OXFAM MEDIA BRIEFING
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Race to the top: One year of looking Behind the Brands

What's changed in a year?

The ten biggest food and beverage companies in the world are slowly waking up to their responsibilities to help tackle some immense challenges facing the global food system. Thanks to pressure from hundreds of thousands of consumers and investors managing trillions of dollars in assets, leaders are emerging from the pack. We see evidence that companies are beginning to pursue more just and sustainable policies, which will better control the impact they have on farmers, workers, communities and the planet.

The most change has occurred where consumers were organized and actively involved in calling for companies to address their failures. Nestle, Unilever and Coca-Cola have joined a race to the top on policies that help address issues like hunger, poverty, women's rights, land grabs and climate change in their supply chains. They have shown measurable progress over the last year but have a long way to go before they can truly celebrate. Associated British Foods and Kellogg have taken initial steps to catch up, but they are still among the lowest performers. Danone, Mars, Mondelez and PepsiCo were very slow improvers in 2013 while General Mills is the only company headed in the wrong direction. Overall too many companies remain stuck in the mud with policies that fail to measure up to the threats facing their industry and consumer demand for transparent and responsible corporate citizenship.

While the overall trend is pointed in the right direction, progress is far too slow. Even the leaders are only beginning to take the necessary steps to grapple with their influence on the lives of people living in hunger and poverty. To help build a world where everyone has enough to eat, more consumers will need to raise their voices to hold companies accountable for how they do business in developing countries.

Introduction

The problems facing our food system are stark: 840 million people hungry, more than one billion overweight, climate change threatening crop yields and the supply of fresh water, competition for land and water leading to conflict and unrest.[1] It is difficult even to know know where to start.

But within this system, enormous influence rests in the hands of just a few giant brands that have the power to help change the system for everyone. In a world with 7 billon food consumers and 1.5 billion food producers, no more than 500 companies control 70 percent of food choice. [2]

Just ten of those companies, the 'Big 10', Associated British Foods (ABF) Coca-Cola, Danone, General Mills, Kellogg, Mars, Mondelez International Nestle, PepsiCo and Unilever, together earn more than $1.1 billion per day.[3] Their annual revenues of more than $450 billion are equivalent to the GDP of all of the world's low-income countries combined.[4] Their supply chains are linked to every part of the system, from the farmers to consumers. Shifts in how they do business ripple throughout the world's food system.

It is with this influence in mind that Oxfam conducted eighteen months of in-depth research on the policies and practices of the 'Big 10' to understand how they are wielding power on people in developing countries who supply the land, labor, water and commodities to make their products. The initial assessment, published in February 2013, was bleak, revealing the social and environmental policies of the world's ten biggest food and beverage giants were not fit for modern purpose and needed a major wake-up call.[5]

One year later, the industry has made efforts to address some of its problems. The trends are positive, but in most cases frustratingly slow. While some companies are showing courageous leadership to bring the industry into the 21st century, others are being pulled-along kicking and screaming. Across the board no company can claim to be a full-throated voice for progress, but the race to the top is underway and there are clear leaders and laggards.

The changes in policy among the 'Big 10' are slowly translating into practice, with agricultural producers and traders beginning to improve their practices to ensure they retain the business of the major brands. Ultimately this must lead to real change in the lives of people affected by the sourcing practices of these companies around the world. Policy changes are the first step in that process.

Vocal consumers and forward-looking investors have proved the most powerful force for change. There is evidence that organized and committed people can push companies towards more responsible policies and practices.[6] The clearest examples of this are in improved company policies on land rights and women's equality, pushed through in response to Oxfam's campaigns on those issues.

Our supporters have taken nearly 400,000 actions.[7] 31 major investment funds, representing nearly 1.5 trillion dollars of assets under management have joined our call on food industry giants to do more to reduce social and environmental risks in their supply chains.[8] We all can accelerate this trend if more people mobilize to speak-out in urging companies to do things differently.

'Behind the Brands', part of Oxfam's GROW campaign, seeks to inspire a race to the top among the most powerful food and beverage companies in the world to ensure that the full force of their operations are engaged to help build a world where everyone has enough to eat.

To achieve this goal the Behind the Brands campaign:

- tracks company progress in seven fundamental areas, assessing their policies and ranking their commitment to a sustainable and just food system;
- inspires public actions bringing to light controversial practices and weak policies of the 'Big 10' and to applaud progress;
- hosts an interactive website where people can find information about company performance and take action to urge them to do better.

BEHIND THE BRANDS: FOOD COMPANIES SCORECARD

0 - 1 Very poor · 2 - 3 Poor · 4 - 5 Some progress · 6 - 7 Fair · 8 - 10 Good

Rank	Company	Score	Land	Women	Farmers	Workers	Climate	Transparency	Water	Total
1	Nestlé	64%	5	5	6	7	8	7	7	45/70
2	Unilever	63%	5	5	8	7	7	6	6	44/70
3	Coca-Cola	54%	7	6	2	6	6	5	6	38/70
=4	Mondelēz International	33%	3	5	4	3	2	3	3	23/70
=4	PEPSICO	33%	2	2	3	3	6	3	4	23/70
=6	DANONE	31%	1	1	2	3	5	5	5	22/70
=6	MARS	31%	1	4	4	3	4	4	2	22/70
8	Kellogg's	29%	2	3	1	1	4	4	5	20/70
9	Associated British Foods plc	27%	3	2	2	3	4	3	2	19/70
10	General Mills	21%	2	1	2	2	2	2	4	15/70

Updated February 2014.
The latest version of this scorecard is available at http://oxfam.org/behindthebrands

