’m a little concerned that focus on the climate and climate mitigation has co-opted the broader discussion on the environment, where environment has now become code for climate in the absence of other critical environmental boundaries such as biodiversity, water quality, and land.”

Fabrice DeClerk,
Science Director, EAT

“Agricultural research over the last several decades has largely focused on staple crops such as maize, rice, and wheat. Consequently, research to improve the productivity of more diverse crops has been underfunded. This has created an imbalance, and there are significant productivity improvements to be made in nutrient-dense crops and livestock such as vegetables, legumes, dairy, eggs, and fish.”

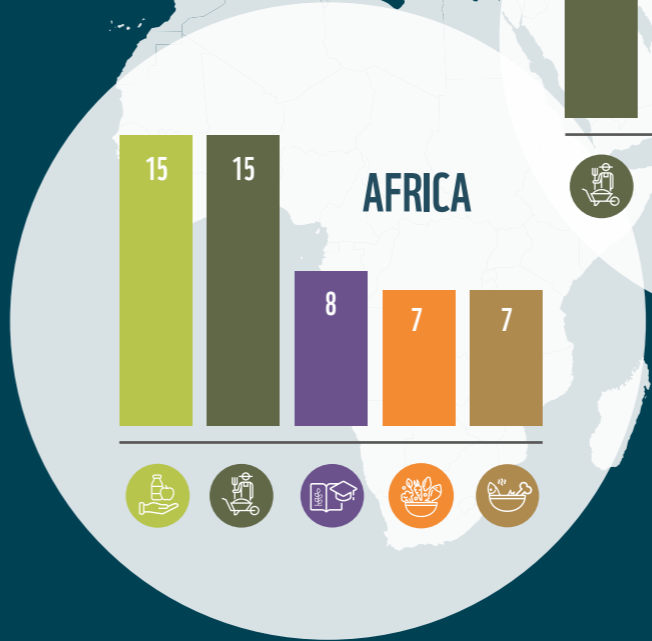
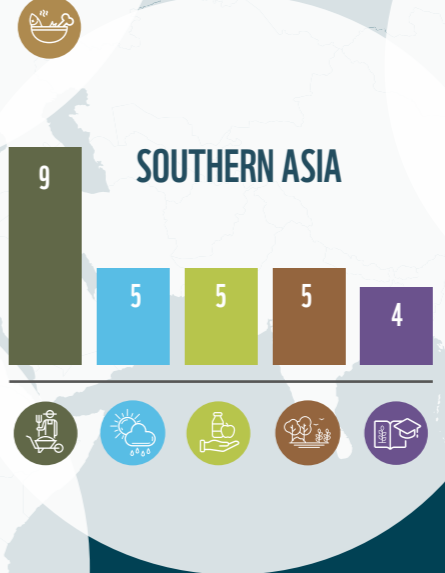
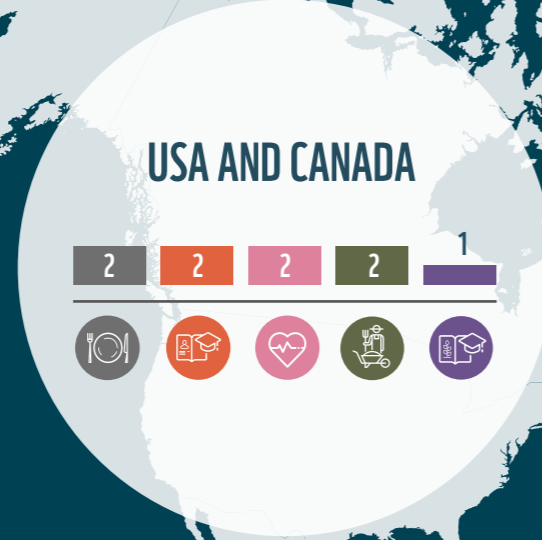
Shelly Sundberg,
Senior Program Officer, Bill & Melinda Gates Foundation

“Some of these diversified crops such as sorghum are important for food security but never going to be taken up by the market (as it is locally produced and used).”

James Lomax,
Sustainable Food Systems and Agriculture Programme Officer, UN Environment.

REGIONAL PRIORITIES ADDRESSING SUSTAINABLE FOOD SYSTEMS

-  **FOOD SECURITY**
-  **SMALLHOLDER PRODUCTIVITY & LIVELIHOODS**
-  **TRAINING AND DEVELOPMENT (PRODUCE FOCUS)**
-  **NUTRITION**
-  **MALNUTRITION**
-  **CONSUMPTION**
-  **CLIMATE CHANGE OR GHGS**
-  **WASTE OR CIRCULAR ECONOMY**
-  **EDUCATION AWARENESS (CONSUMER FOCUS)**
-  **MEASUREMENT AND MONITORING**
-  **BIODIVERSITY AND SUSTAINABLE LAND USE**
-  **HEALTH AND WELLNESS**



Insights and Reflections

- Regionally, issue focus reflects the prevalent food production and consumption system in that geography. For example, there is a focus on smallholder production in Africa and Asia, reflecting that 80% of food production here is managed by smallholders.⁶ Food Security is a top issue for initiatives in Africa, Asia and South America – suggesting that physical, social and economic access to sufficient, safe and nutritious food that meets dietary needs and food preferences for an active and healthy life continues to be a key issue.
- The focus of European initiatives reflects the different priorities impacting food producers and consumers such as sustainable consumption, climate change and food waste.
- With overlap nationally as well as between regions there may be scope to coordinate activities to implement solutions to shared challenges (particularly those that cross national boundaries).
- Cities are potential epicenters of progress on food systems. Initiatives including the C40 Food Systems Network support city efforts to create and implement comprehensive solutions that reduce carbon emissions and increase resilience in urban food systems.

