Sustainable and Inclusive Supply Chains

a key business driver for food industry

BY ASITAVA SEN & BARRY LEE,
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In today’s complex environment of volatile commodity prices, changing customer preferences and emergence of developing markets, sustainability in supply chains is emerging as a key risk mitigation strategy for global food and beverages companies. The objective of this article is to present a few stories of successful interventions by IFC clients and the key benefits achieved in economic, environmental and social development. As food industry in developing countries matures, both local companies and MNC’s need to demonstrate leadership in working together with its supply chain partners and larger stakeholders in a collaborative manner. This has implications not only in their success, but in addressing the larger issues such as food security, farm gate income, rural prosperity and resource efficiency.
Challenges Faced by Global Food Industry and the Need for Sustainable Supply Chain

The global population continues to grow and is expected to surpass nine billion by 2050. That’s an additional two billion people that must be fed and clothed every day amid a growing scarcity and conflict over land, water and energy resources. According to the Food and Agriculture Organization (FAO), in order to provide adequate, safe and nutritious food to all, production must increase by at least 60%. For those working in food & agriculture, the challenges have never been greater (refer to Chart 1). These include the impacts of climate-related disasters such as droughts in Africa and Asia as well as increasing energy costs, growing waste and eco-system damage across the globe. Inefficient farming practices, including low-technology farming, complicate the picture. As illustrated in Chart 2, the situation in India, in particular, is under stress.

In other words, agriculture is expected to produce more output while reducing its impact on the natural and built environment. This will only be possible by promoting sustainability throughout the value chains, and focusing on environmental, social and economic issues. (refer to chart 3).

While the problems may seem intractable, many innovative business solutions — showcased in this article— are already delivering win-win outcomes in terms of financial returns and sustainable development. These breakthroughs of technology and ideas not only maximise productivity, but also optimise delivery across a far more complex landscape of financial, environmental and social outcomes.

Cooperation between parties in the chain that provide our daily food – including farmers, traders, processors and supermarkets – and the scientific and political communities and interest groups is essential. The private sector requires expertise, networks, appropriate solutions and valuable business partners, including financial services providers for the long term.

Ways to Build Collaborative and Sustainable Supply Chains

Globally, we see Food & Agribusiness (F&A) companies facing increasing structural pressure on their supply chains, as a result of increased price volatility, margin pressure shifting along the chain, and an increased complexity in their operating environment. This includes even external agendas such as sustainability, health/safety issues and the stress on resources from food, feedstock and biofuels.

Chart 1: Facts and Figures – Global Food Security

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage/Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in food production needed to feed more than 9 billion people by 2050</td>
<td>60-70%</td>
</tr>
<tr>
<td>People experienced chronic hunger in 2011-12</td>
<td>842 million</td>
</tr>
<tr>
<td>Percentage of world’s land dedicated to agriculture</td>
<td>38.5%</td>
</tr>
<tr>
<td>World’s freshwater used in agriculture</td>
<td>70%</td>
</tr>
<tr>
<td>Expected increase in demand for animal protein by 2050, driven by growing middle class and changing dietary habits</td>
<td>73%</td>
</tr>
<tr>
<td>Increase in productivity expected if smallholder farmers adopt sustainable agri practices</td>
<td>79%</td>
</tr>
<tr>
<td>Food produced that is wasted or lost</td>
<td>25%-33%</td>
</tr>
<tr>
<td>Demand for small farmer agriculture finance</td>
<td>US$ 450 billion</td>
</tr>
</tbody>
</table>

Source: FAO, UN and World Resources Institutes

Companies should be looking for ways to increase their control over the supply chain and align their chain with strategic growth priorities.

The traditional view of supply chains is of a zero sum game. Downstream companies (such as large food companies and retailers), who buy agri commodities, are under pressure to protect margin in a more complex environment, fluctuating global demand and volatile prices. Their dilemma is how much of the margin could be shared to secure supply. On the other hand, upstream suppliers are strengthening their negotiating position. They want higher prices to cover increasing production costs and are demanding more from a buyer in return for an assured supply commitment.