BEHIND THE BRANDS: FOOD COMPANIES SCORECARD

8 - 10 Good · 6 - 7 Fair · 4 - 5 Some progress · 2 - 3 Poor · 0 - 1 Very poor

Rank	Company	Score	Land	Women	Farmers	Workers	Climate	Transparency	Water	Total
1	Nestlé	54%	3	4	5	6	6	7	7	38/70
2	Unilever	49%	3	2	7	6	5	5	6	34/70
3	Coca-Cola	41%	1	5	3	6	5	5	4	29/70
4	PEPSICO	31%	2	2	3	3	3	4	5	22/70
5	MARS	30%	1	1	5	4	3	5	2	21/70
=6	DANONE	29%	1	1	1	3	3	6	5	20/70
=6	Mondelēz International	29%	1	2	4	4	3	4	2	20/70
=8	General Mills	23%	1	2	1	3	2	2	5	16/70
=8	Kellogg's	23%	1	2	1	2	2	4	4	16/70
10	Associated British Foods plc	19%	1	1	2	3	1	3	2	13/70

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

Notable Improvements

- 9 of the 'Big 10' improved their score (all but General Mills)
- Nestle, Unilever and Coca-Cola saw highest jump in scores (overall increases of 10, 14 and 13 percent respectively)
- 6 companies (Coca-Cola, ABF, Nestle, Unilever, Kellogg and General Mills) now have policies that commit to implementing the principles of Free Prior and Informed Consent (FPIC)
- 7 of Big 10 improved their score for women's' rights, with Mars, Mondelez and Unilever increasing by 3 points out of 10
- Two companies now have scores of 8 out of 10 in a theme (meaning they have "Good" policies on that theme) – Nestle for climate and Unilever for farmers

Who Spoke Up

- Supporters took nearly 400,000 actions asking companies change their practices
- Over 30 major investment funds (representing nearly $1.5 trillion dollars of assets under management) called on Big 10 to do more to reduce social and environmental risks in their supply chains

Some Challenges Ahead for the Big 10

- Avoid catastrophe on climate change
- Proactively identify and address major problems in the supply chain
- Lift the "veil of secrecy" that shrouds supply chains
- Pay a sustainable price for commodities
- Protect rights and give people a voice throughout the supply chain

Off the starting blocks

A good way to assess whether companies are committed to sustainable and responsible practices is to look at their corporate policies. The Behind the Brands scorecard ranks companies for how their publicly available policies address seven areas that are critical to sustainable agricultural production, but have been historically neglected by the industry: women, smallscale farmers, farm workers, water, land, climate change and transparency.

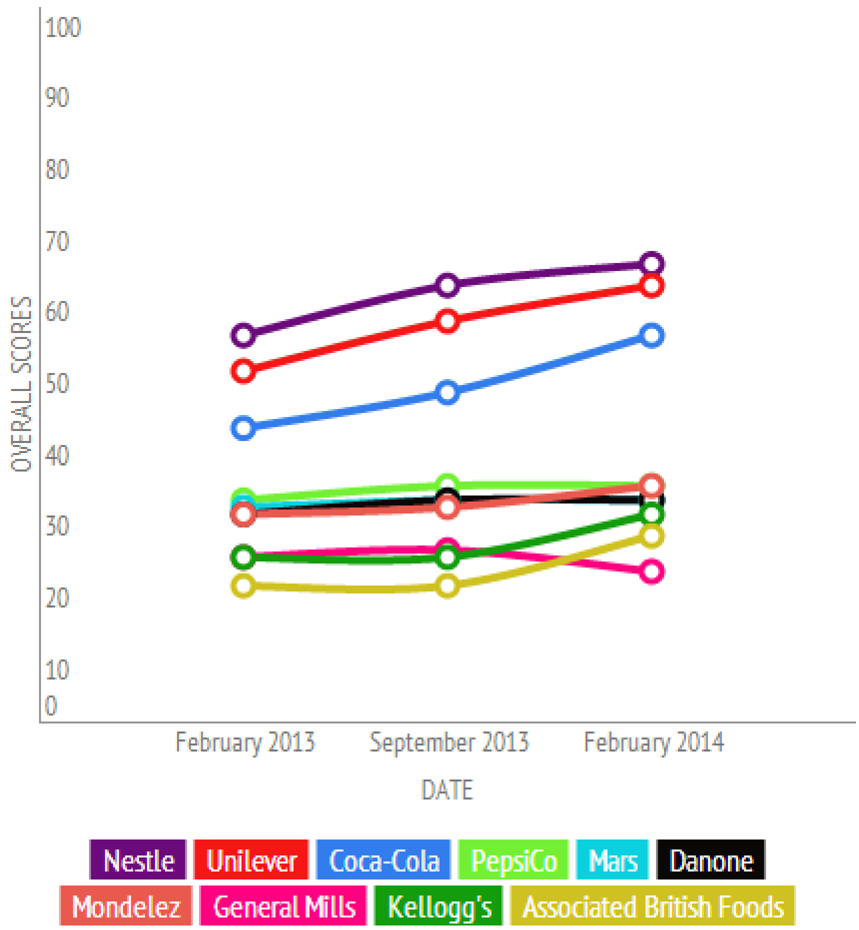

Figure 1- Change in Overall Scores February 2013- February 2014
Make this graphic interactive: http://infogr.am/behind-the-brands-overall-company-scores

With the exception of General Mills, all companies have improved their overall scores since February 2013. (See Fig 3.) The top three performers - Nestle, Unilever and Coca-Cola - all saw the highest jump in scores with overall increases of 10 percent, 14 percent and 13 percent respectively. Associated British Foods and Kellogg saw more moderate increases of 8 percent and 6 percent respectively. But it was not enough to break those companies out of the bottom rung, alongside General Mills. The companies in the middle of the pack - Danone, Mars, Mondelez and PepsiCo - saw the slowest growth. General Mills dropped to last because of improvements to the scoring methodology that led to small drops in the company's score.[9]

