



The sustainability of agri-food imported in Belgium

How can Belgian authorities pave the way towards more sustainable global agri-food supply chains?

REPORT
SUMMARY

Summary

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Introduction

Food production is today the main cause of environmental impact on a global scale:¹ agriculture occupies approximately 40% of the Earth's land surface, and food production is responsible for 30% of global greenhouse gas emissions as well as 70% of freshwater use; the conversion of natural ecosystems to cropland and pasture is the main factor threatening species extinction. **In socio-economic terms, the situation is equally bleak:**² although most agricultural sectors are globally profitable, the terms of trade for producers have deteriorated over the past decades. The gap between agricultural prices and prices for consumers has continued to widen and, in the countries of the South, small producers find themselves excluded from markets with higher added value. As recognised by the World Bank,³ **globalised value chains bear a major responsibility for this environmental and social degradation**, despite the Gross Domestic Product (GDP) growth they have helped to generate in many countries.

In this context, national, European and international initiatives has been multiplied in recent years, on the part of the authorities and the private sector, on the sustainability of international agri-food value chains, in particular around the issues of decent income, respect for human rights, and the fight against deforestation. In line with these various initiatives, the Social Responsibility working group of the Interdepartmental Commission for Sustainable Development (CIDD) of the Belgian Federal State has drawn up a **proposal for a federal strategy called "Beyond Food,"** in 2020, which aims to "contribute to a transition of the agri-food sector towards sustainable food import chains, through the empowerment and cooperation of all the actors concerned in Belgium." In this context, the Federal Institute for Sustainable Development (IFDD) wished to clarify the "Beyond Food" strategy proposal by **carrying out an in-depth analysis of international food and agricultural chains in Belgium** from the perspective of sustainability, in order to prioritise those on which progress and transition should be made in ecological and social terms.

The analysis commissioned by the IFDD from the **BASIC consortium, University of Antwerp (Law and Development Research Group), and the Fair Trade Advocacy Office (FTAO)** aims to:

1. **List the various international agri-food sectors, whose products are imported into Belgium** from the countries of the South
2. **Identify the main potential issues in terms of sustainable development on these international agri-food value chains**
3. **Identify and analyse the various public and private initiatives as well as legislative tools that already exist in Belgium and in Europe**
4. **Develop a weighting framework to prioritise import sectors in Belgium** according to their sustainability risks, (potential) levers to make them more sustainable, and potential links with Belgian Development Cooperation countries
5. **Propose initiatives and policy recommendations** that can be taken by the Federal Government

This summary synthesises the main results detailed in the research report, written by the BASIC-FTAO-University of Antwerp consortium.

¹ Willett, Walter, Johan Rockström, Brent Loken, Marco Springmann, Tim Lang, Sonja Vermeulen, Tara Garnett, et al. "Food in the Anthropocene: The EAT–Lancet Commission on Healthy Diets from Sustainable Food Systems". *The Lancet* 393, No. 10170 (2019): 447–92. [https://doi.org/10.1016/S0140-6736\(18\)31788-4](https://doi.org/10.1016/S0140-6736(18)31788-4)

² IIED, hiVos and Mainumby Ñakurutú, *Small producer agency in the globalised market*, 2012; Oxfam, *Ripe for Change: ending human suffering in supermarket supply chains*, 2018

³ World Bank, *World Development Report 2020: Trading for Development in the age of Global Value Chains*, October 2019

The global impact of imported food in Belgium

The project has made it possible to identify 16 main international agri-food value chains imported into Belgium for human and animal food, in order to analyse their social and economic impacts.

Products imported from non-OECD countries

To identify the main agri-food products imported into Belgium, for human food or agrofuels, the project analysed Belgian customs data for the year 2019⁴ (reference year chosen because it predated the Covid-19 crisis).

	Imports into Belgium (2019)	
	VALUE	VOLUME
Total imports from all countries	€28.3 billion 100%	38.2 million tonnes 100%
... of which direct imports from countries not OECD	€2.5 billion 8.9%	3.3 million tonnes 8.7%
... of which imports from European Union member countries	€23 billion 80%	32.6 million tonnes 86%

The analysis made it possible to consolidate the import figures by major sector from detailed customs data on 130 categories of agricultural and food products, raw or processed. **The value of imports into Belgium from non-OECD countries represents only 9% of the value of total imports in 2019.**

However, several commodities from tropical countries (coffee, cocoa, palm oil, etc.) appear in customs data as partly coming from European countries, which is not physically possible. To compensate for the lack of traceability on the countries of origin of these products, the BASIC has developed a model allowing to concatenate for each sector:

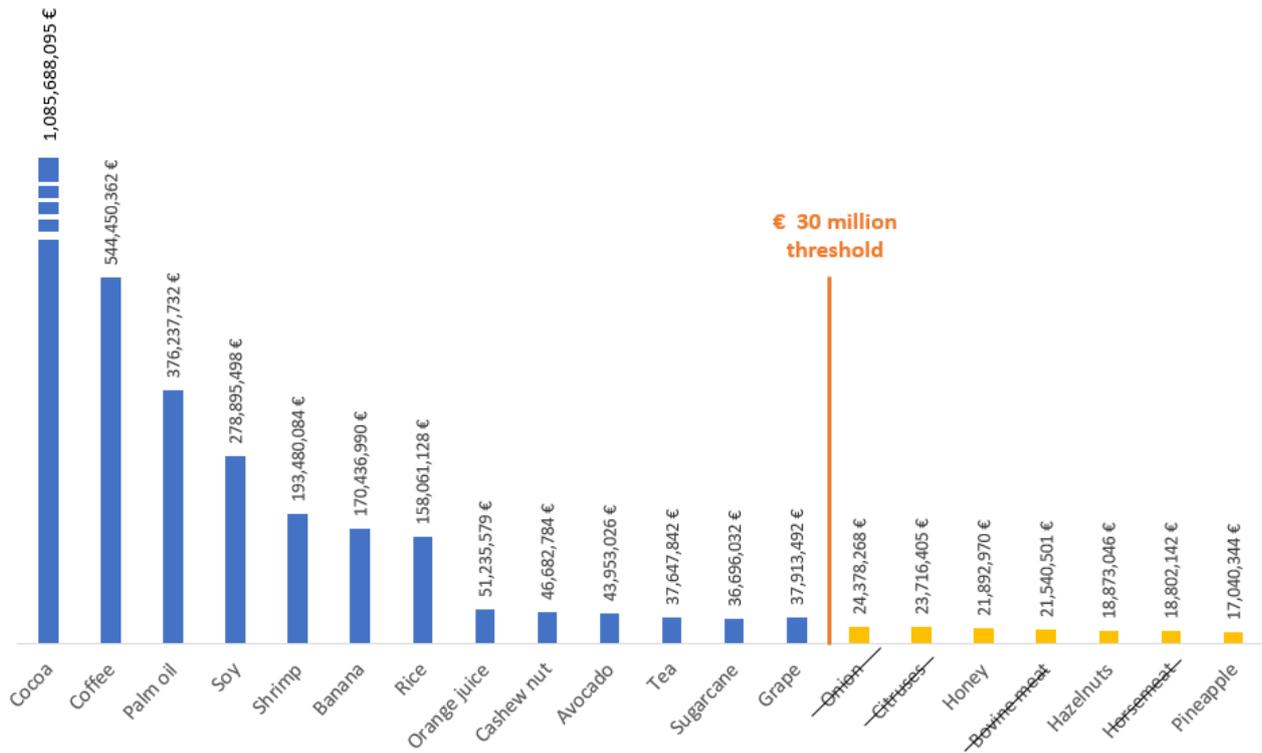
- direct imports from non-OECD countries to Belgium,
- and indirect imports from these same countries via the main European transit countries (mainly the Netherlands, France and Germany).⁵

Rather than a volume threshold, **a threshold of € 30 million in import value** over the year studied was then adopted, in order to select the main sectors to be included in the rest of the analysis (this set covering 90% imports from non-OECD countries). In addition, the hazelnut, pineapple and honey sectors have been added even if their value is slightly lower than this threshold, because they mainly come from non-OECD countries (unlike the onion, citrus fruits, beef and horsemeat sectors which do not, and were therefore not retained).

⁴ The database selected is Comtrade: the reasons for selecting this database as well as the methodology followed are explained in the Project Research Report.

⁵ Conversely, we have chosen the Comtrade database which uses the national concept methodology, which outsources quasi-transit or re-export data, i.e. goods imported by European companies through the port of Antwerp, without any value creation in Belgium.

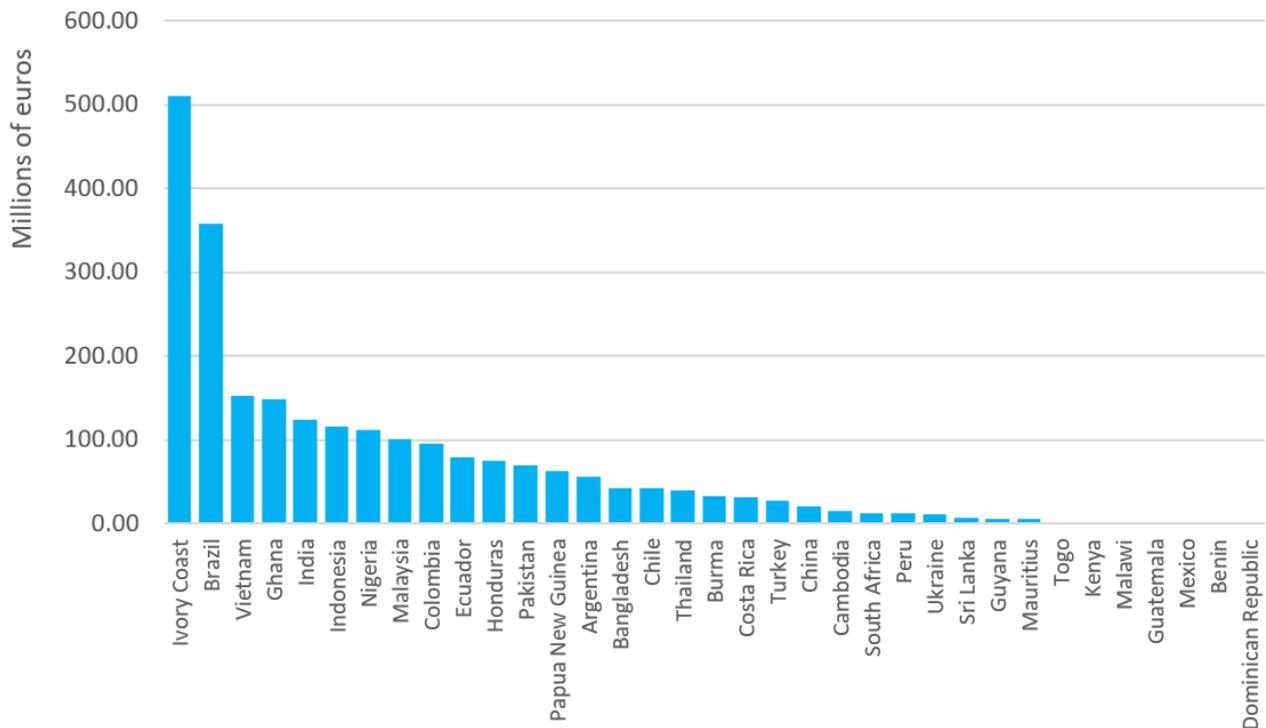
Figure 1: Main agri-food import value chains from non-OECD countries to Belgium (2019)



Source: BASIC calculations with data from Comtrade (2019)

Of the 16 value chains selected, the project analysed direct or indirect imports from 35 main non-OECD countries (see below the list in descending order of total imported value).