As a solution, companies should be looking for ways to increase their control over the supply chain and align their chain with strategic growth priorities. Dealing with this pressure and complexity is a common topic of discussion with senior management of F&A companies. Supply chain management has become a strategic issue – companies are engaging more deeply with suppliers and their chains. Smallholders are a particular focus.
Chart 2: India bears a disproportionate share of global agriculture burden with stressed natural resources

<table>
<thead>
<tr>
<th>Water Resources</th>
<th>Per Capita Land Availability (in Ha)</th>
<th>Per Capita Land Availability in India - Projected (in Ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>2.19</td>
<td>0.32</td>
</tr>
<tr>
<td>2.17</td>
<td></td>
<td>0.23</td>
</tr>
<tr>
<td>17.2</td>
<td></td>
<td>0.19</td>
</tr>
<tr>
<td>Population</td>
<td></td>
<td></td>
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</tbody>
</table>

Source: State of Indian Agriculture, 2011-12, Government of India

In a dedicated supply chain, F&A companies make a shared and formalised long-term commitment to working together, which generally extends end-to-end along the supply chain.

Chart 3: Interventions required to address food challenges

<table>
<thead>
<tr>
<th>Demand for food and feed could increase by 70% by mid-century,...</th>
<th>Increased productivity, quality and reduced wastage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional 2 billion people (29% growth) by 2050 and 70% increase in food production needed by 2050</td>
<td></td>
</tr>
<tr>
<td>Wastage across value chain in many emerging markets exceeds 30%</td>
<td></td>
</tr>
<tr>
<td>Reduction in agriculture production by 5% over last 20 years in Africa while increase by 140% in other developing countries</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effciency in aggregation &amp; access to finance</th>
<th>Application of recognised standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land fragmentation/predominance of small farmers in many developing countries</td>
<td></td>
</tr>
<tr>
<td>Small farmers have limited access to finance. Agri sector represents less than 5% of bank lending (by volume) in Africa</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reduction in amount of water usage</th>
<th>Adaptation to climate change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cocoa, oil palm, forestry: issues of child labour, threats to biodiversity and need for community engagement</td>
<td></td>
</tr>
<tr>
<td>Demand by external markets for sustainable, traceable and safe product</td>
<td></td>
</tr>
<tr>
<td>Agribusiness accounts for 70% of freshwater consumption</td>
<td></td>
</tr>
<tr>
<td>Forecasted 40% gap between water demand and supply by 2030 under ‘Business as Usual’ conditions</td>
<td></td>
</tr>
<tr>
<td>Stopping deforestation critical to climate change mitigation and biodiversity conservation</td>
<td></td>
</tr>
<tr>
<td>Changes in climate patterns are affecting growing seasons and severe weather is impacting yields</td>
<td></td>
</tr>
</tbody>
</table>

The winning strategy is cooperation between stakeholders in the supply chain leading to the circular economy model for the long term. The entire chain should work together to maximise the value of outputs and turning waste into new cash flow opportunities. In a dedicated supply chain, F&A companies make a shared and formalised long term commitment to working together, which generally extends end-to-end along the supply chain. It is aimed to build new levels of trust and shared ownership for innovation in the processes and products.

The defining characteristic is the commitment to work together to satisfy needs of a ‘captain’, which typically is a large downstream company – either a processor/brand owner, retailer/food services operator or exporter. It should be kept in mind that the level of integration and cooperation will vary from one commodity chain and geography to others, depending on many factors, including how tight the chain is. For example, sugar or coffee, typically have tighter integration between producers and processors, vis-a-vis cereals. As head the chain, the major processor, retailer, foodservice player or exporter acts as a captain showing leadership and providing commitment to its suppliers.

There are several proven benefits for this collaborative approach, including:

- Reduced supply risks
- Improved productivity
- Access to new markets and capital
- Enhanced brand reputation

The following case studies involving some of IFC’s global clients further illustrate the benefits of investing resources and attention to create sustainable shared ownership across food supply chains.
**CASE STUDIES**

**CASE STUDY 1**

**JAIN IRRIGATION IN INDIA – DEVELOPMENT OF JAIN GAP STANDARDS IN MANGO AND ONION SUPPLY CHAIN**

**Business Need**

Jain Irrigation System Ltd. (JAIN), an IFC investment client, is the largest manufacturer of efficient irrigation systems worldwide; as well as the largest mango puree producer in the world and the third largest dehydrated onion producer. A majority of the produce of its Foods division is exported to some of the largest food & beverages companies worldwide.

Securing regular supplies of consistent quality and quantity of agri produce for its food processing business is a strong driver for JISL’s entry into contract farming. Contract farming is enabling the company to develop a cost-effective supply chain in a market characterised by fragmented supply chains with many layers of intermediaries.

In response to its major global buyers’ concerns about food safety and increased interest in farm-level practices and traceability, JAIN decided to provide buyers assurances on the use of good agricultural practices at the farm level, specifically around pesticide use and worker health and safety, without significantly increasing costs to neither farmers nor JAIN. Such measures are necessary to maintain and grow the company’s customer base over time, and they are easier to introduce in a contract farming model given the level of monitoring required.