“I see the topic of sustainable food systems as being well advanced in Europe, present in the US, active in Latin America but less prevalent in Asia and Africa. In Africa there remains a specific focus on caloric food security and shifting focus on to food quality is not let possible. I question whether a food security paradigm focusing on caloric security isn’t actually harmful as pushes attention onto increasing grain production. However, this narrative is changing. As important as caloric security is, it must be better integrated in whole of diet approaches.”

Fabrice DeClerck,
Science Director, EAT

“Cities are areas where we will see the biggest changes. At this level you can change policies but also are able to conduct initiatives and act as an incubator. City mayors can direct this change and promote cities as laboratories for the future.”

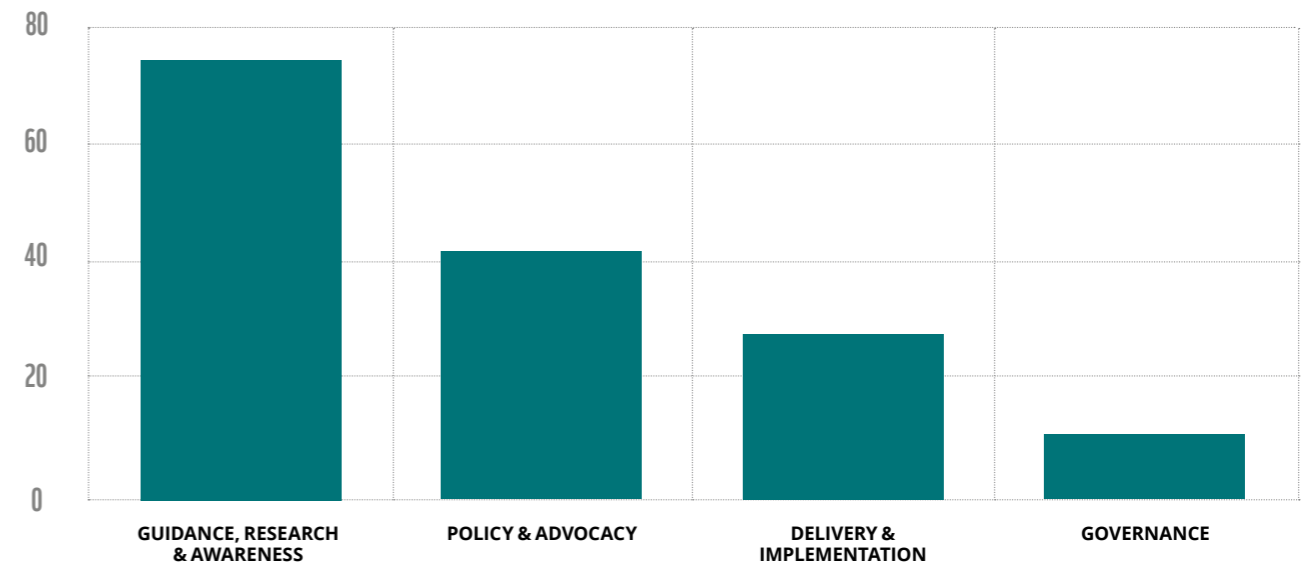
Luca Ruini,
Barilla Supply Chain Vice President, Barilla Center for Food & Nutrition

“There’s potential for coordination to address solutions that are common in groups of neighbouring countries. However, how you get these things off the ground can be quite tricky.”

Liz Goodwin,
Director Food Loss and Waste, WRI

LOTS OF TALK, LIMITED ACTION?

Chart 4: Initiative Outputs



Insights and Reflections

- The majority of Sustainable Food System initiatives offer Guidance, Research and Awareness raising (**75**) as key project outputs. This is often combined with Policy and Advocacy (**42**) work as an extension of that research.
- Fewer initiatives focus on actual delivery and implementation (**28**) - although this may reflect the multi-stakeholder nature and the global geographic scope of many of the initiatives mapped.
- Only **11** initiatives reviewed addressed governance. This may suggest more could be done to monitor food system issues. There are a number of established organisations like the Access to Nutrition Index, Access to Seed Index and the various Roundtables on Sustainable Palm Oil, Soy, and Beef that play a role in this area.

“Thanks for sharing this and now the context is clear. I have slightly tweaked it while deepening its meaning. Natural resources and especially its use will lead to increasing conflicts if we do not think about governance structures that can prevent the rise of conflicts due to increasing pressure on the availability of natural resources at local, national and/or international scale. e.g. (local level: water in Nairobi, national level: reduction of area suitable for maize production in Zambia due to climate change, international level: Ethiopia building dams with the fear of Egypt of having access to less water.”

Hugo Verkuil,
Programme Development Manager, Hivos

“There are so many reports coming out - reports do have a use, however there are too many describing the landscape rather than reports that move us forward. We need more boots on the ground – let’s pick a country and move the needle forward.”

Dr. Karen Cooper,
R&D Group Leader Sustainability, Nestlé

“There are lots of people trying to develop technology-based solutions. We need to find ways of enabling innovation to happen. You’re not going to solve today’s problems by applying yesterday’s solutions.”

Liz Goodwin, Senior Fellow and Director of Food Loss and Waste, WRI, WRI

WHO'S INVOLVED?