Figure 2: Main importing countries of the 16 international agri-food value chains, in value (2019)



Source: BASIC calculations with data from Comtrade (2019)

Beyond that, it should be noted that it was **not possible to identify the countries of origin for 20 categories of processed products** (chocolate products, confectionery, fruit and vegetable mixtures, fish preparations), because these the latter are made from mixtures of semi-finished ingredients that are impossible to trace in statistics. Together, these products represent a total value of € 3 billion in 2019.

Strong impacts on sustainability, and drivers that are structurally common to the different value chains

In order to analyse the social and environmental impacts of the 16 selected agri-food value chains, BASIC used a food sustainability analysis compass which takes the form of a "donut" and which is inspired by the work of the British economist Kate Raworth.⁶

Environmental capital is represented in green and constitutes the "ceiling" that must not be exceeded in order to preserve ecosystems and life on earth.⁷ Social capital, in blue, represents a "floor" of social justice that embodies the socio-economic minima derived from human rights and the essential needs attached to each person (and each living being) to ensure their development.

The analysis of the social and environmental impacts of the 16 agri-food value chains selected is detailed in the research report. We have endeavoured to highlight the root causes of the (mostly deleterious) impacts observed on society and the environment, based on a broad bibliographical review of publicly available academic and institutional reports.⁸

At the end of the analysis, two main families of value chains stand out because they share the same causes of the problems and very similar impacts:

- value chains with a majority of family farmers,
- value chains with a majority of plantation workers.

Case of supply chains with a majority of family farmers

The main import products in Belgium which are mostly grown by family farmers, on small plots, are cocoa, coffee, rice, cashew nuts, hazelnuts and honey. In addition, a minority but substantial share of the world's production of orange juice, palm oil, tea, cane sugar, bananas and soya are also produced by family farmers who often serve as an adjustment variable for traders and processors.

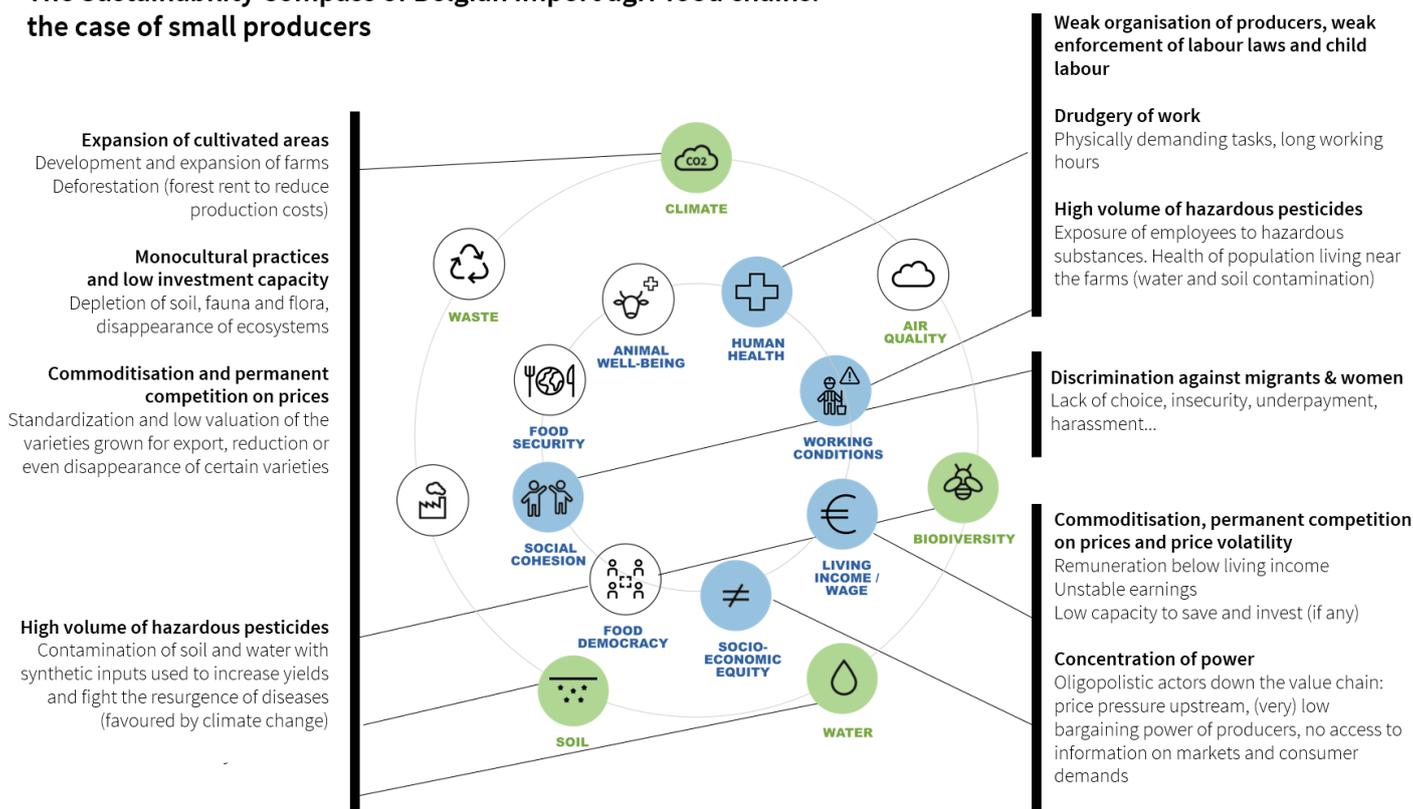
⁶K. Raworth, Donut Economics. Seven Ways to Think Like a 21st-Century Economist, 2017

⁷ Rockström, Johan, Will Steffen, Kevin Noone, Åsa Persson, F. Stuart Chapin, Eric F. Lambin, Timothy M. Lenton, et al. "A Safe Operating Space for Humanity". *Nature* 461, no. 7263 (2009): 472 -75. <https://doi.org/10.1038/461472a>; Steffen, W., Richardson, K., Rockström, J., Cornell, SE, Fetzer, I., Bennett, EM, Biggs, R., Carpenter, SR, de Vries, W., de Wit, CA, Folke, C., Gerten, D., Heinke, J., Mace, GM, Persson, LM, Ramanathan, V., Reyers, B. & Sörlin, S. *Planetary boundaries: Guiding human development on a changing planet. Science*, 2015

⁸ All of the impact paths that link the impacts observed in the compass to the root causes are explained and justified by a literature review with more than 400 academic references, in a tool developed by BASIC at the following link: <https://kumu.io/BASIC/food-unsustainability-grid#untitled-map>.

Figure 3: Sustainability compass of Belgian import agri-food value chains: the case of small producers

The Sustainability Compass of Belgian import agri-food chains: the case of small producers



Source: BASIC, 2022

Main environmental impacts

Over the last few decades, the strong growth in consumer demand for these different products has generated an uninterrupted increase in the agricultural area needed to cultivate them on a global scale. This extension of surfaces has been combined with ever stronger standardisation requirements enacted by international trade players who weigh on agricultural production, limit the number of varieties cultivated, and create competition between the multitude of farmers who produce them, the vast majority of them being perceived as interchangeable. Creating a context of constant pressure on prices and high volatility of these raw materials, producers are pushed to find solutions to reduce their production costs and maximise their yields.

For some products, cost reduction is achieved by taking from the forest to benefit from the richness of recently deforested soils (as is the case, for example, with cocoa, palm oil, soy, and coffee), resulting in significant loss of natural habitats and the animal and plant species that live there. More generally, monocultural practices and the use of chemical inputs tend to become widespread for most of these productions, generating a vicious circle of soil impoverishment and degradation of biodiversity. Some of them are also water-intensive (especially for rice, sugarcane and soya) and generate effluents (especially for palm oil and coffee), which cause significant pressure on the water resources in producing countries.

Main socio-economic impacts

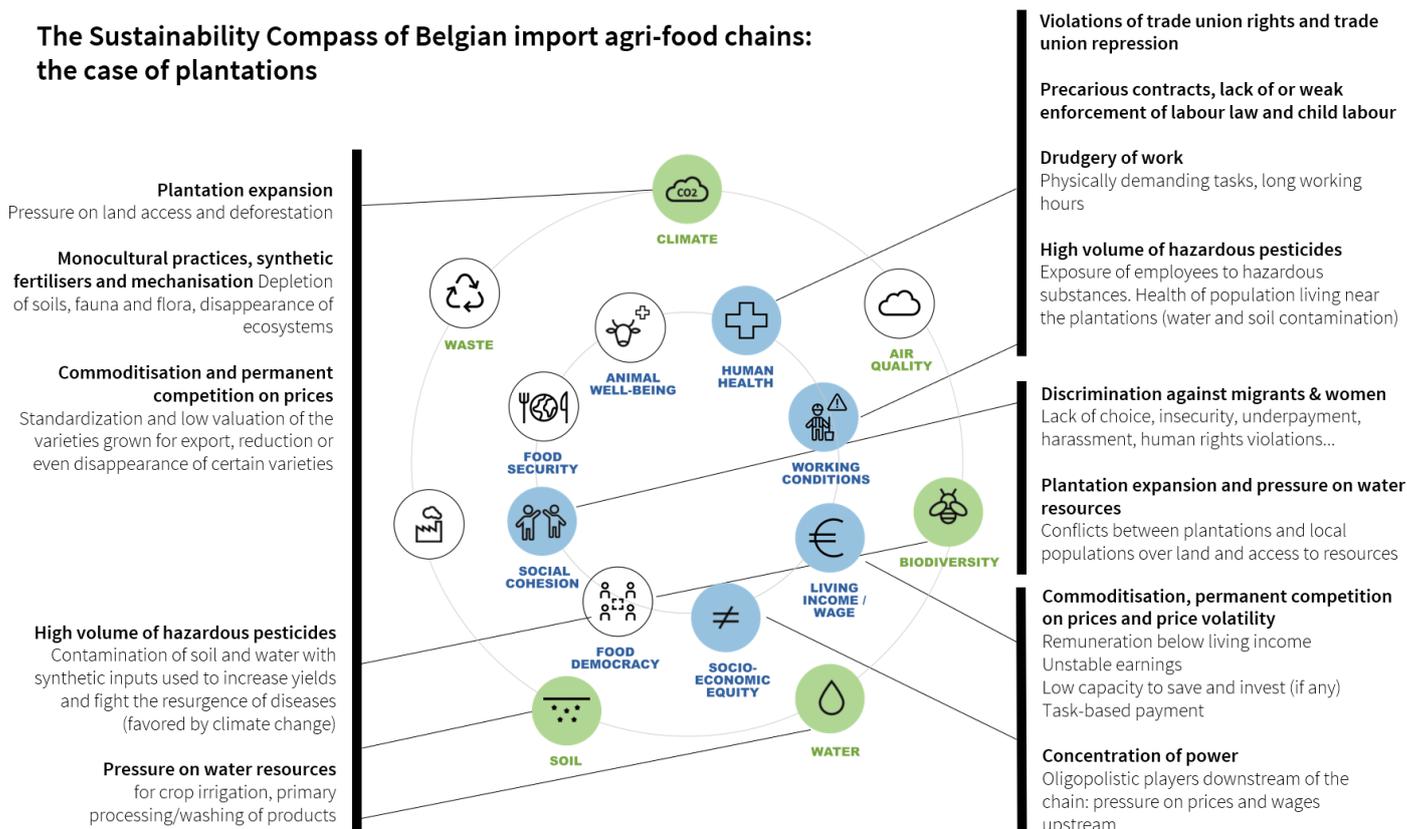
The work of family farmers on the different products studied is generally characterised by high hardship (physically hard tasks, long working hours) and exposure to dangerous pesticides used to increase yields and protect plants, several of which are banned in Europe (notably for palm oil, soya, banana, tea and sugarcane). These toxic substances primarily deteriorate the health of farmers, but also that of seasonal workers and, more