IFC supported JAIN to develop and pilot a “JAIN GAP” standard to apply to farmers in the JAIN supply chain. The JAIN GAP standard is a modified/simplified version of GLOBALGAP as a means to bring some measure of food safety and GAP standards to the JAIN supply base while minimising the costs of compliance to both farmers and JAIN.

**Interventions**

The Project had a two year time horizon for implementation whereby upon the project’s end, JAIN would have a successful model for applying to the rest of its direct suppliers. Specifically, the Project was to support JAIN to:

- Develop and implement the JAIN GAP standard and the related internal operational structure
- Train 70 JAIN GAP extensionists and auditors on the JAIN GAP standard
- Train 4000 contract farmers on GAP and certify 800 JAIN farmers by project’s end
- Bring 2,500 acres of farm land under sustainable JAIN GAP management

Additionally, the Project had the goal of working with GLOBALGAP to consider the JAIN GAP standard as a model for a “stepwise” approach for certifying small farmers to GLOBALGAP.

**Results**

The Project has achieved the following results:

- Almost 3,000 farmers certified on JAIN GAP by mid-2012
- Recognised as a winner of the G20 Challenge on Inclusive Business Innovation
- Use of MIS has resulted in annual yield increases between 60%-130%, and income increases between $500-$6,000 for farmers
- Estimated reduction of 500 million cubic meters of water per year through JISL drip and sprinkler irrigation, compared to flood irrigation

The project also had an impact at the sector level.

- GLOBALGAP recognises the JAIN GAP standard as a “Primary Farm Assurance” Standard
- Basic Requirement IndiaGAP Standard has been developed based on the JAIN GAP standard. The Basic Requirement IndiaGAP standard is a subset (74 of the 244 clauses) of the IndiaGAP standard. Farmers will now have a two-step approach for compliance to IndiaGAP.

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2. GLOBALGAP (earlier EuroGap) is the world’s leading farm assurance program, translating consumer requirements into Good Agricultural Practice in more than 100 countries currently.
CASE STUDY

COCA COLA SABCO IN SUB-SAHARAN AFRICA AND SOUTH EAST ASIA: INNOVATIVE AND INCLUSIVE MANUAL DISTRIBUTION CENTRE (MDC) MODEL OF DISTRIBUTION

Business Need
The Coca-Cola Company (TCCC) is the largest non-alcoholic beverage company in the world. Coca-Cola SABCO (CCS), a previous IFC client, is one of TCCC’s largest bottlers in Africa, operating 18 bottling plants and employing more than 7,900 people in Eastern and Southern Africa. Headquartered in South Africa, it is 80% owned by a private investment group and 20% by TCCC.

The Coca-Cola Company utilises a wide range of conventional distribution methods around the world. Yet in many parts of the developing world, such as in East Africa, where road infrastructure, retail markets, cost implications, and customer needs differ, other distribution methods such as bicycles to boats prevail.

Thus, Coca-Cola SABCO’s MDC model was born out of a business need to adopt its delivery model to local infrastructure, customer needs and market conditions. Through the MDC model, SABCO has been able to more effectively and efficiently reach small-scale retail outlets located in densely populated urban areas where truck delivery is challenging. Typically each MDC services an area of 1 kilometer circumference, reaching about 150 retail outlets. Most of the retailers they serve are kiosks or small stores serving neighbourhood customers, and have enough funds and space to manage a few days’ supply at the most.

Interventions
The Manual Distribution Center (MDC) approach was first developed as a pilot with 10 MDCs in Addis Ababa, Ethiopia, in 1999. By 2002, the company had implemented the successful model on a broad scale throughout its markets in East Africa. IFC investment has played an important role in enabling Coca-Cola SABCO to expand and modernise its operations in Ethiopia, Kenya, Mozambique, Tanzania, and Uganda – particularly in Ethiopia, where it was considered a pioneering investment in a country perceived to be highly risky. In Ethiopia and Tanzania, more than 80% of the company’s volume is now distributed through MDCs. MDCs are CCS’ core distribution model in Kenya and Uganda, where they are responsible for 90% and 99% of the total volume respectively. They account for 50% of volume in Mozambique and have been used to a lesser extent in Namibia and elsewhere.