Chart 5: Stakeholder Groups

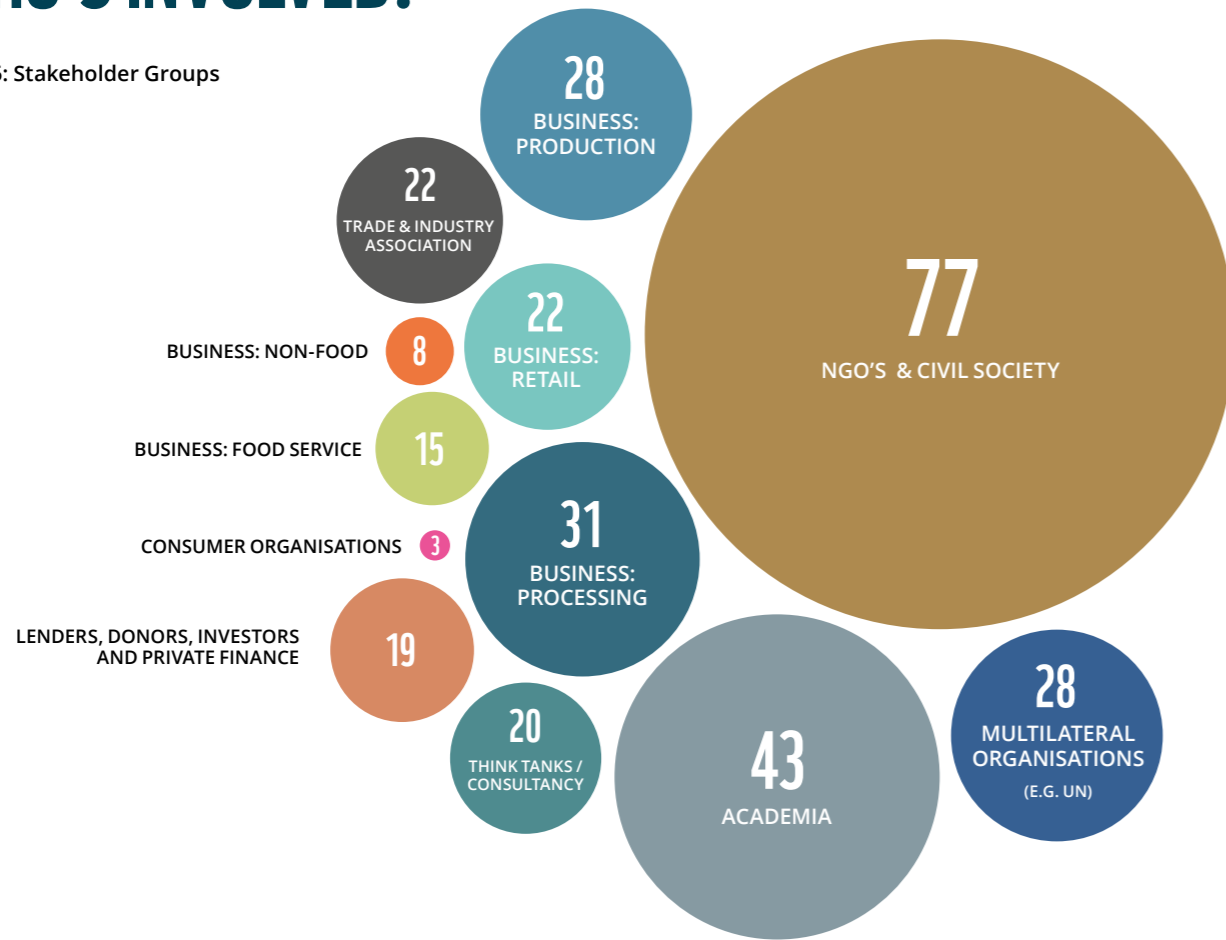


Chart 6: Lead Organisations

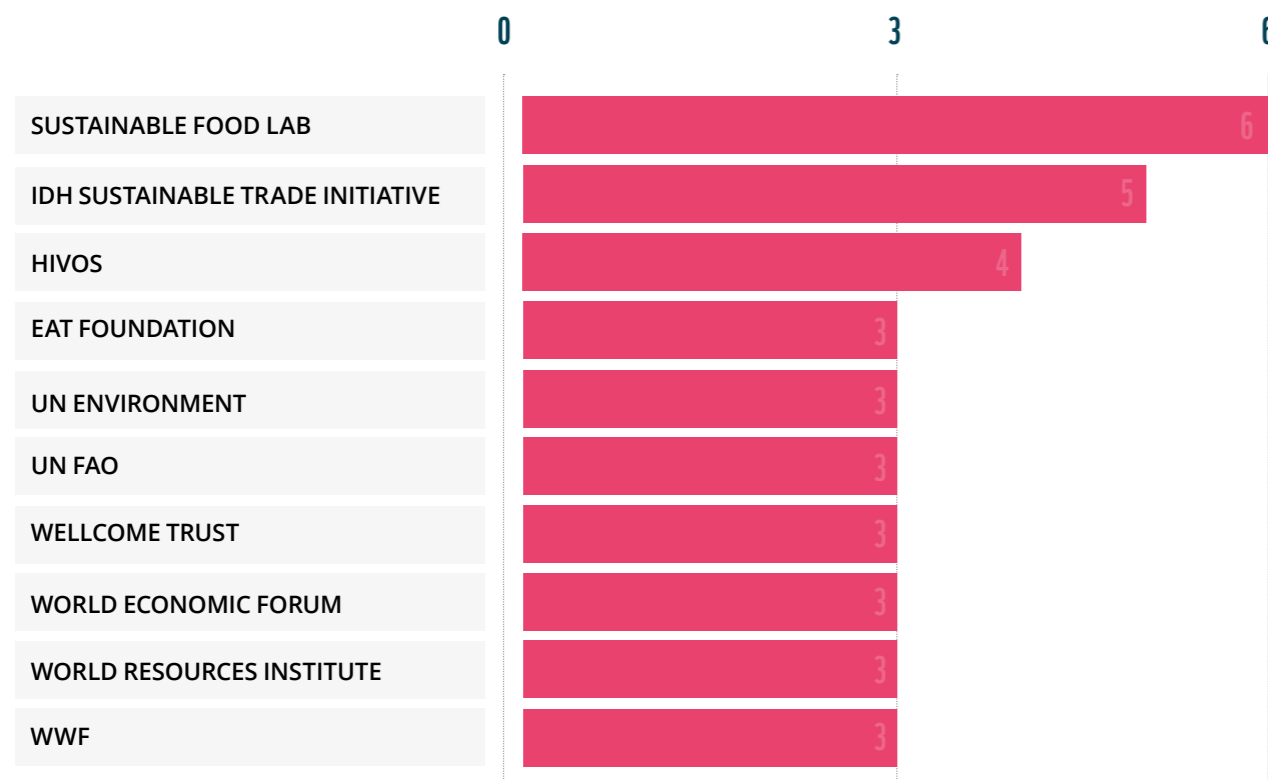
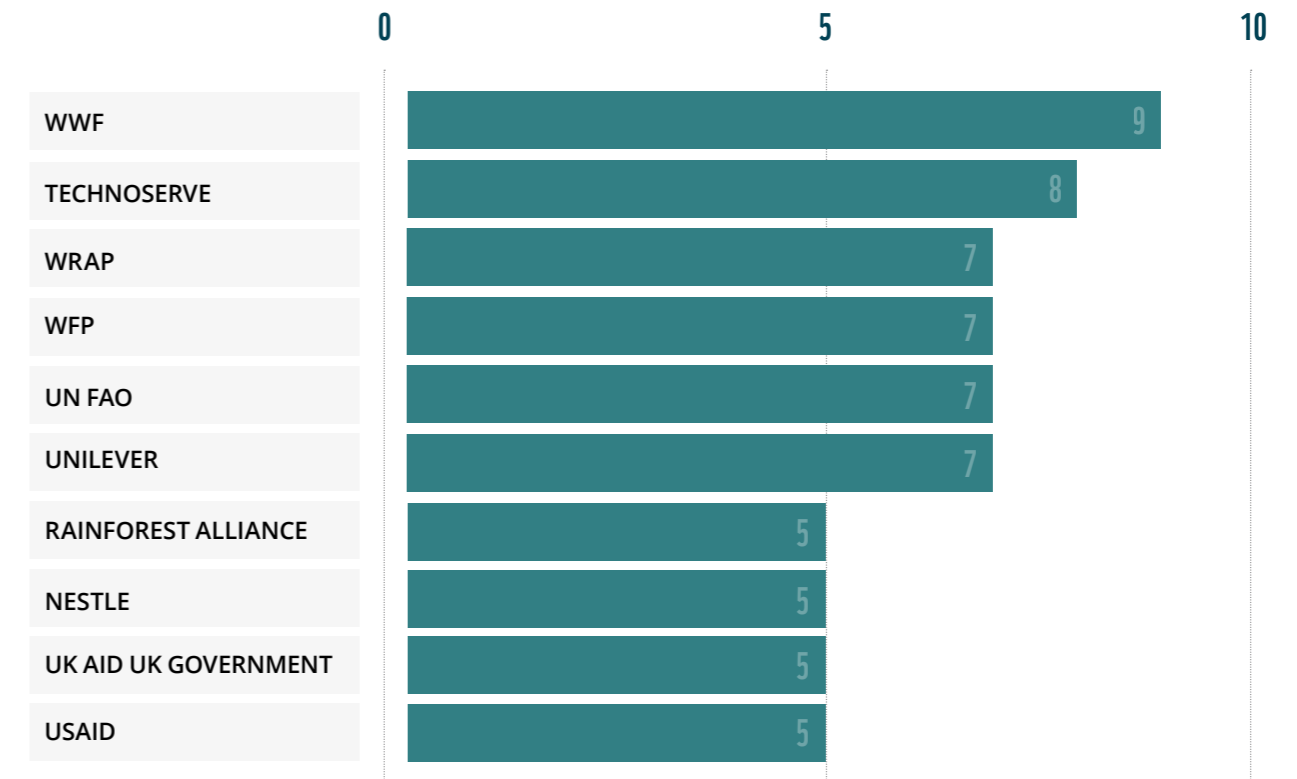


Chart 7: Initiative Partners



Insights and Reflections

- The sample reviewed suggests that in combination businesses (104 across processing, production, retail food and non-food categories) lead in terms of involvement with initiatives to drive shifts in the food system towards sustainability. Production (agriculture) and processing businesses have presence in 28 and 31 of the initiatives respectively.
- The presence of NGOs (77) in across the sample initiatives is notable, with the Sustainable Food Lab, IDH Sustainable Trade Initiative and Hivos identified as playing a lead role across several of the initiatives reviewed and WWF, Technoserve and WRAP showing appetite to engage as partners across a variety of initiatives.
- Given a sustainable food systems perspective, it is notable that retail, consumer organisations and food service companies have a relatively low presence in the multi-stakeholder initiatives reviewed, potentially suggesting that the consumer is not the end target of initiatives, despite a large number that focus on issues such as consumption and nutrition.
- Notably, businesses including Unilever and Nestlé also demonstrated strong appetite to partner on multi-stakeholder initiative approaches to sustainable food system and diet issues. However, a high-level analysis of the nature of businesses involvement suggests an opportunity for more businesses to engage deeply to shape and lead initiatives.

“Low-income consumers globally are purchasing an increasing amount of their food from food and beverage companies. We see this as an opportunity for business to improve diets and help address nutrition challenges by making their products more nutritious and affordable.”

Shelly Sundberg,
Bill and Melinda Gates Foundation

“Civil society has often struggled to engage. I’m not sure if this is because they aren’t interested in issue or this is a failure to identify the right mechanism. However, I have been quite surprised how well understood this issue can be from anyone if you adopt a food lens - climate change is hard, biodiversity too abstract but food you see three times a day.”