broadly, neighbouring populations living close to farms. These problems are amplified for migrants and women who are often discriminated against: because of their gender or their origins, they are confined to the hardest tasks, are structurally less paid and have increased difficulties in accessing land ownership and financial services. The situation of illegal migrants in a country can lead to serious abuses (case of Syrian migrants in Turkey in the hazelnut value chain), and sometimes violent social conflicts can arise regularly against a backdrop of poverty and ethnic tensions (case of Malian migrants and Burkinabe for cocoa in Côte d'Ivoire).

In economic terms, the family farmers of the various products studied are for the most part “price takers” with a (very) weak bargaining power vis-à-vis the small number of players who buy their products, especially since they are rarely organised collectively (whether in the form of cooperatives, associations...). Their selling prices are generally too low to allow them to achieve a decent income (living income). Combined with high price volatility (including for publicly traded products such as coffee, cocoa), their incomes are too low and unstable to allow producers to cover their production costs and invest in maintenance and /or the modernisation of their farms. These too low and fluctuating incomes also largely explain the use of child labour (coffee, cocoa, rice, cashew nuts and hazelnuts), even forced labour (coffee, cocoa). In some cases, the financial insecurity of producers can be coupled with an additional problem of food insecurity when production intended for export (“cash crop”) is favoured to the detriment of subsistence farming.

Case of supply chains with a majority of plantations

Figure 4: Sustainability Compass in Belgian import agri-food value chains: the case of plantations



Source: BASIC, 2022

The root causes of socio-environmental impacts documented in the abovementioned case of family farmers are found in a very similar way in the case of value chains where plantations predominate. They are amplified by (much) larger-scale models of agricultural production and by the greater asymmetry of power between landowners and the workers they employ. The main products concerned in the context of this study are bananas, pineapples, grapes (fresh), avocado, orange juice, tea, sugarcane, palm oil, soya, and to a lesser extent coffee and cashew nuts (plantations being a minority for these last two products).

Main environmental impacts

As in the case of products grown by family farmers, it is the ever-increasing consumer demand on an international scale that has accelerated the development of large-scale monoculture-based agricultural production. This mode of production generates an impoverishment of soils, ecosystems, and the diversity of cultivated species. The growth in cultivation areas associated with this agricultural production is also the cause of direct and indirect deforestation, in particular in the case of palm oil, soya and sugarcane.

To meet the requirements of international trade, plantations often choose to exploit an almost exclusive and (very) standardised variety, in particular for bananas, pineapples, avocados, palm oil, soya, tea, and orange. This feeds the substitutability of these producers, their constant competition, and the incessant pressure on prices and price volatility. This economic pressure in turn pushes the plantations to seek ever higher yields and feeds their “confinement” in monocultural practices. The small number of varieties grown for export increases their vulnerability to diseases and pests which are also favoured by climate change. This generates a high use of chemical inputs (some of which are banned in Europe) which contaminate the soil and water, which are the cause of deleterious or even lethal effects on ecosystems.

An additional problem is the large-scale continuous irrigation developed by some of these plantations (particularly in the cases of grapes, sugarcane, and avocado) and the water used in the fruit washing stations (in the case of bananas). This creates strong pressure on water resources, in direct competition with the needs of local populations and ecosystems that depend on them.

Main socio-economic impacts

Whether in plantations held by independent owners or in plantations that are vertically integrated into large global companies, international institutions have observed significant and frequent violations of labour and trade union rights, coupled with a strong precariousness of statutes and contracts, amplified in cases where the use of labour is outsourced to temporary work agencies (notably in the cases of grapes and sugarcane). Some plantations also sometimes use child labour (case of palm oil, bananas, tea) or even forced labour (palm oil, sugarcane, tea). At the root of these problems is the constant pressure on prices exerted by the world market, which is passed on by the owners of the plantations to their employees, who for the most part receive remuneration below the living wage, especially since they are frequently paid by the task (i.e. according to the volume of fruit harvested) and that their low level of organisation and unionisation most often puts them in a very weak negotiating position vis-à-vis their employer.

Plantation employees perform heavy work: physically hard tasks, long working hours, pressure on the harvest which is conducted in a “just-in-time” manner. In addition to these harsh working conditions, the employees are highly exposed to dangerous pesticides which they handle. Some pesticides are even sprayed by plane on the plots while workers are on-site (for example in banana plantations). These substances, which are used to increase yields and protect plants, have significant short- and long-term negative consequences on the health of employees, but also on that of neighbouring populations, especially since some of them they are banned in Europe because of their toxicity (notably those used on palm oil, soya, banana, tea and sugarcane).

Beyond these elements, the research report contains a fact sheet describing the very specific social and environmental impacts of the shrimp value chain, resulting from aquaculture and fishing. As for honey, it is very dependent on biodiversity and generates (very) low socio-environmental impacts compared to the other value chains studied.

Very few quantified impacts, especially in the social dimension

Our research on the 16 agri-food value chains selected revealed the difficulty of finding quantified indicators allowing us to compare the sectors in order to prioritise them.

The lack of data was particularly pronounced in the social field. Only 2 elements out of the 8 components of the BASIC sustainability compass could be documented by quantified indicators that are transversal to the different value chains:

- **Child labour and forced labour**, drawing on the US government list of products of child labour and forced labour published in 2022,⁹ which reports significant risks for the cocoa, coffee, palm oil, tea, cane sugar, rice, shrimp and soya;¹⁰
- **The estimation of the differential between the actual remuneration of farmers or workers and the decent income/decent wage** they should receive, based on the growing work that follows the “Anker” reference methodology¹¹ and which is financed by international development aid.

Regarding environmental impacts, indicators were found for a majority of BASIC compass themes:

- **the climate**, based on greenhouse gas emissions published in the “Agribalyse” reference database of the French Agency for Ecological Transition (Ademe), which consolidates the main results of life cycle analyses available to date on food products;¹²
- **the erosion of biodiversity**, measured through the annual average deforestation, direct and indirect, which was published in 2019 by Pendril *et al.* in the journal *Environmental Research Letters*;¹³
- **water consumption and water pollution**, which are measured via the water footprint concept (blue and grey water) developed by A. Hoekstra *et al.* and whose results have notably been disseminated by UNESCO (Institute for Water Education).¹⁴

The main results of this collection of numerical indicators, first at world level and then for the 5 main countries of origin linked to Belgian imports, are detailed on the following page. It should be noted that the impacts described here relate to production and the first stages of processing in the countries of origin. On the other hand, we were not able to quantitatively document the impacts on the rest of the value chain (transport, processing, packaging, etc.). The quantified estimation of these impacts of our consumption patterns throughout the value chain, from producer to consumer, therefore appears to be a public research issue at European level. More generally, there is a need to fill the lack of quantitative data to characterise the seriousness of the social and environmental impacts of the agri-food value chains studied, in order to enable decision-makers to build relevant public policies and to assess their impact over time.

⁹ The US legal obligation to draw up this list of sectors and countries at risk is available at the following link, with the most recent information for 2022: https://www.dol.gov/sites/dolgov/files/ILAB/child_labour_reports/tda2021/2022-TVPR-List-of-Goods-v3.pdf

¹⁰ See also the impact analyses for each of these sectors in BASIC, FTAO, University of Antwerp, The sustainability of agri-food imported in Belgium: How can Belgian authorities pave the way towards more sustainable global agri-food supply chains?, 2023.

¹¹ This indicator is further described in the research report. A large part of the agri-food value chains used to construct this indicator are notably compiled by the Global Living Wage Coalition: <https://www.isealalliance.org/about-iseal/our-work/global-living-wage-coalition>.

¹² <https://agribalyse.ademe.fr>

¹³ Florence Pendrill *et al.* Deforestation risk embodied in production and consumption of agricultural and forestry commodities 2005-2017, 2019

¹⁴ Hoekstra, AY *et al.* The water footprint assessment manual: Setting the global standard, Earthscan, London, UK, 2011.