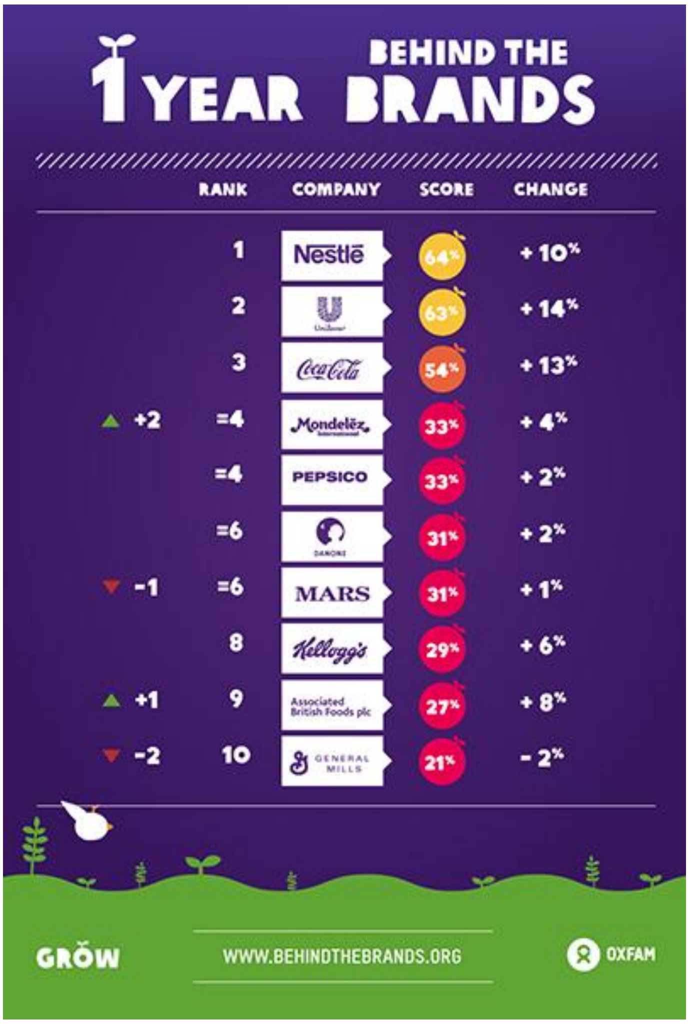

Figure 2- Change in ranks February 2013- February 2014
Full scorecard avaialble at www.behindthebrands.org/scorecard

While the scores did influence company ranks, the general grouping of companies remained fairly consistent. Nestle and Unilever remain competetive for the top spot on the scorecard. Mondelez improved its position from 6th to 4th, tied with PepsiCo. Mars – which barely improved its score – dropped from 5th to 6th, tied with Danone. Associated British Foods improved from 10th overall to 9th. General Mills, the only company to have a lower overall score in 2014 than 2013, now ranks the worst of the 'Big 10'.

The most significant improvements in company policies came on the issues of land, equality for women and climate change. "Behind the Brands" focused its public campaign on two of these issues in 2013, seeking to put them on the mainstream agenda of corporate responsibility. One year ago, land rights and women's equality were being largely ignored by the 'Big 10'. Twelve months on, we are seeing these companies take unprecedented steps to protect community land rights and to support women's empowerment. Meanwhile, the progress made on climate is thanks to increased disclosure by companies in response to the Carbon Disclosure Project's efforts, which have galvanized investors and companies to increase transparency of climate emissions.[10]

This shows that organized public campaigns can play a critical role in pushing companies to make progress in changing their policies and practices . And it shows that through working jointly with other organizations to ensure the voices of those most affected can be amplified and heard. But not all scores have improved. Companies have done little over the last year to improve conditions for small-scale farmers. Their policies remain among the weakest in this area. The scores also indicate that companies have paid little attention to increasing transparency and communicating what they are doing to improve conditions for farm workers, and to address the impacts of their operations on communities' access to clean water.

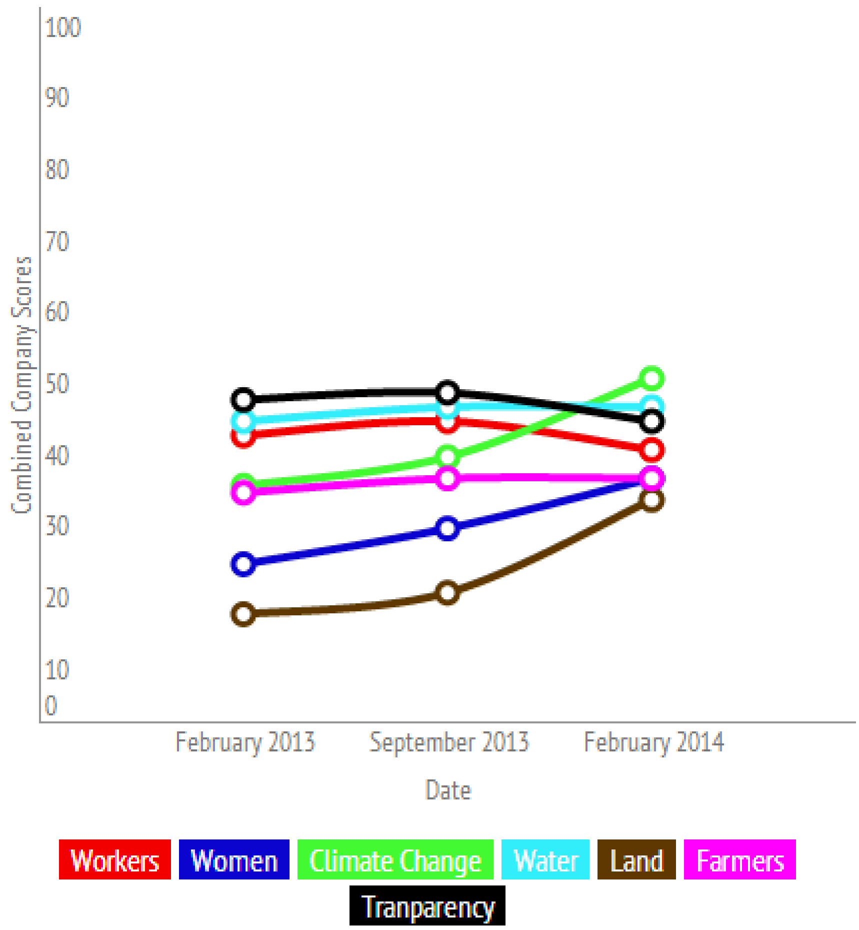

Figure 3- Combined Company Scores by issue February 2013- February 2014
Make this graphic interactive: http://infogr.am/behind-the-brands-combined-scores-by-issue