Fabrice DeClerk,
Science Director, EAT

AN INTERNATIONAL MOVEMENT

Chart 8: Geography



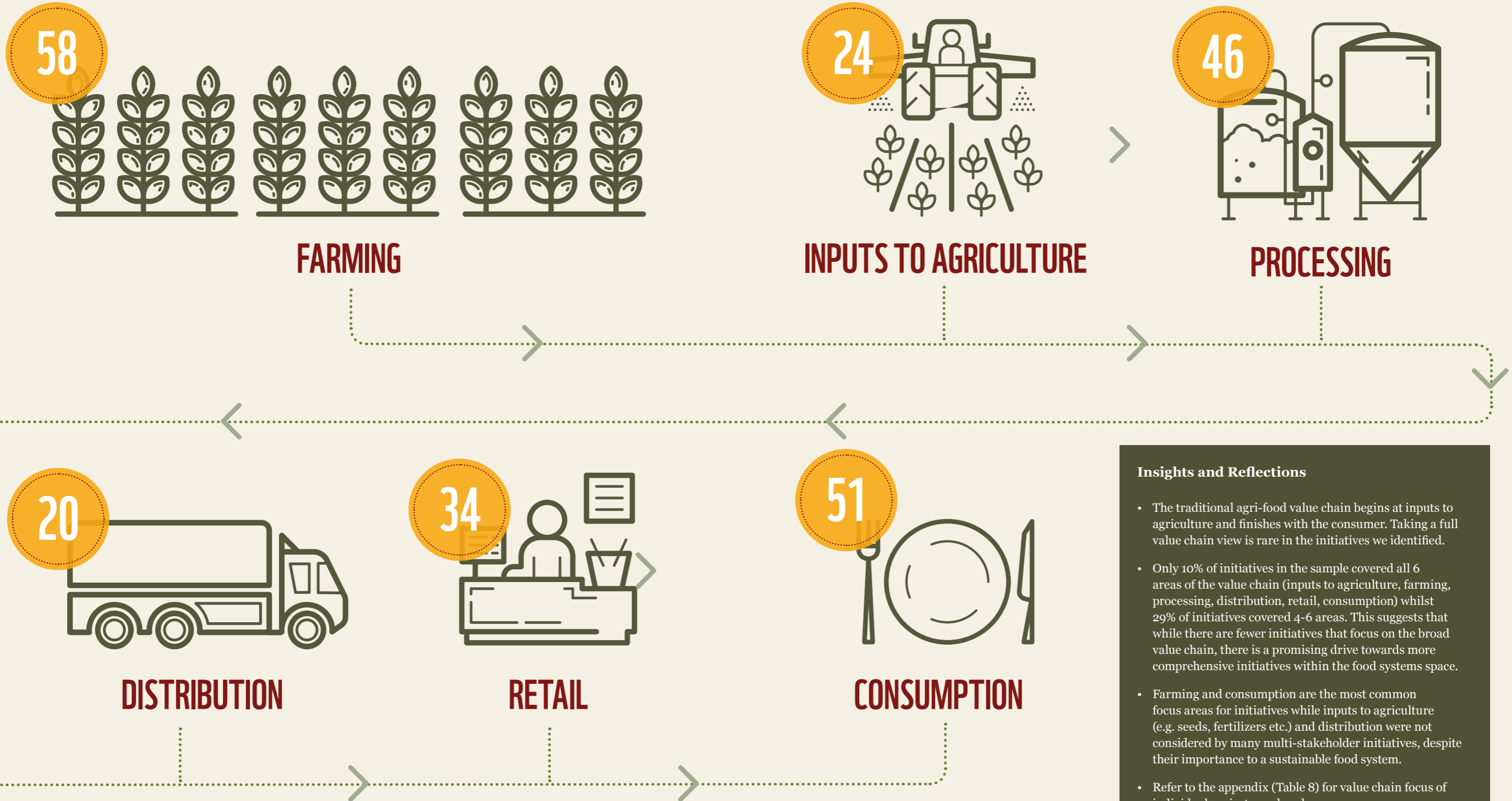
“Working in countries like China and India will be mission critical to change.”

Alison Cairns, Director, FRESH

Insights and Reflections

- 34 initiatives reviewed had an international focus - reflecting the scale and ambition of a number of existing initiatives with international partners and target countries.
- Africa-based initiatives are very common (totalling 28) reflecting not only inbound aid flows directed from large funders but also the country's smallholder farming prominence (15 of 28 initiatives focus on Smallholder Productivity and Livelihoods). 12 initiatives were focused in both Africa and Latin America, reflecting similar approaches being implemented on both continents.
- European initiatives reflect both a move by organisations such as WRAP and the Wellcome Trust to mobilise NGOs and universities to drive food sustainability across the region. It also shows the structure of funding and involvement from the European Commission and countries – 15 of 25 European initiatives include government stakeholders.
- The number of initiatives included from Asia is low, and whilst this may reflect the challenges to the identification of initiatives from these regions, anecdotal evidence suggests a comparative lack of activity. Interviews highlighted the gaps in country level activity in China and India in particular, as well as the importance of large Asian countries in driving change.
- Refer to the appendix (Table 7) for geographic coverage of individual projects analysed.

VALUE CHAIN FOCUS



Insights and Reflections

- The traditional agri-food value chain begins at inputs to agriculture and finishes with the consumer. Taking a full value chain view is rare in the initiatives we identified.
- Only 10% of initiatives in the sample covered all 6 areas of the value chain (inputs to agriculture, farming, processing, distribution, retail, consumption) whilst 29% of initiatives covered 4-6 areas. This suggests that while there are fewer initiatives that focus on the broad value chain, there is a promising drive towards more comprehensive initiatives within the food systems space.
- Farming and consumption are the most common focus areas for initiatives while inputs to agriculture (e.g. seeds, fertilizers etc.) and distribution were not considered by many multi-stakeholder initiatives, despite their importance to a sustainable food system.
- Refer to the appendix (Table 8) for value chain focus of individual projects analysed.

CONCLUDING THOUGHTS

Our review identified many initiatives seeking to identify solutions to address the multiple environmental, social and economic challenges facing our global food system with action across sectors and geographies.

The sheer number of initiatives means that there are competing demands on the attention, time and resources of stakeholders across the value chain and there is an increasing onus on organisations to work better together by aligning goals and increasing transparency.

In order to drive change, it is particularly important that initiatives engage with government and the business sector. This is particularly critical to influence behaviours at a population level. The agile nature of the corporate sector means that businesses are particularly effective agents of change and increasing business engagement to do more to lead and drive initiatives, rather than just supporting them, will be important to accelerating the pace of change.