Table 1: Numerical indicators of the social impacts of the 16 main global agri-food value chains imported into Belgium

Impact Problem/theme Indicator	Socio-Economic				
	Working conditions Child labour		Working conditions Forced labour		Decent standard of living Living Income/Wage
Definition	Child labour (according to the ILO): the child is between 7-11 years old and economically active; between 12-14 and working more than 14h/week; between 14-17 years old involved in the "worst forms of work" (slavery, prostitution, pornography, drug trafficking, deplorable conditions etc.).		Any work performed by a person under threat of a penalty for which the person does not work voluntarily.		The standard remuneration received for weekly work allowing a decent standard of living for that person and his family.
Source	US Department of Labor		US Department of Labor		Global Living Wage Coalition BASIC studies
Unit of measurement	No. of countries affected by child labour	Total Belgian import result	No. of countries affected by forced labour	Total Belgian imports result	Ratio between current income/wage and living income/wage
Cocoa	7	3	2	2	53%
Coffee	17	3	2	1	49%
Palm oil	3	2	2	2	81%
Soya	NA	NA	NA	NA	43%
Shrimp	3	1	2	0	80%
Bananas	5	1	0	0	89%
Rice	12	1	3	0	49%
Orange juice	NA	NA	NA	NA	56%
Cashew nut	3	2	0	0	N/A
Avocado	NA	NA	NA	NA	91%
Tea	6	2	1	1	44%
Sugarcane	19	4	5	1	36%
Grape	2	0	0	0	53%
Honey	NA	NA	NA	NA	N/A
Pineapple	1	1	0	0	74%
Hazelnut	1	1	0	0	51%

Source: BASIC calculations on the basis of above-mentioned sources, in line with the principal import countries for Belgium in the UN Comtrade database (2019)

Table 2: Numerical indicators of the environmental impacts of the 16 main global agri-food value chains imported into Belgium

Impact	Environmental							
	Climate		Biodiversity		Water resources		Water resources	
Problem/theme	GHG emissions		Deforestation		“Grey” water		“Blue” water	
Indicator	GHG emissions		Deforestation		“Grey” water		“Blue” water	
Definition	Corresponds to the modification of the climate, affecting the global ecosystem. The indicator refers to the increase in global temperature due to greenhouse gas emissions linked to the product's life cycle analysis (LCA).		Number of hectares of direct and indirect deforestation generated each year by each agricultural commodity between 2005 and 2017		Volume of fresh water needed to dilute to an acceptable level the pollution generated by discharges from the various production processes		The amount of surface and groundwater consumed (evaporated) resulting from the production of a product.	
Source	Aaribalyse		Pendrill et al. (2020).		Water Footprint - UNESCO Institute for Water Education		Water Footprint - UNESCO Institute for Water Education	
Unit of measurement	kg CO ₂ eq/kg of product	Total Belgian imports	hectares / year	Total Belgian imports result	m ³ / tonne	Total Belgian imports result	m ³ / tonne	Total Belgian imports result
Cocoa	17,11	3 986 539 165 666	732 498	280 297	179	41 721 740 480	4	932 329 396
Coffee	9,4	1 139 498 051 501	503 321	230 284	532	64 490 740 787	116	14 061 890 848
Palm oil	5,59	2 690 977 153 192	5 479 420	5 290 759	40	19 255 650 470	0	0
Soya	3,89	3 152 389 958 912	5 012 100	3 790 996	37	29 984 171 846	70	56 726 811 600
Shrimp	7,06	161 781 727 056	NA		NA	NA	NA	NA
Bananas	1,87	225 822 243 289	198 185	18 053	33	3 985 098 411	97	11 713 774 117
Rice	2,16	587 739 585 765	2 867 565	244 156	187	50 883 010 434	341	92 786 666 086
Orange juice	0,9	64 167 208 225	69 243	21 600	90	6 416 720 823	199	14 188 082 708
Cashew nut	8,45	41 109 712 239	334 906	61 663	444	2 160 084 288	921	4 480 715 381
Avocado	2,75	39 577 790 296	40 616	9 185	849	12 218 743 259	283	4 072 914 420
Tea	0,05	282 079 627	39 301	11 168	726	4 095 796 178	898	5 066 150 094
Sugarcane	1,15	126 337 801 743	470 103	189 952	104	11 425 331 636	455	49 985 825 907
Grape	0,63	11 232 777 152	13 020	1 553	87	1 551 193 035	97	1 729 491 085
Honey	1,15	13 774 594 200	NA		NA	NA	NA	NA
Pineapple	1,15	12 250 724 515	59 354	15 919	31	330 236 922	9	95 875 235
Hazelnut	4,51	10 943 591 463	1 443	1 275	354	2 644 903 480	1090	858 987 002

Source: BASIC calculations on the basis of above-mentioned sources, in line with the principal import countries for Belgium in the UN Comtrade database (2019)

The sustainability risk score of the selected agri-food value chains

Based on the previous analyses, we developed a sustainability score for each of the 16 main agri-food product chains imported into Belgium, relying first on the analysis of the social and environmental impacts, then on the quantified indicators whose key results were presented above. The chains were scored according to the following principles:

- a **3-level gradient** (from least negative 1 to most negative 3) was developed to measure the severity of impacts on 8 BASIC compass themes (information collected on air quality, waste management and food democracy being insufficient to be integrated);
- **the rating of each value chain commodity according to this gradient** was carried out based on the results of the qualitative analysis illustrated via the BASIC compass, supplemented by the quantified indicators common to the value chain, when these were available (see table below).

The combined use of qualitative and quantitative analysis thus made it possible to fill in the gaps identified during the collection of quantified indicators, in particular for social issues. The sustainability risk score obtained only concerns the main countries of origin for each value chain studied (note that the total points may vary from one value chain to another depending on the themes that concern them).

Table 3: Methodology for rating the social and environmental impacts of the value chains

Rating	1	2	3
Climate	Emissions > 0	Emissions > 0.1 billion t	Emissions > 1 billion t
Biodiversity	Exposure of species to hazardous substances	Exposure of species AND destruction of habitats	Exposure of species AND destruction of habitats AND deforestation > 1 Mn Ha
Water	Overconsumption OR contamination	Overconsumption AND contamination	Overconsumption and contamination AND water footprint > 40 billion m ³
Soils	Pollution OR soil depletion	Pollution AND soil depletion	
Health	Worker health damage	Health damage to workers AND local populations	Health damage to workers AND local populations AND significant number of deaths
Labour law	Hardship OR child/forced labour OR repression	Hardship AND child/forced labour OR repression	Hardship AND child/forced labour AND repression
Decent income	Income between 75% and 100% of the living wage / living income	Income between 50% and 75% living wage /living income	Income below 50% living wage /living income
Social cohesion	Tensions between groups of actors	Conflicts between groups of actors	Modern slavery

Source: The whole methodology is explained in BASIC, FTAO, University of Antwerp, "The sustainability of agri-food imported in Belgium: How can Belgian authorities pave the way towards more sustainable global agri-food supply chains?", 2023.

In the end, 10 agri-food import value chains stand out, recording an impact score greater than or equal to 15 (see table on next page). The description of the different impacts underlying the rating can be found in the research report, which contains for each of the 16 value chains:

- A sheet describing the main social and environmental impacts, as well as their root causes, in relation to the main importing countries in Belgium;
- The aggregated numerical indicators for each value chain and its main importing countries.

Table 4: Sustainability risk score of the 16 international agri-food value chains imported into Belgium

Item	Climate	Air quality	Biodiversity	Water	Soils	Energy Resources / materials	Waste	Human health	Labour law	Decent income	Social justice	Food democracy	Social cohesion	Food security	Animal welfare	SCORE	TOTAL
Coffee	3		2	3	2	1		2	3	3	2		2	1	N/A	24	/26
Soy	3		3	3	2	1		1	2	3	2		2	1	N/A	23	/26
Cane sugar	2		2	3	2	1		1	3	3	2		1	1	N/A	21	/26
Palm oil	3		3	2	2	N/A		2	3	1	2		1	1	N/A	20	/25
Shrimp	2		2	2	N/A	N/A		3	3	1	2		3	1	1	20	/24
Tea	1		1	1	2	1		2	3	3	2		3	N/A	N/A	19	/25
Cocoa	3		2	3	1	N/A		1	2	2	2		2	1	N/A	19	/24
Rice	2		2	3	2	N/A		2	1	3	2		1	N/A	N/A	18	/25
Orange juice	1		1	2	2	1		2	2	2	2		1	N/A	N/A	16	/25
Grape	1		1	1	2	1		1	2	2	2		2	1	N/A	16	/26
Bananas	2		1	2	2	N/A		2	2	1	2		1	N/A	N/A	15	/24
Pineapple	1		1	1	2	N/A		1	2	2	2		1	N/A	N/A	13	/24
Attorney	1		1	1	N/A	N/A		1	2	1	2		1	N/A	N/A	10	/22
Hazelnut	N/A		N/A	1	N/A	N/A		1	2	2	2		1	N/A	N/A	9	/16
Cashew nut	1		N/A	1	N/A	N/A		1	1	1	2		1	N/A	N/A	8	/19
Honey																0	/0

Levers to reduce the footprint of food in Belgium

In the third phase of the mission, an inventory of the relevant legislative and voluntary initiatives was carried out, in order to provide guidance to the Belgian authorities for a sustainable transition of the agricultural and food sectors.

What lessons can be learned after 20 years of multi-stakeholder initiatives in international agri-food value chains?

Recent years have seen a proliferation of voluntary initiatives taking a 'chain' or issue-based approach to food governance, mostly responding to growing pressure from consumers and civil society organisations. In the name of dialogue and collaboration, these hybrid forms of governance are mainly characterised by the voluntary character of participation, the absence or non-binding nature of their enforcement mechanisms, and the emphasis placed on inciting positive practices and virtuous behaviours, rather than on the punishment of non-respect of the commitments made.

Within the framework of this project, a dozen multi-stakeholder initiatives (MSIs) have been analysed to assess their impact, limits, and possibilities for improvement. The entire methodology and description of the initiatives analysed can be found in the full research report. The evaluation process was structured around a series of *ad hoc* interviews with experts from the value chains concerned and members of these multi-stakeholder initiatives. To this was added a review of the existing academic and non-academic literature, as well as the study of the standards of the initiatives, making it possible to obtain additional data on the effectiveness of the instruments and their capacity for transformation.

Not all voluntary initiatives are the same. In some cases, MSIs are created due to the intervention of a public authority, which retains varying degrees of influence on the processes of the initiative. In other circumstances, the initiatives are designed as global platforms for coordination between stakeholders, while in other cases the multi-stakeholder initiative is also associated with a label or certification that reflects the adoption of the criteria and standards within the label/certification. Some initiatives may also issue standards and certifications (e.g., RSPO, Bonsucro), others may agree to adopt existing private standards (e.g., Beyond Chocolate), and yet others may focus solely on the initiative and coordination (e.g., World Banana Forum). In the light of the existing literature on multi-stakeholder initiatives, we also considered private initiatives that do not function as multi-stakeholder platforms, but which involve actors from different sectors in defining a standard and then promote its application all along the chain, as a form of private governance (e.g., Rainforest Alliance and Fairtrade International).

Given the importance that the chocolate sector played in the decision to launch the "Beyond Food" initiative, the initial phase of our research focused on existing voluntary initiatives in this field. In this context, a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) of the Initiatives for Sustainable Cocoa ("ISCOs," for *Initiatives for Sustainable Cocoa*), which are among the most successful forms of multi-stakeholder spaces, was carried out based on feedback from the players involved in the Belgian, French and German initiatives. The mixed result highlights some of the main strengths of this type of dialogue platform in the pre-competitive space, but also the limits of capacity for large-scale action in the absence of cross-cutting appropriation of sustainability goals within companies, or in the absence of a supportive regulatory and policy environment.