At the beginning of 'Behind the Brands', in February 2013, there were no issues where any company could be classified as having "Good' policies across the board (i.e. scoring 8 or above). There are now two companies achieving this. Unilever, with its score of 8 for farmers, has shown true leadership in pursuing supply chains that are inclusive and fair for smallholder farmers. Nestle, scoring 8 for good climate policies, continues to lead in adjusting its policies for the realities of climate change. And Nestle, scoring 8 for good climate policies, are sending the right message to other companies and political leaders about the value of climate action. Ultimately these policy changes must be translated into improve practices within company supply chains.

More on the methodology behind the scorecard

A complete description of the methodology and every indicator assessed in the scorecard is available at www.behindthebrands.org/about. The scorecard looks at company policies to measure whether they are proactively understanding and addressing the issues in their supply chains. It was developed through consultation with industry experts, Oxfam staff and the companies themselves. Each company has had multiple opportunities to challenge the indicators underpinning the scores as well as the assessments themselves. All the companies have engaged with the process, with all but one giving substantive feedback that helped us improve the scorecard.

The scorecard rewards openness and is intentionally based only on public information. This is for two reasons. Firstly, disclosing information builds accountability for brands and for their suppliers and allows communities and consumers to know how companies are putting their rhetoric around sustainability into practice. Being transparent about policy and supply chain information gives communities the ability to hold companies accountable for how they are treated in supply chains. Secondly transparency allows other actors in the industry to adopt solutions to major problems, to act in a coordinated manner and learn from their peers.

Entering 2014 Oxfam has strengthened the methodology based on feedback from industry experts and companies themselves. Overall, scores have gone up in the last year, but we've seen some individual scores drop in transparency, workers, farmers and water, in part due to these changes to the methodology.

The explanations for score decreases vary. In transparency, we've begun to score companies on their disclosure around tax transparency. Here, companies by-and-large do poorly. In the workers theme we've improved the way we assess the critical issue of living wage, again, an area where companies are struggling to make progress. On farmers' rights we've strengthened our focus on whether companies are pursuing a 'living income' for farmers, and found many of the companies are lacking solutions. And in the water theme PepsiCo and General Mills stopped requiring key suppliers to report on their water management, while Danone made no public improvements over the last year.

On gender, we found a new way to reward companies that invest into understanding the impacts they have on women in their supply chain, rewarding them for making these assessments more meaningful. On land and climate, the major change was moving the deforestation indicators over to the climate change theme from the land theme. We also included some new questions that look at whether companies are taking steps to implement any commitments to stop deforestation in palm oil production, where deforestation is a critical concern.

Industry trends

Land

The biggest change over the first year of Behind the Brands is that companies are beginning to recognize and respect the land rights of communities. In October 2013, Oxfam launched its campaign to urge the industry to demand zero tolerance for land grabs in its supply chains. We targeted the three companies with the largest footprint in sugar (Coca-Cola, PepsiCo and ABF), a commodity that is among the most linked to large-scale land acquisitions.[11]

The campaign successfully put land rights squarely on the industry's agenda. Hundreds of stories in media outlets like the New York Times, the BBC, CNN and national news outlets from Brazil to the Netherlands highlighted cases of land grabs in the supply chains of major brands. More than 270,000 people took action including signing petitions, posting messages to company Facebook and Twitter pages, and gathering in person at company headquarters and industry events around the world sending a powerful message that companies could not ignore.

The pressure has led to a significant shift in the industry with several companies introducing new policies that aim to better protect the land rights of communities in their supply chains.