Once new MDCs have been established, the most critical success factor in the model is regular training, monitoring, and communication. As many as 75% of these distributors in Ethiopia and 30% in Tanzania never owned a business before. In 2007, on behalf of the Coca-Cola Company, IFC conducted research to assess the MDC model in Tanzania and Ethiopia and generate recommendations for improving the model’s business and development impact moving forward. This research alerted SABCO to the ongoing opportunity and impact of training, financing, and women’s empowerment.

Results
The MDC model has helped CCS improve sales and customer service by providing outlets with access to smaller, more frequent deliveries of product as well as address some of the financial and space limitations they face.

The MDC model has had development impact in three broad areas.

- First, the MDC model creates new opportunities for entrepreneurship and employment in the formal sector. As of the end of 2008, Coca-Cola SABCO had created 2,200 MDCs in Africa, generating over 12,000 jobs and more than $420 million in annual revenues. Three quarters of MDC owners in Ethiopia and one third in Tanzania reported that they were first-time business owners who previously held only part-time jobs, or worked in the informal sector. MDC owners and employees support an estimated 41,000 dependents.
6.5 SUSTAINABLE AND INCLUSIVE SUPPLY CHAINS

- Second, the MDC model has created new economic opportunities for women, both as MDC owners and employees and as SABCO managers and sales staff. Across East Africa, the MDCs have created entrepreneurship opportunities for close to 300 women. In Ethiopia and Tanzania, samples showed that 19% and 32% of MDCs, respectively, were owned by women. In addition, couples own a high proportion of MDCs jointly, many of which are managed by the women.
- Finally, the MDC model has helped develop human capital. The training SABCO provides to ensure that the business is successful, benefits the MDC owners and staff members who receive it even after they leave the Coca-Cola system, helping them qualify for higher-skilled jobs and more lucrative business opportunities.

CASE STUDY 3 ECOM IN CENTRAL AMERICA, AFRICA AND ASIA: PROMOTING SUSTAINABLE COFFEE TRADE

Business Need
Originally a cotton trader, ECOM (IFC investment client) has expanded primarily into coffee and cocoa. The company is an integrated commodity originator, processor, and merchandiser, and it sells its products to branded product manufacturers, including Nestlé Group, Starbucks, Hershey, Mars, Sara Lee, Kraft, and Folgers. Now incorporated and headquartered in Switzerland, ECOM and its subsidiaries operate in 30 countries.

Given the characteristics of coffee farming in Central America, ECOM must do business with smallholder farmers. The company must also invest proactively in their development: any loss of competitiveness would threaten the company’s supply chain. Farmer competitiveness is also critical to ECOM’s access to the premium coffee markets. Demand for high-quality, certified coffee is increasing, with roasters, retailers, and consumers looking for various combinations of high quality, environmental sustainability, traceability, and social standards.

Depending on the market conditions, premiums paid for certified coffee can be significant to the growers. As of 2008, 20% of ECOM’s coffee was sold as certified. The company aims to increase this figure to 50-80% over time. This will be possible only if the smallholder farmers in its supply chain can consistently produce certified varieties in the necessary quantities, making the availability of smallholder financing and technical assistance key to the company’s long-term vision.

Demand for high-quality, certified coffee is increasing, with roasters, retailers, and consumers looking for various combinations of high quality and EHS standards.

Interventions
IFC provided both investment and advisory services to ECOM, including $25 million in debt financing and $1.5 million in technical assistance, of which IFC funded 50%.

On the grower financing side, ECOM provides seasonal credits (typically less than US$ 1000 per farmer) to its coffee suppliers in Mexico, Guatemala, Nicaragua, Honduras, and Costa Rica. These pre-payments finance the farmer throughout the production cycle, supporting the purchase of inputs like fertiliser, the maintenance of the coffee plants, and harvesting.
On the technical assistance side, ECOM works with Rainforest Alliance, a US-based NGO that promotes sustainable livelihoods, and CIRAD, a French agricultural research center, in a partnership facilitated by IFC to improve farmer productivity, sustainability, and eligibility for certification. Farmers are encouraged to improve their operations through better documentation of production processes, management of fertiliser, improved labour conditions, and other measures. The programme is also financially supported by Nestle Group’s Nespresso, which sends a strong signal to farmers about the company’s intention to purchase high-quality, sustainable coffee at premium prices and allows ECOM to work with its farmers to plan in advance the quantities that are required.