Table 5: Strengths, weaknesses, opportunities, and threats of sustainable cocoa initiatives

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ➤ Unique platform in the pre-competitive space to engage in constructive and transparent dialogue and seek consensus beyond differences ➤ Common understanding of key sustainability issues in the supply chain ➤ Common floor of commitments while leaving the door open to higher individual commitments. ➤ Foster trust, knowledge exchange, peer learning and support members in achieving their commitments. ➤ Representation of the diversity of actors within the same supply chain ➤ Financing schemes for pilot projects, useful for gaining a better or new understanding of structural and/or emerging challenges in producing countries, testing high-impact models ➤ Co-financing structure allows partners to implement more innovative and riskier projects ➤ Helps save on analytics and learning, allowing resources to be directed to original investments rather than redundant metrics 	<ul style="list-style-type: none"> ➤ Adoption and implementation of heterogeneous commitments ➤ Partial market coverage - inhibits action ("first mover disadvantage") ➤ Lack of large-scale impact ➤ Absence of individual responsibility ➤ Neglected economic dimension ➤ Lack of efficiency in the absence of a favourable regulatory and policy environment ➤ Power dynamics, how value and margins are distributed are insufficiently taken into account ➤ Absence of producer countries and producer representatives ➤ Non-transparent data collection and aggregation ➤ Restricted relationship between donor and recipient with governments - lack of common long-term vision ➤ Lack of transversal appropriation of objectives by companies ➤ Absence of entry/membership criteria to assess stakeholder willingness to drive effective change. 	<ul style="list-style-type: none"> ➤ Collective leverage for complementary action to future EU legislation (e.g., CSDDD, deforestation) ➤ Possibility of bringing to the debate a specific approach to a value chain and its challenges - useful contribution to the implementation of future European regulations ➤ Opportunity to strengthen the involvement of local civil society who can question the sustainability results of companies ➤ Foster a change in market dynamics ➤ Provide the appropriate framework for discussing and determining the key features that would allow members to integrate living income into their business practices, without creating a competitive disadvantage. ➤ Stimulate a collective upwards effort thanks to the leadership of the most ambitious companies ➤ Strategic benefits arising from the involvement of stakeholders active in different value chains—beyond the traditional focus on individual value chains. ➤ Opportunity to use lessons learned from ISCOs to initiate effective change in other value chains. ➤ Strengthening of sectoral and inter-ISCO coordination systems 	<ul style="list-style-type: none"> ➤ Used as substitutes for the need for strong regulatory frameworks ➤ Perception of risk related to compliance with competition law ➤ Silo approach to environmental and social objectives ➤ Different levels of ambition and commitment that can encourage alignment to the lowest common denominator ➤ Different calculation and reporting frameworks and methodologies ➤ The absence of an accountability system can lead to "greenwashing/fairwashing" and the continuation of the status quo ➤ Companies carrying out ambitious pilot projects within the framework of the ISCOs continue in parallel to buy the largest part of their volume at a price which neither ensures a subsistence income for the producers nor gives them the means to invest in more sustainable production ➤ Volatility of national political support - lack of long-term vision and commitment

Although most of the initiatives aim to coordinate the various links of an international agri-food value chain and its great diversity of actors (civil society organisations, traders, manufacturers, brands, and distribution),¹⁵ we note the absence of representatives of producers or countries of production in the majority of these platforms. Similarly, certain subjects do not seem to be sufficiently considered to date, either within the ISCOs or in the other multi-actor spaces analysed, such as the redistribution of resources and value towards the production link in the chain, which nevertheless constitutes one of the keystones in solving multiple sustainability challenges (such as child labour, deforestation, etc.). Multi-stakeholder governance initiatives in international agri-food value chains often overlook market power, bargaining power, and existing inequalities within value chains.

As part of our analysis, a scoring grid was put in place to highlight the potential ability of different multi-stakeholder initiatives to influence the root causes of social and environmental impacts in value chains - if all its requirements and procedures were met to the highest level of compliance. As such, the report considers both the potential impact and the actual impact of each initiative. The score ranges from 0 to 3, indicating that the instrument does not take into account the problem (0) or that on the contrary, the instrument is able to generate a significant impact on the root cause, such that no legislative intervention is necessary (3). The analyses show that none of the multi-stakeholder initiatives has the capacity to have sufficient impact on its own. Multi-stakeholder initiatives require the *ex ante* implementation of public measures that introduce mandatory sustainability requirements, alongside adequate penalties for non-compliance.

¹⁵ In some rare cases, financial institutions have also been involved (Beyond Chocolate in Belgium and World Banana Foundation).

Table 6: Leverage of multi-stakeholder initiatives on the root causes of the socio-environmental impacts of the 16 selected agri-food value chains

Voluntary initiative	Expansion of agri. spaces (to detriment of forest)	Mono-crop models	Synthetic fertilisation	Mechanisation	Dangerous pesticides	Water consumption	Investment capacities (small producers)	Labour law violation	Precarious employment - Difficult work	Occupational health and safety	Discrimination	Commodification / Low prices	Price volatility	Concentration of power
Beyond Chocolate *	2	0	2	0	2	2	2	2	2	2	2	2	1	0
World Banana Forum	0	1	1	1	2	2	2	1	2	1	2	2	2	0
World Cocoa Foundation	1	0	0	0	1	0	1	1	0	0	0	0	0	0
Ethical Tea Partnership	1	0	1	0	1	1	1	1	1	1	1	0	0	0

Fairtrade International	2	0	2	0	2	2	2	2	2	2	2	2	1	0
Rainforest Alliance	2	0	2	0	2	2	1	2	2	2	2	1	1	0
Bonsucro	1	0	1	0	1	1	1	1	1	1	1	0	0	0
ASC shrimp	1	0	0	0	1	1	0	1	1	1	1	0	0	0

MSC & Chain of Custody	0	0	0	0	0	0	0	1	1	1	0	0	0	0
RSPO	2	0	1	0	1	2	2	1	1	1	2	0	0	0
RTRS	2	1	1	0	2	1	0	2	2	2	2	0	0	0

Voluntary initiatives scoring

0	No specific reference
1	Reference to the question is made in the text, but no specific objective is introduced
2	The problem is discussed, and specific objectives are identified
3	Specific objectives responding to the issue are determined & the verifiable positive impact is such that regulatory intervention is not necessary

** The authors acknowledge that the Beyond Chocolate initiative launched by the Belgian government contains a commitment by 2025 for all actors who are members of the initiative to exclusively use or market cocoa that meets the certification standards or cocoa obtained under corporate sustainability programs, that deforestation associated with cocoa production must be eliminated by 2030 and that by the same date all associated producers must earn at least a living income. It is therefore the highest potential of Beyond Chocolate that has been retained in the above scoring with the adoption of the highest standards among the existing certifications and compliance with the objectives. Aware that stakeholders can decide to adopt less demanding standards, without any legal responsibility for not doing so, the potential of Beyond Chocolate can be greatly undermined, unless public authorities play a leading role and provide for a binding legal framework on some dimensions.*

The standards set by the multi-stakeholder initiatives listed above cover most of the root causes of social and environmental impacts identified by the project (see Table 6). On the other hand, the causes relating to the development of monoculture production, mechanisation, concentration of power, commoditisation or even price volatility are hardly addressed by multi-stakeholder initiatives.

Beyond the spectrum of actors and subjects covered, the challenge of this report is also to assess the driving force of multi-stakeholder initiatives for niche value chains and conventional ones, within a value chain. Voluntary initiatives often mean that a (large) part of the market is not covered. In 2021, Beyond Chocolate brought together brands and distribution players that covered approximately 57% of the market in terms of volumes. The market proportions covered vary widely: for example, the Aquaculture Stewardship Council currently covers 2.8% of the global market for farmed shrimp, while the Roundtable on Sustainable Palm Oil currently certifies around 20% of palm oil produced in the world. This can be understood as having a potential for a ripple effect on the rest of the value chain; however, a niche can also be interpreted as an area of convergence and dialogue between private sector initiatives and public authorities. Initiatives coming from public authorities, such as the obligation to award public contracts for certified food (e.g., organic or fair trade), would contribute to stimulating the market share created by a specific multi-stakeholder initiative and thus to favouring a more structural transition for the rest of the value chain.

The effects of certification initiatives can even be counterproductive for producers, as when they pass on the costs of sustainability and the costs of certification to this link in the chain only, in a context of continuous competition. Opinions differ greatly on the role and real impact of these multi-stakeholder initiatives. In order to strengthen the capacity of these initiatives to transform the agri-food value chains concerned, several avenues are put forward in the research report, and taken up in the cross-cutting recommendations below.

While these multi-stakeholder initiatives have the potential to improve livelihoods in some ways and open spaces for better environmental practices, they do not alter the dynamics that contribute to dependency and the unequal distribution of value along the chain.

It is important to avoid falling into the trap of thinking that multi-stakeholder initiatives will be able to solve structural and pervasive problems in agricultural and food commodity chains. These cannot be resolved without adequate and constraining external supervision, in particular when the global market involves the interdependence of different levels of actors and territories and is characterised by high levels of opacity and non-accountability. For a transformative effect, some root causes will also need to be addressed transversally through the different value chain, within a regulatory framework, rather than in silos, chain by chain.

In conclusion, the presence of multiple multi-stakeholder initiatives in the agri-food value chains covered by our study certainly indicates a certain level of maturity in the pre-competitive spaces on food sustainability issues, but also highlights many limits that cannot be overcome from within. In this sense, strong regulatory frameworks, both at national and European level, appear as a prerequisite to fully unleash the potential of these voluntary interventions and address some of their main shortcomings, such as the lack of individual accountability mechanisms.

The need for binding public interventions as a prerequisite for a transition towards more sustainability

In order to inform the priorities of the transition, we have analysed in depth a set of existing or future legislative interventions, focusing on:

- Those that have the greatest potential to impact the selected agri-food supply chains
- Those for which the Belgian authorities have concrete levers at their disposal.

Among these levers, we particularly note the opportunity that the Belgian Presidency of the Council of the European Union will offer in 2024 to exert a decisive influence on the European political agenda and priorities.

In this context, the research report establishes a common framework of analysis making it possible, for each initiative selected, to determine:¹⁶

- The type of process and its tentative schedule
- The scope and its interaction with the list of selected supply chains
- The assessment of its potential impacts on sustainability, paying particular attention to the components of the sustainability compass and the possible links between social and environmental ambitions.

As a result, this allowed us to identify the existing levers for the Belgian authorities to help these initiatives reach their full potential. The report shows how political leadership and specific positions, both at national and European level, can help make a difference in a coherent and strategic approach towards sustainable food systems.

Legislative initiatives at European level

The European Union and its Member States are committed to supporting the global transition towards more sustainable food systems, in particular within the framework of the priorities defined by the Green Deal for Europe and the “Farm to Fork” and “Biodiversity” strategies.

Provided that they are designed and/or revised in an ambitious way, certain legislative interventions are able to remedy the structural weaknesses of voluntary spaces by introducing more equal conditions of competition, by guaranteeing homogeneous application of rules over time and space, and by establishing mechanisms of individual accountability, combined with effective sanction regimes.

The proliferation of legislative initiatives in recent years, many of which are intended to have a direct impact on the agri-food sector, should not, however, obscure the significant progress that remains to be made to ensure the transition from the current sub-optimal state, to a stage where these initiatives can fully support a paradigm shift on the environmental, economic and social levels.