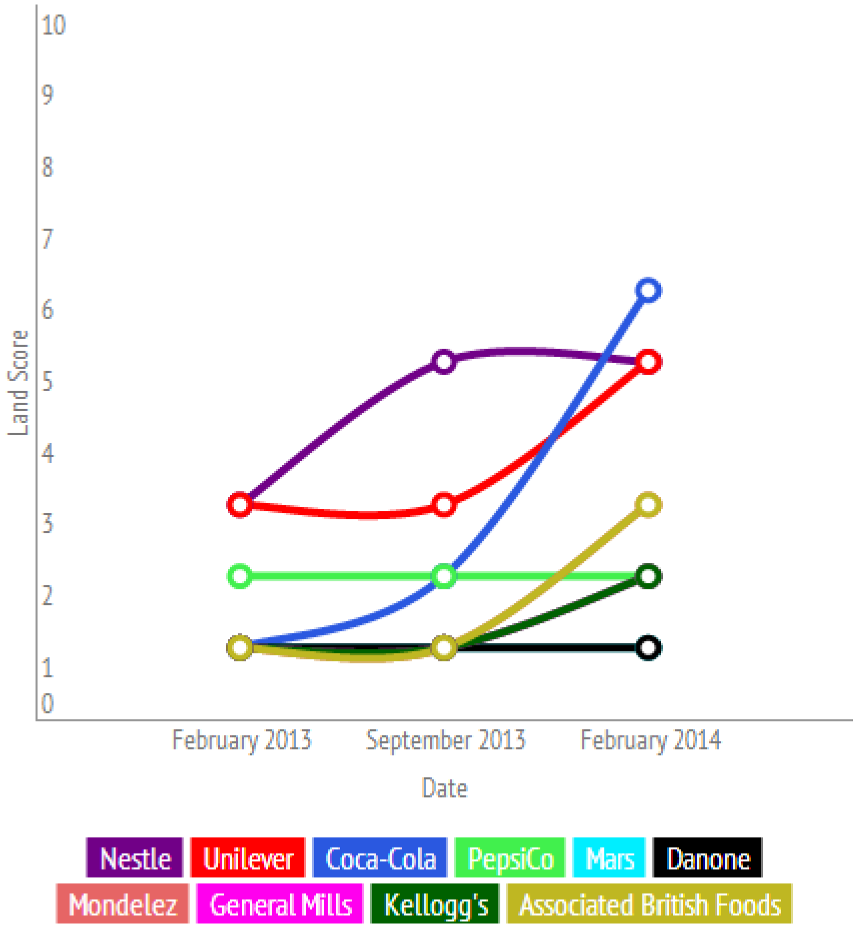

Figure 4- Company scores on Land February 2013- February 2014
(Note exact score overlaps: Mondelez/ABF, General Mills/Kellogg, Mars/Danone)
Make this graphic interactive: http://infogr.am/behind-the-brands-land-scores

Coca-Cola, whose land score increased from 1 to 7, is the most impressive example of the positive trend. Its declaration of zero tolerance for land grabs has made it clear to Coca-Cola's suppliers that it would no longer overlook land grabbing in its supply chain.

"Our partners in Brazil have been working to get their land back for decades," said Simon Ticehurst Oxfam's Country Director in Brazil. "New commitments to zero tolerance for land grabs from companies like Coca-Cola are opening up the space to help communities resolve these conflicts once and for all."

Coca-Cola is not alone. Unilever, Nestle, ABF, General Mills and Kellogg all instituted new policies that endorse the principle of Free Prior and Informed Consent (FPIC). Oxfam is also talking with PepsiCo to secure similar promises to implement greater protection of land rights across its supply chains. FPIC helps to ensure that communities are consulted and must give consent before the land that they use is sold. As a result of these commitments, any company wishing to do business with these six major global brands must begin to follow stronger standards when doing land deals or else face significant risks to their contracts.

Communities around the world are struggling to retain their land rights. These commitments align the interests of the consumers of the brands halfway around the world with those of farmers who are fighting to provide for their families. The fact that high-profile and influential companies have publicly committed to addressing these issues means communities can hold the suppliers of these companies accountable if these policies are not effectively implemented in their supply chain.

Already communities in Cambodia, Thailand, India and Brazil are capitalizing on Coca-Cola's commitments to pursue better land policies, by highlighting cases where the company's suppliers have been caught up in land deals that have hurt local people. For example in October, 2013, the Brazilian state prosecutor announced an official investigation into a land grab highlighted as part of Oxfam's campaign, and communities in Cambodia have begun talking to the Cambodian government and the local company responsible for stripping farmers of their land.[12][13] Increasingly companies will need to proactively engage with communities to ensure their actions are matching their promises.

"Conflicts over land are endemic in Cambodia," said Chris Eijkemans, Oxfam's Country Director in Cambodia. "Vocal support for community land rights from some of the most powerful companies in the world has already helped communities seeking fair compensation for the land that was taken from them nearly a decade ago."

Women

In February 2013, the Behind the Brands campaign launched with a call to the three biggest chocolate companies, Mars, Mondelez and Nestle, to tackle inequality facing women in their supply chains. The industry has long-neglected the issue of women's equality. While corporate headquarters have tried to begin to level the playing field for women in corporate headquarters, those same protections have not trickled down to the workers and farmers who grow the ingredients to make their products.[14]

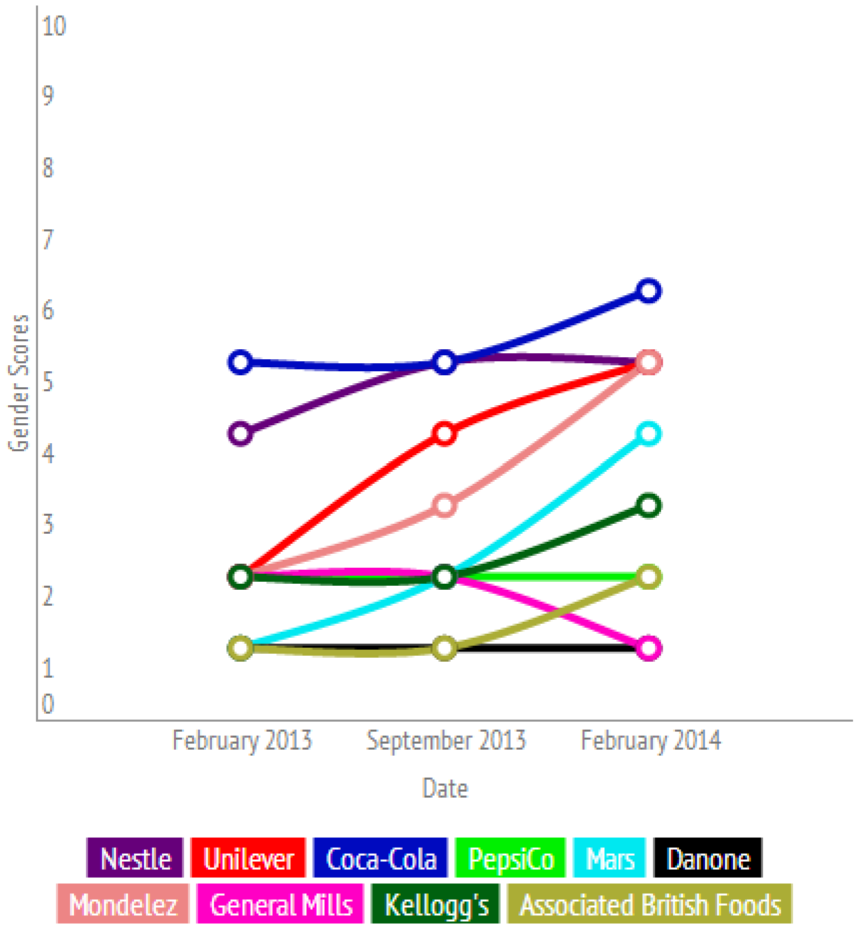

Figure 5- Company scores on Gender February 2013- February 2014
Make this graphic interactive: https://infogr.am/behind-the-brands-gender-scores

Thanks to actions by over 100,000 people, companies have started to understand that they need to pay special attention to address the systematic and entrenched problems facing women in agricultural supply chains.