To maximise the impact of initiatives it is helpful to understand how they relate to food system challenges and identify opportunities to collaborate to effect change at a systemic level. This might include building alignment or collaborations between initiatives targeting different parts of the value chain to increase impact.

A greater understanding of the impact of these initiatives, and the leverage points to create significant paradigm shifts (whether through breakthrough innovations or the scaling up of existing solutions) is required to ensure our global food system is fit for purpose.



ENDNOTES

1. WWF: Livewell Plates (2017).
Available at: wwf.org.uk/sites/default/files/2017-09/WWF_Livewell_Plates_Full_Report_Sept2017_Web.pdf
2. WHO: Malnutrition.
Available at: www.who.int/news-room/fact-sheets/detail/malnutrition
3. Food Price Spikes, Price Insulation, and Poverty.
Available at: elibrary.worldbank.org/doi/abs/10.1596/1813-9450-6535
4. WWF: Livewell Plates (2017).
Available at: wwf.org.uk/sites/default/files/2017-09/WWF_Livewell_Plates_Full_Report_Sept2017_Web.pdf
5. WWF: Food systems work.
Available at: wwf.org.uk/what-we-do/area-of-work/food
6. FAO: Smallholders and Family Farmers Factsheet.
Available at: www.fao.org/fileadmin/templates/nr/sustainability_pathways/docs/Factsheet_SMALLHOLDERS.pdf

APPENDIX

MULTI-STAKEHOLDER INITIATIVES: SOURCE INFORMATION

Initiative	Source
2020 Vision	www.ifpri.org/program/2020-vision
Africa Lead	www.africaleadftf.org/impact
Better Buying Lab	www.wri.org/our-work/project/better-buying-lab/about
Better by Design	www.oneplanetnetwork.org/initiative/better-design-replicating-promising-practices-tools-and-methodologies-support-and-enable
C40 Food Systems Network	www.c40.org/networks/food_systems
Champions 12.3	www.wri.org/our-work/project/champions-123
Cool Farm Alliance	sustainablefoodlab.org/initiatives/cool-farm-alliance
Courtauld Commitment 2025	www.wrap.org.uk/content/what-courtauld-2025
CSA Booster	hcsabooster.climate-kic.org
Designing Food Value Chains to foster the Agenda 2030 Education Programme	sustainabledevelopment.un.org/partnership/?p=13856
EAT-Lancet Commission on Food, Planet, Health	foodplanethealth.org/the-commission
Farm Sustainability Assessment	www.saipatform.org/activities/fsa-3
Fish for food security in city regions of India and Ghana (Fish4Food)	knowledge4food.net/research-project/fish-food-security-city-regions-india-ghana
Food 4 Life (Global Awareness Campaign)	www.oneplanetnetwork.org/initiative/food-life-%E2%80%94-global-awareness-raising-campaign-more-sustainable-food-choices
Food and Nutrition Technical Assistance III Project (FANTA)	www.fantaproject.org
Food For Life UK	www.foodforlife.org.uk
Food Loss & Waste Protocol	flwprotocol.org
Food Reform for Sustainability and Health (FReSH)	www.wbcsd.org/Projects/FReSH/FReSH-transforming-global-food-systems
Food Sustainability Index	www.barillacfn.com/en/food_sustainability_index
Food System Impact Valuation	www.eci.ox.ac.uk/news/2017/1205.html
Food Waste Resolution	www.theconsumergoodsforum.com/initiatives/environmental-sustainability/key-projects/food-solid-waste
Global Agri-business Alliance (GAA)	globalagribusinessalliance.com
Global Food Security Programme	www.foodsecurity.ac.uk/about
GROW	www.oxfam.org/en/campaigns/grow
Grow Africa	www.growafrica.com/content/who-we-are
Grow Asia	www.growasia.org
Guatemala Highlands Alliance	sustainablefoodlab.org/initiatives/guatemala-highlands-alliance
Impacts Leadership Lab	sustainablefoodlab.org/initiatives/impacts-leadership-lab
Kickstart Food	www.rabobank.com/en/raboworld/articles/growing-a-better-world-together.html
Livestock, Environment And People (LEAP)	www.futureoffood.ox.ac.uk/project/future-meat-and-dairy-fomad
Living Income Community of Practice	www.living-income.com