Below is a summary overview of the scope and timetable of the European legislative initiatives analysed in the research report.

¹⁶ The description of the potential of each Belgian or European regulatory initiative can be found in BASIC, FTAO, University of Antwerp, The sustainability of agri-food imported in Belgium: How can Belgian authorities pave the way towards more sustainable global agri-food supply chains?, 2023.

Table 7. Scope and timeline of relevant European regulatory initiatives analysed

European regulations	Perimeter	Provisional calendar
EU Public procurement rules – New revision of the 2014 Directive and introduction of mandatory minimum criteria for food public procurement (Farm to Fork Strategy)	Universal: 16 agri-food value chains	Probable revision of the Directive during the next Commission (2024-2029) Introduction of mandatory minimum criteria initially planned for 2021 (F2F Strategy)
New EU Legislative Framework on Sustainable Food Systems (SFS)	Universal: 16 agri-food value chains	New framework expected to be presented in 2023
EU Corporate Sustainability Due Diligence Directive (CSDDD)	Universal: 16 agri-food value chains	Proposal for a Directive published by the EC in February 2022 – Adoption of the General Orientation of the Council in December 2022 Opening of dialogues in 2023
Revision of EU Directive on Unfair Trading Practices (UTPs) in business-to-business relationships within the agricultural and food supply chain	Universal: 16 agri-food value chains	Revision of the EU Directive by the Commission (2025) and revision of the national transposition in Belgium (2024)
Revision of the EU Horizontal Guidelines on competition law	Universal: 16 agri-food value chains	Publication of revised guidelines planned for 2023
EU Regulation on deforestation-free products	Cocoa, coffee, soy, palm oil	Provisional political agreement reached in December 2022 Opportunities offered by upcoming review processes
EU Regulation on prohibiting products made with forced labour on the Union market	Universal. The 2022 U.S. Child or Forced Labour Goods List ¹⁷ identifies pronounced risks for the following industries: cocoa, coffee, palm oil, tea, cane sugar, rice, shrimp, and soybeans. ¹⁸	European Commission proposal published on 14 September 2022 – currently in the hands of the co-legislators

In this sense, **the EU Corporate Sustainability Due Diligence Directive (CSDDD)** could play a driving role in the transition by addressing the negative impacts of business activities and their value chains on human rights and the environment. More importantly, the Directive should address the current shortcomings in corporate individual liability and provide victims with means to access justice. Its implementation can create greater

¹⁷ The US legal obligation to draw up this list of sectors and countries at risk is available at the following link, with the most recent information for 2022: https://www.dol.gov/sites/dolgov/files/ILAB/child_labour_reports/tda2021/2022-TVPR-List-of-Goods-v3.pdf

¹⁸ See also the impact analyses for each of these sectors in BASIC, FTAO, University of Antwerp, The sustainability of agri-food imported in Belgium: How can Belgian authorities pave the way towards more sustainable global agri-food supply chains? 2023.

transparency, allowing national public authorities and civil society watchdogs to better identify negative impacts and, ultimately, facilitate the dissemination of best practices in international agri-food value chains.

The impact of this directive will, however, largely depend on its final wording, its transposition, and its application within the Member States. While the members of the Council of the EU agreed on their negotiating position in December 2022, it leaves open many gaps which will have to be filled in the framework of the dialogues, among which the need to:

- Cover all internationally recognised human rights and environmental standards, including *living income* as a human right in its own right and a prerequisite for the realisation of other rights
- Include the climate in the scope of the due diligence obligations of companies
- Not to rely on codes of conduct, but on the contrary to require an evaluation and significant adaptation of companies' purchasing practices; require responsible disengagement as a last resort solution, in order to promote a long-term commitment between buyer and seller allowing them to work together towards greater sustainability.

The forthcoming EU regulation on deforestation-free products is an eloquent illustration of the need for political authorities to take into account all the variables and actors at stake, in order to meet the challenges of sustainability of food systems. The creation of dual trade dynamics risks diluting its effectiveness and causing counterproductive effects on both the protection of natural ecosystems and the various social components of the sustainability compass.

In this context, increasing the price paid to smallholders should be seen as the entry point to the required structural changes, allowing them to both break out of the vicious circle of poverty and invest in more sustainable and deforestation-free agricultural practices that are respectful of planetary constraints. Without the political will to correct this current blind spot of the Regulation, smallholders will often find themselves trapped in economic realities where expanding their land remains the only economically viable solution to secure their livelihoods. The moment seems particularly propitious for Belgium, together with its partners, to put pressure in favour of the effective implementation of a coherent and inclusive European framework strategy for partnerships with producer countries, which would help reverse the rather vertical approach that has been followed so far in the development and communication of the initiative to these countries. This is an essential step to regenerate confidence, greater acceptance, and define together the support needed to bring smallholders into compliance with these new requirements for access to the European market.

Finally, the deforestation component also provides a good example of the potential articulation of regulatory and voluntary spaces. While the multiple voluntary initiatives and "zero deforestation" commitments of the private sector have failed to achieve the expected results, underlining the need to adopt a more binding framework, the future Regulation could contribute to reversing this trend by catalysing the effective implementation of these commitments; by opening the door to the integration of reinforced objectives, aligned with the requirements of the legislation, both in the context of multi-stakeholder initiatives and of certifications; and by encouraging actors in multi-stakeholder spaces to define their added value (for example, useful contribution to any sectoral guidelines; transmission of information on compliance challenges; strengthening of collaboration between members to develop joint monitoring, databases; capitalisation of experiences, in order to optimise the implementation of the Regulation).

More recently, the European Commission has also moved forward with its **plan to ban from the EU market products made, extracted or harvested using forced labour**. The draft Regulation is currently in the hands of the co-legislators. Political leadership in the Council will therefore be needed to improve the current proposal towards a more ambitious scenario, so that the forthcoming legislation is not only seen as a tool to clean up the EU market, but that it becomes a powerful lever to reduce the rates of forced labour within supply chains, while ensuring that it does not produce negative effects on the people it seeks to protect.

Global agri-food value chains are particularly vulnerable to **unfair trading practices (UTPs)**, which hinder the ability of producers to cover the cost of sustainable production (from both a social and environmental point of view). Our analysis shows that while the 2019 EU directive overall acts as a catalyst for more sustainable food systems, some of its aspects make it less effective, including the low rate of complaints from farmers in partner countries, with the directive requiring a direct link with EU buyers which is not always demonstrable; the lack of accessibility to complaints platforms; and a non-dissuasive sanctions regime. In this regard, the Belgian authorities have significant opportunities to come, first in the context of the revision of the national transposition law by 2024, then in the context of the revision of the Directive at European level. The forthcoming evaluation could fill the gaps identified above and include in the Directive various good practices introduced by some Member States by tackling, for example, prices below production costs.

While the interventions mentioned above rely mainly on a push effect, for example by establishing mandatory criteria for access to the European market, others, on the other hand, rely on a pull effect capable of triggering more sustainable pathways.

This is the case of the **ongoing revision of the Horizontal Guidelines of European competition law**. Provided the review adopts a holistic definition of sustainability, putting on equal footing social and environmental considerations, it could in the future facilitate coordinated multi-stakeholder attempts towards more sustainability as well as the exploration of certain topics that are so-far “taboo” within voluntary MSIs (e.g., pricing issues). Beyond direct engagement with the Commission, national competition authorities are able to influence discussions around EU horizontal guidelines by drafting their own guidance documents and assessing co-operations and agreements with a view to greater flexibility vis-à-vis sustainable development goals.

Other interventions analysed have the ambition to combine the two types of effects, push and pull. This applies to the future **European framework for Sustainable Food Systems (SFS)**. The EU's "Farm to Fork" strategy foresees the development of a proposal for a horizontal legislative framework on sustainable food systems, based on an integrated systemic approach which is currently lacking. This proposal should include both provisions aimed at establishing minimum requirements for food products, as well as provisions to encourage different players to go beyond this level. The potential of this intervention seems still largely unexplored to this day – particularly with regard to the future dialogue between the European framework and possible national plans in favour of sustainable food.

On the basis of the analysis carried out, the details of which and all of the recommendations intervention by intervention can be consulted in the research report, a summary evaluation grid has been put in place. The grid rates initiatives according to their potential to influence the various root causes of social and environmental impacts, assigning a:

- 0- when the intervention does not contain a specific reference and no indirect impact is foreseen;
- 1- when the analysis has detected a potential impact but no specific objective is or cannot a priori be introduced;
- 2- when the analysis has identified potential for the instrument to incorporate specific targets that would positively impact the root cause;
- 3- when the root cause in question is a central objective of the intervention.

Table 8: Scoring of the ability of European legislation to act on the root causes of social and environmental issues in global agri-food value chains

European legislation	Expansion of agri. spaces (to detriment of forest)	Mono-crop models	Synthetic fertilisation	Mechanisation	Dangerous pesticides	Water consumption	Investment capacities (small producers)	Labour law violation	Precarious employment - Difficult work	Occupational health and safety	Discrimination	Commodification / Low prices	Price volatility	Concentration of power	TOTAL of 42
Sustainable public procurement (introduction of EU minimum criteria/Green Public Procurement)	2	2	2	2	2	2	2	2	2	2	2	2	2	0	26
Forthcoming legislative EU framework on sustainable food systems	2	2	2	0	2	1	2	1	2	1	0	1	2	0	18
Corporate Sustainability Due Diligence Directive (CSDDD)	1	0	2	0	2	1	2	2	1	2	2	1	1	0	17
EU Directive on Unfair Trading Practices in agri-food supply chains and its upcoming Revision	0	0	1	0	1	0	2	2	2	0	1	2	0	2	14
EU Competition law - Revision of the Horizontal Guidelines	1	1	1	1	1	1	1	1	1	1	1	1	1	1	14
EU Regulation on deforestation-free products	3	1	0	0	0	1	2	1	0	0	1	2	1	1	13
EU Regulation on forced labour	0	0	0	0	0	0	0	3	2	2	1	0	0	1	9

Potential of European public interventions:

0	No specific baseline or indirect positive impact expected
1	Potential impact, but no specific objective is introduced
2	The problem is discussed and specific targets are identified
3	The problem is at the core of the instrument

The evaluation values the legislations which have placed a root cause at the centre of their text with the highest score (3): legislations such as the regulation on products resulting from deforestation or the European regulation on forced labour do however have a score weaker than others because their spectrum of influence touches very little on root causes. Conversely, legislation with a horizontal focus, such as the upcoming EU legislative framework on sustainable food systems and the EU Corporate Sustainability Due Diligence Directive (CSDDD), are considered to have strong potential on multiple root causes with a cross-cutting scope that addresses all value chains. As with voluntary multi-stakeholder initiatives, it is interesting to note that only a small number of European legislations specifically address mechanisation, or the development of monoculture models and the concentration of power within value chains, with identified targets.