Nestlé, Mondelez and Mars each made important commitments to begin understanding and eliminating some of the specific challenges women face in their supply chains, particularly in cocoa. All three companies are publishing impact assessments on the conditions facing women in their supply chains and by May 2014 they will release action plans announcing specific commitments for how they intend to address gender inequities.[15]

Unilever improved its score by making efforts to tackle the relative lack of access that women have to training, finance, land rights and water. It also signaled its intention to invest more in understanding the specific challenges women face. Those four companies and Kellogg signed up to the UN Women's Empowerment Principles, a commitment at the highest level of the company to improve conditions for women impacted by their business. Coca Cola and PepsiCo had previously signed these principles.

As small-scale farmers, women are systematically prevented from gaining equal access to loans, land and markets.[16] Companies must not only understand where these issues are most prevalent in their supply chains but also be part of the solution. While companies have gotten off the starting blocks and are headed in the right direction, no company has come close to a "Good" score. Gender equality must go beyond rhetoric and be incorporated into company's supplier codes and business models. Companies need to use their power to ensure that leveling the playing field for women becomes a priority for their suppliers.

Climate

Thanks to growing attention from investors and the public, several of the 'Big 10' are taking steps towards recognizing the threat that climate change poses to their industry. A race is emerging to see who will take on the mantle of corporate leadership on climate change. Nestle, after increasing its score to 8, is the clear front-runner but PepsiCo, Unilever and Coca-Cola have all improved.

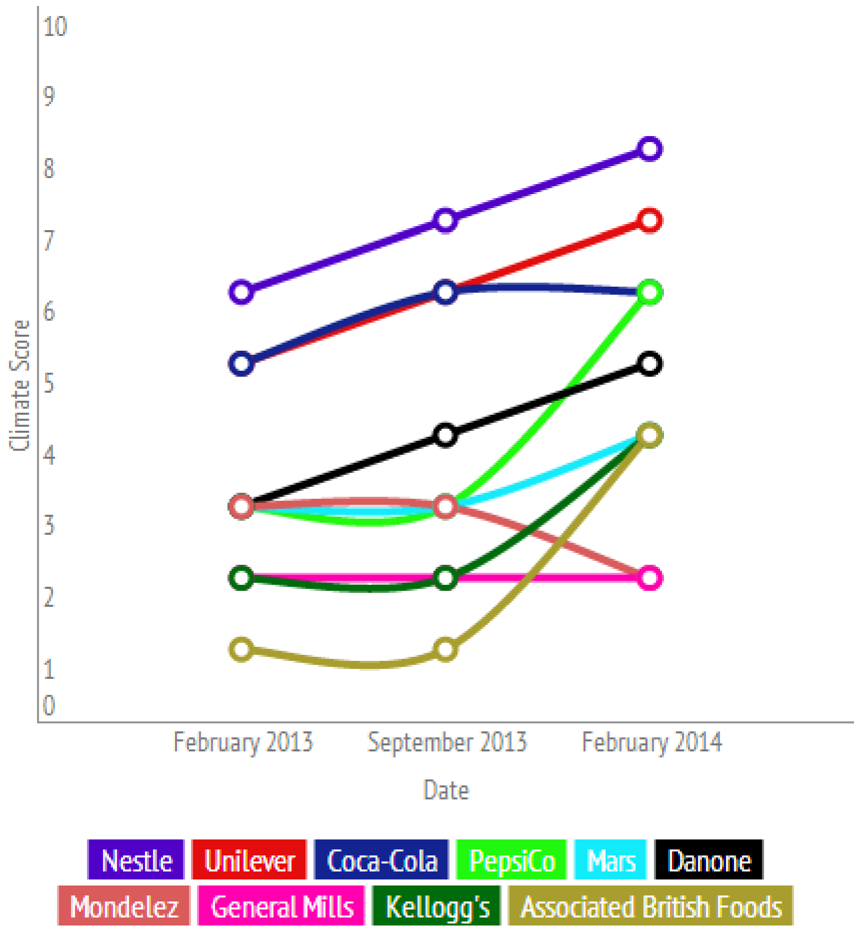

Figure 7- Company scores on Climate February 2013- February 2014
Make this graphic interactive: http://infogr.am/behind-the-brands-climate-scores

Most of the improvement is thanks to increased disclosure by companies in response to the Carbon Disclosure Project's efforts, which has galvanized investors and companies to improve transparency of their emissions. Disappointingly, Mondelez's score on climate actually dropped during the year, because it stopped disclosing whether it has set absolute targets to reduce GHG emissions and what that target is. Mondelez also stopped disclosing climate change risks throughout its supply chain. Conversely PepsiCo and Nestle improved because they are beginning to ask their suppliers to do more to address climate issues and to help small-scale farmers adapt to changing climate conditions.

But the scale of the climate challenge is far surpassing efforts by the industry, particularly the low performing companies like General Mills, Kellogg, ABF, Mars and Mondelez, to help forge solutions.

Extreme weather events like the Philippines typhoon and the historic drought in California offer worrying examples of what could be in store for global supply chains if the food industry does not do more to reduce emissions and help break the strangle hold the fossil fuel industry has on our global political system. 2014 must be a year of bold climate action from the industry.

A race to the middle?