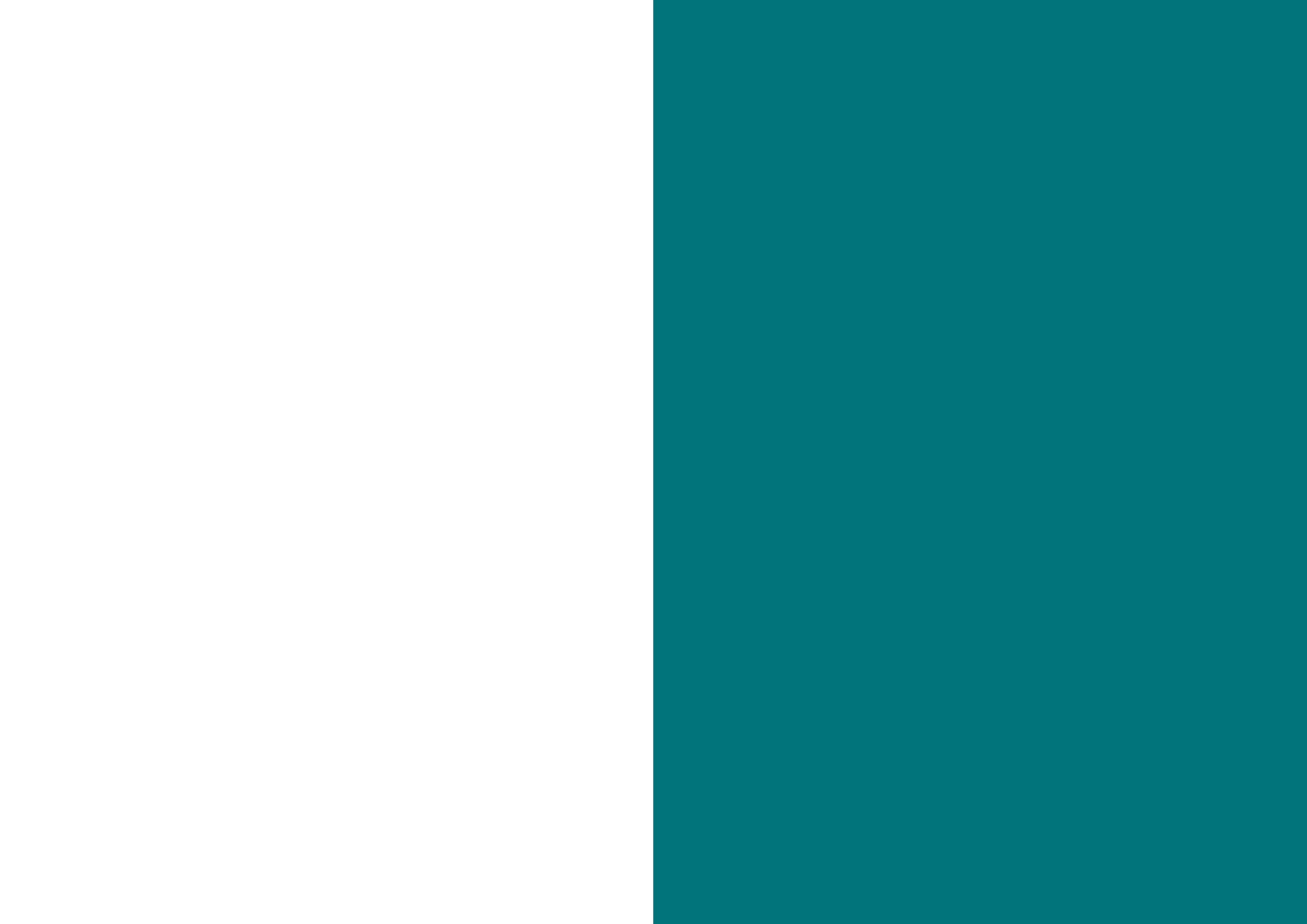
Initiative	Source
Love Food Hate Waste	www.lovefoodhatewaste.com/about-us
Mainstreaming Climate Smart Value Chains	sustainablefoodlab.org/initiatives/climate-smart-agriculture/#!/engagement
Malawi Tea 2020	www.malawitea2020.com
Milan Urban Food Policy Pact	www.milanurbanfoodpolicypact.org/history
National Program to Reduce Food Loss and Waste	www.alimentosargentinos.gob.ar/HomeAlimentos/ValoremoslosAlimentos
New Vision for Agriculture	www.weforum.org/projects/new-vision-for-agriculture
One Planet Plate	www.oneplanetplate.org
Open Source Seed Systems	www.hivos.org/focal-area/open-source-seed-systems
Organic Food System Programme	organicfoodsystem.net
Parabere Forum	parabereforum.com
Partnering for Innovation	www.partneringforinnovation.org
Partnership For Inclusive Agricultural Transformation In Africa (PIATA)	agra.org/partnership-for-inclusive-agricultural-transformation-in-africa-piata
Pea's Please	foodfoundation.org.uk/about-peas-please
Plate2Planet	www.plate2planet.co.uk/about
Prince Project	www.prince-project.se
Protein to Food	www.protein2food.eu/partners
Punjab 2020: A project for sustainable agriculture and healthy diets in India	downtoearth.danone.com/2016/09/27/punjab-2020-a-project-for-sustainable-agriculture-and-healthy-diets-in-india
ReFed	www.refed.com/?sort=economic-value-per-ton
ReFresh	eu-refresh.org
Research Program on Agriculture for Nutrition and Health	a4nh.cgiar.org/about
Resource Smart Food Initiative	www.oneplanetnetwork.org/initiative/resource-smart-food-initiative-affiliated
Save Food	www.save-food.org
Scaling Seeds and Technologies Partnership in Africa	agra.org/program-development-and-innovation/scaling-seeds-and-technologies-partnership-in-africa-2/#1500365777846-be4c71be-ca32
Scaling Up Nutrition	scalingupnutrition.org
SDG2 Advocacy Hub	sdg2advocacyhub.org/aboutus
Seeds for Needs	www.bioversityinternational.org/seeds-for-needs
Seeds of Prosperity Programme	www.idhsustainabletrade.com/initiative/seeds-prosperity-programme
Setting the table for our children	www.oneplanetnetwork.org/sites/default/files/setting_the_table_two_pager_final_june2017.pdf
Sharecity	www.sharecity.ie
Smallholder Finance Facility	www.idhsustainabletrade.com/initiative/smallholder-finance-facility
Smallholder Performance Measurement Community of Practice	sustainablefoodlab.org/initiatives/smallholder-performance-measurement
Solstice	www.solstice-wio.org/about
Solutions for African Food Enterprises (SAFE)	www.technoserve.org/our-work/projects/solutions-for-african-food-enterprises
Southern African Sustainable Seafood Initiative programme	wwfsassi.co.za
STREFOWA: Strategies to Reduce Food Waste in Central Europe	www.interreg-central.eu/Content.Node/STREFOWA.html