Legislative initiatives at the federal level

Beyond the European area, Belgium also has a fundamental role to play at federal level through the adoption of strong national legislation, orientation documents, action plans, or ambitious national laws transposing EU regulation which can help address potential weaknesses in EU legislation. Although the Federal Parliament has residual competences in specific areas directly related to the subject matter, such as international trade, foreign policy, development cooperation and public health, we are aware that the distribution of competences often deviates from the formal distribution contained in the special law of August 8, 1980. When we speak of national legislative interventions, it may therefore be that in some cases federal jurisdiction is more difficult to identify and that in other cases, it is necessary to engage regions and communities as legislators.

To help prioritise the commitment of the Belgian Federal authorities on current or future legislative initiatives, these have been analysed and rated according to their potential impact on the various root causes of the social and environmental impacts of international agri-food value chains. In the research report attached to this synthesis, we have provided a detailed analysis of the multiple possibilities of intervention for the Federal Government, bearing in mind the importance of engaging with the political nature of the instrument, but also in its technical nature. For this reason, we also provide examples from other jurisdictions where measures similar to those proposed have been discussed or implemented, and we reflect on the possibility for the Belgian Federal Government to use the European legislative framework not as a point of arrival, but as a starting point for even more sustainable regulation.

The evaluation values the legislations which have placed a root cause at the centre of their text with the highest score (3): in the first place the **regulations for sustainable public procurement** which have a potential on a large number of root causes, with a sum of 40 to 50 billion euros per year, or 15% of Belgian GDP. There is also the **revision in national law of the Directive on unfair commercial practices (UTP) and competition law**, two national laws which have a capacity to directly mitigate the concentration of power in international agri-food value chains, unlike the vast majority of European legislation and multi-stakeholder voluntary initiatives reviewed above. A legislative initiative on stock exchange speculation concerning agricultural commodities could be a pioneering initiative in Belgium, which would fill the gap of a mechanism for mitigating the volatility of international prices in international agri-food value chains – a critical dimension, given that the lack of capacity of family farmers to anticipate their income and save is the main structural cause of a number of impacts such as child labour, deforestation, the use of pesticides, etc.

Beyond public procurement, three pieces of legislation appear to be at the forefront for their potential impact on multiple root causes of the socio-environmental impacts of imported agri-food chains:

- The **federal proposal for due diligence** for private operators throughout their supply chain, for which an ambitious Belgian version can point the way for the current European discussions on the EU Corporate Sustainability Due Diligence Directive (CSDDD). The existence of a European framework should not prevent national interventions. On the contrary, the adoption of the European CSDD

Directive will oblige Belgium to translate its content into its national legislation and to adapt it to its aspirations and those of its constituents. A national debate on the CSDDD is therefore a prerequisite for the setting out an ambitious national plan, and it is an opportunity to ensure that Belgium and its companies are at the forefront of the transition towards sustainable agri-food value chains in both the social and environmental dimensions. Thus, the ambitions of the bill are a valuable starting point, and its interaction with the Beyond Food strategy might become a term of reference for other Member States;

- An initiative to **ban the export of pesticides that are illegal according to national and EU law**, the impact of which would be very significant on several root causes of the socio-environmental impacts identified in the value chains. In this case, the intervention would be even easier because it is not a question of modifying behaviours and practices which take place in a foreign jurisdiction, but of tackling a production which takes place on Belgian territory and which has an impact on people and ecosystems outside Belgium and, when certain goods are imported, also on people and animals in Belgium;
- A **revision of the policy on biofuels**, as their role is impactful: 24% of biofuels imported into Belgium in 2020 come from palm oil imported from Malaysia and Indonesia.¹⁹ The "Beyond Food" strategy cannot be limited to crops intended for human consumption; it must go beyond this and address forms of use that are not directly linked to "usual" consumers.

As with voluntary multi-stakeholder initiatives and European legislation, it is interesting to note that a very small number of Belgian regulations specifically address mechanisation and the development of monoculture model within value chains with identified targets.

¹⁹ Inter-environnement Wallonie et al, Evaluation of the Belgian policy for the incorporation of agrofuels, N° 4 - March 2022

Table 9: Scoring of the ability of Belgian legislation to act on the root causes of the social and environmental issues of global agri-food value chains

Belgian legislation	Expansion of agri. spaces (to detriment of forest)	Mono-crop models	Synthetic fertilisation	Mechanisation	Dangerous pesticides	Water consumption	Investment capacities (small producers)	Labour law violation	Precarious employment - Difficult work	Occupational health and safety	Discrimination	Commodification / Low prices	Price volatility	Concentration of power	TOTAL of 42
Sustainable public procurement	3	2	3	2	3	3	3	2	2	2	2	3	2	2	34
Due diligence legislative proposal	2	0	2	0	2	2	2	3	2	2	2	3	1	0	23
Ban on sales of pesticides produced in Belgium that are illegal according to national and EU law	1	2	2	2	2	2	0	0	2	2	0	0	0	1	16
Belgian Unfair Trading Practices Law (application of EU Directive + potential revision)	0	1	1	0	1	0	2	2	2	0	1	2	0	3	15
Competition law	0	0	1	0	1	0	0	1	1	1	0	2	1	3	11
Curbing speculation on food commodities and global volatility	0	0	1	0	1	0	0	1	1	0	0	2	2	2	10
Non-financial information	1	0	1	0	1	1	0	1	1	1	2	0	0	0	9
Fiscal system and VAT	0	1	1	0	1	1	1	0	0	0	0	0	0	0	5
Legislation on biofuels and feedstocks	2	0	0	0	0	0	0	0	0	0	0	0	0	0	2

Potential of Belgian public interventions:

0	No specific baseline or indirect positive impact expected
1	Potential impact, but no specific objective is introduced
2	The problem is discussed and specific targets are identified
3	The problem is at the core of the instrument

The research report contains a series of recommendations for each of the Belgian initiatives that could be taken at the Federal or territorial level (public procurement), based on specific examples from other European countries.

Table 10: Scope and timetable of relevant Belgian regulatory initiatives

Federal initiative	Perimeter	Schedule
Sustainable public procurement	Universal: 16 agri-food value chains	Different authorities with their respective calendar
Due diligence at the national level	Universal: 16 agri-food value chains	Bill presented to the Belgian Federal Parliament on April 2, 2021
Ban on the export of pesticides that are illegal according to national and EU law	Universal: 16 agri-food value chains	Current political debate
National transposition of the Unfair Trading Practices Directive (UTP) & revision	Universal: 16 agri-food value chains	Entry into force on December 25, 2021 and revision of the national transposition in Belgium (2024)
Competition law	Universal: 16 agri-food value chains	
Curb food speculation	Universal: 16 agri-food value chains	N / A
Non-Financial Reporting / Corporate Sustainability Reporting Directive (CSRD)	Universal: 16 agri-food value chains	Directive 2014/95/EU published in 2014 and transposed into Belgian law in 2017.
Taxation and VAT	Universal: 16 agri-food value chains	
Biofuels legislation	Prohibition of the use of palm oil Ban on the use of soy	Announced for January 2023 Announced for July 2023

The leverage score

The methodology for assessing leverage, of both public authorities and the private sector, for each of the 16 agri-food value chain, followed several stages, including in particular:

- A mapping of voluntary initiatives and legislative interventions (European and national levels) that can act positively on the root causes (above);
- Assessing their potential or proven impact on the root causes.

Considering the socio-environmental challenges of the agri-food chains and the way in which public and private initiatives engage with the root causes, we have tried to combine these elements in a single graph. With this table, we give an approximation of the sustainability potential that exists in each agri-food chain based on the public and private instruments that are already available, that will be implemented or that could be

implemented. We are aware of the speculative nature of the exercise, and of the fact that leverage depends on the way in which the existing instruments (public and private) are implemented and – even more so – on the way in which future instruments will be developed. This is why we provide in the full report detailed suggestions on the content of future initiatives and on how to redefine existing initiatives. Finally, the starting point is that no private initiative is sufficient on its own: a solid and adapted mandatory framework should be a requirement for the "Beyond Food" strategy.

On the basis of these elements, the project carried out a cross-check by value chain according to the levers identified which can be activated for each of the commodities. The following notation was adopted:

- 0- Absence of a specific lever;
- 1- Existence of at least one instrument (public or private) that can be used;
- 2- Possibility of combining both public and private instruments, however the public instrument does not specifically address the chain in question;
- 3- Possibility of combining both public and private instruments, and the public instrument specifically targets this agri-food chain (or has the potential to be reformed in this direction).

Unsurprisingly, it is cocoa and coffee that appear to be the most amenable to influence. Paradoxically, some value chains that concentrate a very high number of issues, with a high unsustainability score such as those for shrimp, are very poorly rated for being influenced. This underlines the importance for the Belgian federal government to consider going beyond a simple prioritisation of individual value chains/commodities, and to favour a more holistic approach.

Table 11: Scoring of the leverage on global agri-food value chains, by theme

Value chain	Expansion of agri. spaces (to detriment of forest)	Mono-crop models	Synthetic fertilisation	Mechanisation	Dangerous pesticides	Water consumption	Investment capacities (small producers)	Labour law violation	Precarious employment - Difficult work	Occupational health and safety	Discrimination	Commodification / Low prices	Price volatility	Concentration of power	TOTAL of 42
Cocoa	3	1	2	1	2	2	2	2	2	2	2	2	1	1	25
Coffee	3	1	2	1	2	2	2	2	2	2	2	2	1	1	25
Palm oil	3	1	2	1	2	1	2	1	1	2	2	2	1	1	22
Soy	3	1	2	1	2	1	1	2	2	2	2	2	1	1	23
Tea	2	1	2	1	2	2	2	2	2	2	2	2	1	1	24
Rice	2	1	2	1	2	2	2	2	2	2	2	2	1	1	24
Bananas	2	1	2	1	2	1	2	2	2	2	2	2	0	1	22
Cane sugar	2	1	2	1	2	2	2	2	2	2	2	2	0	1	23
Pineapple	2	1	2	1	2	2	2	2	2	2	2	2	0	1	23
Cashew nut	2	1	2	1	2	2	2	2	2	2	1	2	0	1	22
Orange juice	2	1	2	1	2	2	2	2	2	2	1	2	0	1	22
Avocado	2	1	2	1	2	2	2	2	2	2	1	2	0	1	22
Grape	2	1	2	1	2	2	2	2	2	2	1	2	0	1	22
Hazelnut	1	1	1	1	1	1	1	1	1	2	1	2	0	1	15
Shrimp	1	1	1	1	1	1	1	1	1	2	1	2	0	1	15
Honey															0

Which global value chains to prioritise

The objective of this study is to develop a weighting framework for prioritising agri-food value chains according to:

- risks in terms of sustainable development in these food chains;
- potential levers from the Belgian authorities and private sector to make these value chains more sustainable;
- potential links with Belgian development cooperation partner countries.

The 14 priority countries for Belgian cooperation²⁰ are mainly located in sub-Saharan Africa and do not correspond to the top five import countries identified for each agri-food sector: consequently, this third dimension is ultimately not retained in the weighting.