While we saw impressive improvements on women's rights, land and climate change, we didn't see the same level of movement in the workers, farmers and water themes (see Figure 4). Apart from Coca-Cola's 2 point jump in water thanks to new policies aimed at preventing water pollution and protecting water in stressed areas, no company rose more than a point on any of these themes. In some cases, companies even went backwards.

On water and workers issues, companies had already taken some of the easier steps to strenghten their commitments. For instance, a year ago, most companies had already recognized the International Labor Organization's labor rights conventions and were disclosing key water information through the Climate Disclosure Program's Water Program.[17] But a year later, PepsiCo remains the only one of the 'Big 10' to recognize the United Nations Human Right to Water, and none of them has set a specific target to reduce total water use.

We have seen few improvements in the past year on the issues that keep many workers poor – particularly wages and precarious employment. Only ABF asks suppliers to pay workers a 'living wage' and only Unilever has committed to reduce precarious employment in its supply chain. Meanwhile, we improved how "Behind the Brands" assesses whether companies are committed to a 'living wage', the issue that workers around the world tell us is their largest concern. Until companies start tackling the tougher issues linked to water and workers in their supply chains, their performance on these themes will keep stagnating.

On farmers, four companies, Danone, General Mills Nestle and Unilever, slightly improved their performance over the year. Unilever remains the leader here, helping hundreds of thousands of smallholders link into their global supply chain across several commodities. However, we believe that no company is making strong enough commitments on some tough issues that are important to farmers, such as receiving a 'living income' and ensuring that the risks of production are shared between them more fairly.

Transparency is a slightly different picture. Nestle continues to lead the pack. While companies have started to disclose a little more about where and from who they source ingredients, in no small part because of active campaigning by Oxfam and others to push for greater disclosure, companies continue the archaic practice of hiding basic information from the public about how they operate. They will not improve on "transparency" – and in so doing increase the levels of trust and accountability with all their stakeholders – until they stop this practice.

The updated scorecard now assesses a critical new component of transparency – taxes – focusing on whether companies disclose information on tax reporting, including their use of tax havens. People and coproations using tax havens are depriving the world of more than $150 billion in lost revenue, enough money to end extreme poverty twice over.[18] Oxfam aims to identify which companies are most open about their tax dealings to bring sorely needed accountability to this issue.

Apart from Unilever and Coca-Cola, the companies fail miserably in disclosing their tax dealings.This helped drag the transparency scores of four companies down 1 point, with only Unilever slightly improving its score on transparency over the course of the year, although not yet matching Nestle's score.

What's next for the 'Big 10'

The Behind the Brands scorecard offers hundreds of detailed recommendations for companies to improve their policies and strengthen their commitment to sustainable and responsible operations. So far it has taken a campaign of consumer advocacy to shake these companies into recognizing they must address these issues urgently. The savviest leaders however should be pre-empting risks to their brands by tackling these issues now before they face inevitable criticism later. Anyone with a twitter account can now demand answers from companies about how their products are produced. The companies are being forced to respond.[19]

2014 must be a year of action to build on areas of improvement and bring attention to areas where progress has stalled.

Here are five key priorities that deserve focus:

Avoid catastrophe on climate change:
We have reached a tipping point. Without urgent action, the world will be unable to prevent climate change from having a disastrous impact on people's ability to grow and buy enough food. Already companies are seeing their operations damaged by extreme weather. The 'Big 10' must take bold action on climate change by reigning in their own emissions and those of their suppliers, helping their producers prepare for climate uncertainties, and start being far more vocal themselves in calling for political action. The food and beverage industry must help break the stranglehold that fossil fuel interests have on our political system by standing up to articulate the risks that climate change poses to the global food system and leading on efforts to forge solutions. Oxfam and Behind the Brands will increasingly draw attention to the need for the Big 10 and others to help avoid a catastrophe on climate change.

Proactively identify and address problems:
Too many companies continue to shy away from being open about the size and shape of the problems they face. Some of the 'Big 10' have begun conducting 'human rights impact assessments,' which is a great step forward. The UN Guiding Principles on Business and Human Rights, which are quickly becoming the consensus on how responsible companies approach human rights, ask companies to be proactive in doing due diligence to understand how their supply chains impact local communities. It is no longer acceptable for them to wait passively for problems to pop up. Too many companies are still struggling to show they know where the problems are in their operations and they remain uncomfortable in opening up their supply chains to scrutiny. The first step to tackling any problem is to understand it. Companies must be more open and honest about their efforts to understand and address problems. This can and should include working with communities, other companies and influential actors in the industry. Ultimately this will help boost companies' bottom lines, improve productivity and build efficient, stable and high performing supply chains.

Lift the veil of secrecy:
A true commitment to responsible, sustainable operations requires companies to be transparent about where they source their ingredients, with whom do they do business and how they are influencing the effective operations of governments around the world. Companies must be more forthcoming about their efforts to lobby governments and whether they are paying their fair share of taxes. Overall, increased transparency will allow consumers to judge whether the changes in policy lead to real change on the ground for those impacted by the supply chains of these companies.

Protect rights and give people a voice throughout the supply chain:
For the most part, the 'Big 10' food and beverage companies do not interact directly with the farmers and laborers who grow their ingredients. But companies are increasingly being held accountable for the conditions at every point on the supply chain and they have immense leverage to help ensure suppliers are fulfilling their brands' values. Companies must do more to mandate that their suppliers are respecting rights in contracts and supplier codes, and giving voice to the people who grow their ingredients. They must incentivize good practice from their suppliers and ensure that policies laid out at the corporate level are being adequately implemented on the ground. Whether it's workers having a say in their working conditions through collective bargaining, farmers being able to control their destiny through producer organizations, or women being able to seize opportunity equally and raise concerns via women's organizations, there are many ways the 'Big 10' can use their power to give people with little power a real voice.