Initiative	Source
Sufsans (Metrics, Models and Foresight for European Sustainable Food And Nutrition Security)	sufsans.eu/about-us
Sugar Smart	www.sugarsmartuk.org
Sustainability along all value chains: identifying and promoting local initiatives linking small-scale producers and consumers	www.oneplanetnetwork.org/initiative/sustainability-along-all-value-chains-identifying-and-promoting-local-initiatives-linking
Sustainable & Healthy Food Systems (SHEFS)	blogs.lshtm.ac.uk/shefs/about
Sustainable and healthy gastronomy as a key driver for sustainable food systems [CORE]	www.oneplanetnetwork.org/initiative/sustainable-and-healthy-gastronomy-key-driver-sustainable-food-systems-core
Sustainable Coffee Challenge	www.sustaincoffee.org
Sustainable Consumption Platform	www.oneplanetnetwork.org/initiative/sustainable-consumption-platform
Sustainable Diets for All	hivos.org/focal-area/sustainable-diets-all
Sustainable diets in the context of sustainable food systems	www.oneplanetnetwork.org/initiative/sustainable-diets-context-sustainable-food-systems-core
Sustainable Food Systems Programme	web.unep.org/10yfp/programmes/sustainable-food-systems-programme
Sustainable lifestyles among rural families in Zimbabwe	www.oneplanetnetwork.org/initiative/sustainable-lifestyles-among-rural-families-zimbabwe-small-scale-conservation-farming
Sustainable Spice Initiative: India	ssi-india.org
Switch Africa Green	www.switchafricagreen.org
Tea 2030	www.forumforthefuture.org/project/tea-2030/overview
The Crunch	thecrunch.wellcome.ac.uk/the-crunch
The European Food Sustainable Consumption and Production Round Table	www.food-scp.eu/node/14
The Food and Land Use Coalition	businesscommission.org/our-work/the-food-and-land-use-coalition
The Nordic Cities EAT Initiative	eatforum.org/programmes/#the-eat-lancet-commission-for-food-planet-and-health
The Pig Idea	www.thepigidea.org
The Protein Challenge 2040	www.forumforthefuture.org/project/protein-challenge-2040/overview
Think Eat Save	www.thinkeatsave.org
Towards Food Sustainability: Reshaping the Coexistence of Different Food Systems in South America and Africa (FoodSAF)	www.r4d.ch/modules/food-security/food-sustainability
TRiFOCAL	trifocal.eu.com
Trustea	www.trustea.org/index.php
Urban food security and consumption	www.iied.org/urban-food-security-consumption
Which Pesticide?	www.sustainableagriculture.eco/projectsapp-to-support-reduction-of-pesticide-use-and-risks
Yieldwise Food Loss	www.rockefellerfoundation.org/our-work/initiatives/yieldwise

TABLE 6: Value Chain

	Inputs to agriculture	Farming	Processing	Distribution	Retail	Consumption
2020 Vision						
Africa Lead						
Better Buying Lab						
Better by Design						
C40 Food Systems Network						
Champions 12.3						
Cool Farm Alliance						
Courtauld Commitment 2025						
CSA Booster						
Designing Food Value Chains to foster the Agenda 2030 Education Programme						
EAT-Lancet Commission on Food, Planet, Health						
Farm Sustainability Assessment						
Fish for food security in city regions of India and Ghana (Fish4Food)						
Food and Nutrition Technical Assistance III Project (FANTA)						
Food For Life						
Food For Life — A global awareness raising campaign for more sustainable food choices						
Food Loss & Waste Protocol						
Food Reform for Sustainability and Health (FRSH)						
Food Sustainability Index						
Food System Impact Valuation						
Food Waste Resolution						
Global Agri-business Alliance (GAA)						
Global Food Security Programme						
GROW						
Grow Africa						
Grow Asia						
Guatemala Highlands Alliance						
Impacts Leadership Lab						
Kickstart Food						
Livestock, Environment And People (LEAP)						
Living Income Community of Practice						
Love Food Hate Waste						
Mainstreaming Climate Smart Value Chains						
Malawi Tea 2020						
Milan Urban Food Policy Pact						
National Program to Reduce Food Loss and Waste						
New Vision for Agriculture						
One Planet Plate						
Open Source Seed Systems						
Organic Food System Programme						
Parabere Forum						
Partnering for Innovation						
Partnership For Inclusive Agricultural Transformation In Africa (PIATA)						
Pea's Please						
Plate2Planet						
Prince Project						
Protein to Food						

	Inputs to agriculture	Farming	Processing	Distribution	Retail	Consumption
Punjab 2020: A project for sustainable agriculture and healthy diets in India						
ReFed						
ReFresh						
Research Program on Agriculture for Nutrition and Health						
Resource Smart Food Initiative						
Save Food						
Scaling Seeds and Technologies Partnership in Africa						
Scaling Up Nutrition						
SDG2 Advocacy Hub						
Seeds for Needs						
Seeds of Prosperity Programme						
Setting the table for our children						
Sharecity						
Smallholder Finance Facility						
Smallholder Performance Measurement Community of Practice						
Solstice						
Solutions for African Food Enterprises (SAFE)						
Southern African Sustainable Seafood Initiative programme						
STREFOWA: Strategies to Reduce Food Waste in Central Europe						
Sufsans (Metrics, Models and Foresight for European Sustainable Food And Nutrition Security)						
Sugar Smart						
Sustainability along all value chains: identifying and promoting local initiatives linking small-scale producers and consumers						
Sustainable & Healthy Food Systems (SHEFS)						
Sustainable and healthy gastronomy as a key driver for sustainable food systems						
Sustainable Coffee Challenge						
Sustainable Consumption Platform						
Sustainable Diets for All						
Sustainable diets in the context of sustainable food systems						
Sustainable Food Systems Programme						
Sustainable lifestyles among rural families in Zimbabwe						
Sustainable Spice Initiative: India						
Switch Africa Green						
Tea 2030						
The Crunch						
The European Food Sustainable Consumption and Production Round Table						
The Food and Land Use Coalition						
The Nordic Cities EAT Initiative						
The Pig Idea						
The Protein Challenge 2040						
Think Eat Save						
Towards Food Sustainability: Reshaping the Coexistence of Different Food Systems in South America and Africa (FoodSAF)						
TRIFOVAL						
Trustea						
Urban food security and consumption						
Which Pesticide?						
Yieldwise Food Loss						



COVER IMAGE: Woman dehusking and separating various grains such as millet, maize and sorghum along the road to Niassa Game Reserve from Marrupa, Mozambique, Africa.

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