Results
The business and development results of ECOM’s inclusive business model are intimately linked. The results are:

- Increased productivity for farmers reached, in some programmes by more than 40%
- 481,606 bags of certified coffee purchased, representing $3.7 million in additional income for coffee farmers
- Increased farmer loyalty to ECOM and more stable supply chain
- Increased trade volumes of certified coffee

Encouraged by the success of the programme, ECOM estimates to work with 125,000 growers in Central America. IFC’s relationship with ECOM in Central America has led to an additional $55 million in debt financing and $8 million in advisory services to support the company across Africa (Kenya, Tanzania, and Uganda) and Asia (Indonesia, Papua New Guinea, and Vietnam). Together, these new programmes are expected to reach 80,000 coffee farmers, of which 43,000 are expected to be certified.

Business Need
The poultry sector in Nepal is estimated at $240 million and employs over 70,000 people. However, the industry loses up to $32 million every year. This loss is primarily due to the fact that local SMEs lack formal training on farm management and struggle to stay profitable.

More specifically, Nepalese poultry producers face multiple challenges like inefficient feeding practices and low quality of baby chickens—the two key inputs that together represent up to 90 per cent of their costs. Another issue is bio-security and disease management, which are critical to the sustainability of the industry. Local specialists lack adequate training and the Nepalese poultry sector needs to build capacity in these areas.

Interventions
To achieve the most impact, IFC is focused on the following interventions:
6.5 SUSTAINABLE AND INCLUSIVE SUPPLY CHAINS

- Assessing poultry feed process quality and advising on how to improve nutrition practices
- Developing a Standard Operating Practice—a good practice guide for the poultry sector aimed at increasing overall production efficiency
- Analysing bio-security and diseases in parent and grower farms, and providing industry-wide recommendations for improvement
- Training small and medium poultry farms’ staff and build local veterinarian capacity by training the trainers

Results
- 4,050 chicken growers, 42 per cent of whom are women, trained on farm management
- Trained 32 (30 per cent women) veterinarians as trainers to build local capacity

Conclusion
Each of the above cases clearly demonstrates the value of leadership in creating economic, social and environmental sustainability and value creation. The first case on JAIN GAP illustrates the importance of certification, quality and traceability to enhance export competitiveness. This is particularly important for India, which in spite of being the third-largest agri producer (by value) in the world, falls short as an exporter with the tenth position. Issues of poor farm practices, farm fragmentation, lack of traceability and inadequate storage/logistics infrastructure are some of the structural deficiencies. Given its agro climatic advantages and proximity to major food importing regions such as Europe, the Middle East and China, there is significant potential for India to enhance its position as a food exporter.

The second case study on Coca Cola SABCO illustrates the potential of rural markets and the need for innovative and inclusive distribution models for fulfilling growth ambitions. This is particularly important as the level of processing (currently only 10% of food in India is processed) grows, and FMCG companies build bottom-of-the-pyramid strategies to move mass consumption towards nutritious and cheaper processed products.

The third case study on ECOM illustrates how global food and beverage manufacturers, food retailers and foodservice companies are increasingly setting targets around sustainable sourcing, reducing water and GHG footprints, embracing sustainability certification schemes, and increasing their focus on food safety. As Asian companies enhance their global market ambition and footprint, adherence to sustainable supply chain practices will become more important.

As developing countries move up on economic development and income, the dietary pattern and consumption needs will tilt more towards value-added food and processed food. Consumption is shifting from plant-based protein to animal-based protein (milk and meat). Even newer food consumption occasions (such as snacking and eating out) are emerging rapidly. The fourth case study on Nepal’s poultry sector highlights the need for improving productivity, hygiene and modernisation of the animal protein sector to be able to match supply to emerging demand.

The growth of processed food companies, food retail/ food services chains will play a major role in consolidation and modernisation of upstream agri supply chains in Asia. It can also contribute a critical role in social integration linking producers in rural areas and consumers in urban areas. The governments need to play the role of a catalyst with favourable polices and enabling infrastructure. There is a growing imperative for all stakeholders – public, private and small holders to cooperate and collaborate to accelerate this “chain revolution” and help address issues of food security, nutrition, agricultural productivity, farm gate income and resource efficiency.
**CONTRIBUTORS**

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India Brand Equity Foundation (IBEF) is a Trust established by the Department of Commerce, Ministry of Commerce and Industry, Government of India. IBEF’s primary objective is to promote and create international awareness of the ‘Made in India’ label in markets overseas and to facilitate dissemination of knowledge of Indian products and services. Towards this objective, IBEF works closely with stakeholders across government and industry. IBEF’s efforts towards nation branding are aimed at promotion of both ‘Made in India’ products and of India as a destination for business. The website www.ibef.org has emerged as an invaluable knowledge centre for global investors, international policy-makers and world media seeking updated, accurate and comprehensive information and insights on the Indian economy, states and sectors.

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