Pay a sustainable price:
Even as most of the ‘Big 10’ move vaguely in the right direction, there is one issue that companies, politicians and consumers still have to face: the true cost of sustainable production. The ‘Big 10’ are making commitments across a number of important areas from women’s equality to respecting land rights. While it’s important that they are clear about their expectations of themselves and their suppliers, addressing these issues does not come free of charge. In some circumstances it may cost more in the short term to grow ingredients in a way that respects rights, pays farmers and workers fair prices and a living income, and protects the planet. But the farmers who grow the ingredients capture a tiny amount of the value of the prices paid by consumers, with cocoa farmers receiving as low as 3.5 percent of the price of a chocolate bar, coffee growers receiving as little as 7 percent of the price of coffee in supermarkets and tea farmers getting as little as 1 percent of the price of tea.[20] With so little of the final price going to the farmers, ensuring farmers get a fairer and more sustainable price for their product won’t necessarily require consumers to pay. It can be covered by a marginal shift in how value and profits are shared between farmers and the rest of the food system. In the long term these investments will reduce costs, ensure supply chains remain stable and will help to form sustainable and profitable businesses models. Ensuring prices paid allow sustainable production (ie; a sustainable price) will create better, more stable and more loyal supplier relationships for the ‘Big 10’. We will watch keenly to see who moves first on this critical issue.

Conclusion

The single most important lesson to be taken from the first year of looking “Behind the Brands” is that companies do respond – and can do so quickly, and to great effect – when consumers take an active role in pushing them toward more responsible methods of production. These changes can have both short and long term benefits for communities impacted by food company supply chains.

More tools are available than ever for consumers to voice their opinion and to demand answers from companies. When supporters spoke out about land rights and women’s inequality, six of the ‘Big 10 improved’ how they respect land rights and five boosted their efforts to empower women in their supply chains.

It cannot be emphasized enough that no company is too big to listen to the people who buy its products. The areas where companies have shown the most progress are the areas where most consumers became mobilized to demand action. The race to the top has begun, but keeping that momentum will require renewed commitment from consumers to hold companies accountable.

In 2014 we must accelerate these changes and focus on areas like climate change that require urgent attention from the industry to protect their own interests and the interests of people around the world. The industry can and must be mobilized as a leader in the fight for climate action.

"There is no doubt that the policies of the ‘Big 10’ are shifting in the right direction because of consumer pressure,” said Monique van Zijl, campaign manager for Behind the Brands. “We are already seeing this translate into practice with agricultural producers and traders beginning to improve their practices to ensure they retain the business of the ‘Big 10’. We will keep working to ensure that shifts in policy are implemented and lead to real change in the lives of people around the world affected by the food industry."

Notes

[1] http://www.wfp.org/hunger/stats

[2] http://www.behindthebrands.org/en//~/media/Download-files/bp166-behind-brands-260213-en.ashx

[3] Ibid

[4] Ibid.

[5] http://www.oxfam.org/en/grow/pressroom/pressrelease/2013-02-26/ten-biggest-food-beverage-companies-failing-millions-people

[6] http://www.oxfam.org/en/grow/pressroom/pressrelease/2013-03-25/oxfam-food-company-campaign-delivers-win-women-cocoa-farmers; http://www.oxfam.org/en/grow/pressroom/pressrelease/2013-04-23/mondelez-international-agrees-address-womens-inequality-chocolate; http://www.oxfam.org/en/grow/pressroom/pressrelease/2013-11-08/coca-cola-company-declares-zero-tolerance-land-grabs-supply-chain

[7] www.behindthebrands.org (see action counter)

[8] http://www.oxfam.org/en/grow/pressroom/pressrelease/2013-09-17/investors-push-food-industry-giants-urgent-action-transparency

[9] Entering 2014 Oxfam has strengthened the methodology based on feedback from industry experts and companies themselves. In transparency, we've begun to score companies on their disclosure around tax transparency. On farmers rights we've strengthened our focus on whether companies are pursuing a 'living income' for farmers while for workers we improved the way we assess how companies approach the issue of low wages (specifically what they say and do on 'living wage'). On gender, we found a new way to reward companies that invest into understanding the impacts they have on women in their supply chain, rewarding them for making these assessments more meaningful. On land and climate, the major change was moving the deforestation indicators over to the climate change theme, from the land theme. We also included some new questions that look at whether companies are taking steps to implement any commitments to stop deforestation in palm oil production, where deforestation is a critical concern.

[10] CDP is an organisation that works with shareholders and corporations to disclose critical information about greenhouse gas emissions and water impacts. It does this through requesting information from companies through a series of questions on behalf of investors. It makes this information available to the public and Oxfam has used it as an important part of our assessment of company performance in the water and climate themes.

[11] http://www.oxfam.org/sites/www.oxfam.org/files/bn-sugar-rush-land-supply-chains-food-beverage-companies-021013-en_1.pdf

[12] http://www.oxfam.org/en/grow/pressroom/pressrelease/2013-10-29/brazilian-state-prosecutor-investigate-land-grab

[13] http://www.cambodiadaily.com/news/ministries-to-help-farmers-hurt-by-sugar-plantations-51971/

[14] http://www.oxfam.org/sites/www.oxfam.org/files/equality-for-women-starts-with-chocolate-mb-260213.pdf

[15] http://www.behindthebrands.org/en-us/campaign-news/women-cocoa-roadmap

[16] http://www.fao.org/worldfoodsummit/english/fsheets/women.pdf

[17] https://www.cdp.net/en-US/WhatWeDo/CDPNewsArticlePages/cdp-launches-global-water-disclosure-project.aspx

[18] http://www.oxfam.org.uk/blogs/2013/05/tax-haven-cash-enough-to-end-extreme-poverty

[19] http://www.nytimes.com/2013/12/31/business/media/social-media-as-a-megaphone-to-push-food-makers-to-change.html?_r=0

[20] http://www.fairtrade.org.uk/includes/documents/cm_docs/2013/F/FT_smallholder_media_report_2013_v3.pdf