Priority value chains

The aggregation of the sustainability risk and ability to act scores indicate a prioritisation of international agri-food value chains on which to act first. The aggregate score was obtained by simply adding the non-sustainability score and the leverage score.

Table 12: Aggregate score to prioritise the 16 global agri-food value chains imported into Belgium

Non-sustainability score		Leverage score		Aggregate score	
Coffee	24	Cocoa	25	Coffee	49
Soya	23	Coffee	25	Cocoa	44
Sugarcane	21	Palm oil	22	Soya	46
Palm oil	20	Soya	23	Palm oil	42
Shrimp	20	Tea	24	Sugarcane	44
Tea	19	Rice	24	Tea	43
Cocoa	19	Bananas	22	Rice	42
Rice	18	Sugarcane	23	Shrimp	35
Orange juice	16	Pineapple	23	Bananas	37
Grapes	16	Cashew nut	22	Orange juice	38
Bananas	15	Orange juice	22	Grapes	38
<i>Pineapple</i>	<i>13</i>	<i>Avocado</i>	<i>22</i>	<i>Pineapple</i>	<i>26</i>
<i>Avocado</i>	<i>10</i>	<i>Grapes</i>	<i>22</i>	<i>Avocado</i>	<i>22</i>
<i>Hazelnut</i>	<i>9</i>	<i>Hazelnut</i>	<i>15</i>	<i>Cashew nut</i>	<i>21</i>
<i>Cashew nut</i>	<i>8</i>	<i>Shrimp</i>	<i>15</i>	<i>Hazelnut</i>	<i>20</i>
<i>Honey</i>	<i>0</i>	<i>Honey</i>	<i>0</i>	<i>Honey</i>	<i>0</i>

In terms of severity of social and environmental impacts and capacity to intervene (leverage), it should be noted that the same 4 value chains appear to be priorities:

- Coffee;
- Cocoa;

²⁰ According to the official list of countries as of October 4, 2022: <https://diplomatie.belgium.be/fr/politique/cooperation-au-developpement-et-aide-humanitaire/pays>

- Soya;
- Palm oil.

For fifth place, on the other hand, the result is very different depending on the score:

- **Shrimp** appears to be the value chain with the worst impacts, particularly social ones (modern slavery);
- **Tea** appears to be the value chain offering significant leverage;
- But at the level of the aggregate score, it is **the sugarcane industry** that appears as the priority intervention chain.

The groups of priority agri-food value chains appear to be similar, except for two chains:

- The **grape** value chain and the **shrimp** value chain have severe impacts, but on the other hand do not appear in the priority value chains on which there is leverage/a capacity for action;
- Conversely, the **pineapple and cashew nut value chains** would have relatively less impact, but the ability to intervene in these chains would be easier.

For the BASIC-FTAO-University of Antwerp consortium, such a prioritisation of commodity value chains does not constitute an encouragement to work on a silo approach, commodity by commodity, in order to mitigate their social and environmental impacts. On the contrary, the above analysis of initiatives at the national and European level emphasises some lessons learned that are essential for effective policy action:

- A number of minimum requirements to make a multi-stakeholder initiative for a value chain actionable;
- A binding regulatory framework to realise the full potential of multi-stakeholder initiatives for the governance of the value chains;
- Strong regulatory initiatives across the different value chains.

The recommendations of the project are detailed in the following section.

Cross-cutting recommendations

The need to develop a systemic approach

In addition to the technical recommendations contained in each section of this research report and the scoring of the different global value chains, our analysis led us to identify certain cross-cutting lessons which, we hope, can help guide Belgium's future strategy.

We believe that, in contrast to an approach that would be more restrictive (by commodity or country, for instance), the most appropriate approach is one that is systemic and that considers the multiple interconnections and similarities beyond the specificities of each value chain. This is all the more true given that many deep-rooted causes and drivers appear to be cross-cutting (for example, the low valuation of raw materials, or producers' inability to forecast income, thus hampering their ability to make investments that would increase the sustainability of their production).

Similarly, we recommend that the Belgian authorities move away from a "silo" approach to sustainability; instead, they should favour interventions and political positionings that are capable of triggering multiple co-benefits along the different pillars of sustainability. In this sense, the analysis shows that tangible progress within supply chains can be jeopardised when, for instance, a legislation whose primary objective is of an environmental nature is not leveraged to drive also positive change on socio-economic factors.

The national "Beyond Food" strategy offers a unique opportunity to move from competing to converging priorities, by linking analysis and intervention. The establishment of sustainable food systems can contribute to multiple policy objectives and vice versa: this means that complementarity and policy coherence must be strengthened to remedy the current legislative patchwork, in order for these policies and laws to have a lasting impact on global agri-food value chains. This systemic approach and the policy coherence must be reflected institutionally through increased cooperation and inter departmental work.

Going beyond the limits of voluntary multi-stakeholder initiatives

When creating any new form of multi-stakeholder initiative for the governance of a global agri-food value chain – or just in order to improve the existing ones – it is necessary for the initiative to follow minimum principles that would increase its transformative capacity and the accountability of its members:

- ✓ An effective and stable role played by public authorities over time, beyond a narrow donor-beneficiary relationship and towards a common long-term vision on joint sustainability objectives
- ✓ A governance system that balances power inequities in the value chain
- ✓ The accountability and transparency of members for the information to be collected and/or published
- ✓ The existence of a grievance and internal control mechanisms
- ✓ The adoption of a transparent normative framework to be enforced (internationally recognised standards, criteria, certification), with an obligation to comply
- ✓ The ability to sanction or exclude certain actors in breach of the normative framework
- ✓ The inclusion of representatives of the countries of production: producers' organisations, trade unions, civil society organisations, including those affected by agricultural production, as well as government representatives.

From the perspective of consumer countries such as Belgium, it also seems wise to integrate stakeholders from international cooperation more actively into these platforms.

Multi-stakeholder initiatives in international agri-food value chains, as we have seen, can achieve a better valuation of the production and make it more sustainable. However, this should not exempt these initiatives

from reflecting on the redistribution of the value created within a given global value chain. In this context, we believe it is important to rethink the current order of priorities. A multitude of sustainability programs have been developed in recent years under the umbrella of these multi-stakeholder initiatives. Although we do not question their usefulness, we stress that these programs are not intended to tackle the underlying causes of non-sustainability. It therefore seems essential to reverse the logic by considering the issue of the redistribution of value as the main entry point, and by using these pre-competitive spaces to progress on these issues.

To trigger a sustainable social and environmental transition in the sector, the way profits are distributed along the chain must change. The reinvestment of the profits made by actors of a global value chain linked to a multi-stakeholder initiative must not be decided by processors, brands or distributors (via corporate social programs for example). There is concentration of power and asymmetry of information at these levels of the chain that causes a number of socio-environmental impacts. Today, the burden of following regulatory constraints or joining voluntary initiatives to improve the social and environmental impact of global agri-food chains falls on farmers and producers, without giving them a voice in the matter. They must be part of the decision to reinvest value – which without them would not be created.

Implement binding, (more) ambitious public interventions

The analysis undertaken allows us to highlight a few cross-cutting priorities and guiding principles when designing or reframing food supply chain sustainability policies.²¹

First, many human rights violations and environmental abuses are systemically embedded in food supply chains and will need to be addressed as such. Instead of focusing on the symptoms, any legislation that wants to be truly transformative will need to put in place specific provisions with leverage on underlying drivers of these problems. As concerns legislative tools based on a due diligence process, this calls for the establishment of strict obligations for companies to change their purchasing practices to allow producers to earn an income sufficient to cover the costs of socially and environmentally responsible production.

A consumer country downstream of a global agri-food value chain should properly take into account the various linkages across production, processing and marketing levels in the value chain, as well as the constraints of each actor to meet new sustainability requirements. To ensure the inclusiveness of the transition process, it is particularly relevant for Belgium to push for the amendment of legislative instruments to avoid negative repercussions on, or even the exclusion from the market of, economic players who are in the most vulnerable situation. It is critical to ensure that the costs of compliance with the new sustainability requirements are shared equitably between actors across the supply chains, in line with their respective capacities.

The issue of stakeholder engagement in producing countries should also be seen as central to improving inclusiveness, transparency, and accountability within agri-food value chains. It is therefore recommended that the Belgian authorities increase the consultation process with actors of the agri-food value chains, including the most marginalised, in order to shape regulatory frameworks that reflect the needs and realities of the producing countries. This also involves integrating meaningful stakeholder engagement into the core due diligence obligations of economic actors, to ensure an inclusive, informed, and high-quality process.

Furthermore, building a just and sustainable transition requires placing smallholders and local communities and their economic reality at the heart of the legislative tools that are likely to affect them. Smallholders are responsible for producing a third of the world's food supply and form the backbone of the economy in many

²¹ The project's research report contains a number of specific recommendations for each of the Belgian or European regulatory initiatives analysed.

partner countries. They must be part of the equation. This notably involves carrying out impact studies prior to any new legislative intervention, setting up specific measures to support producers' compliance with new sustainability requirements, and overall putting in place solid partnerships with producing countries that take these realities into account.

Finally, the effectiveness of the transition will also depend on the level of overall coherence so that policies and legislative tools communicate effectively with each other, and can mutually reinforce each other.

Create an enabling environment towards ecological and social transition

Informed public policies

The globalisation of the agri-food value chains has contributed to increasing the opacity of the system, partially due to multiplication of the steps from production to consumption and, thus, of the territories and actors impacted. We found out throughout the project the lack of tangible and comparable data on these agri-food value chains for both researchers or political leaders. To remedy this situation at Belgian and European level, it is recommended:

- To invest in research programs on the social and environmental impacts of agri-food value chains with quantitative indicators across the various steps of the global value chains and territories. Research should have a spectrum as broad as the 15 themes of the BASIC food sustainability compass, in order to cover both environmental and social topics (discrimination, child labour or forced labour, etc.) and to target subjects that have not yet been systematically studied on the various global value chains (the capacity to recycle waste, greenhouse gas emissions, animal welfare, etc.);
- To set up a scientific corpus which would cover many global value chains and countries. This could then be used by political leaders to go beyond the current legislative approaches which require companies to demonstrate that they are virtuous in their management of risks throughout their supply chain (due diligence), and thus reverse the burden of proof every time the risk of a significant violation is proven in relation to a specific global agrifood value chain and a specific geographical area. Similar to what was proposed in the Belgian corporate due diligence law proposal, the United States passed a legislation in 2005 which mandates public authorities to draw up the list of the value chains and countries where the risk of forced labour and child labour is proven,²² making it possible for any person to have information for each of the countries and value chains analysed in this project.

In this perspective, the Belgian authorities should revise the recording of their customs data to increase transparency on the supply of their international agri-food chains (and those of their European neighbours), on two specific points:

- The traceability of products imported from the common European market,²³ to know the country of origin of the commodity;
- The traceability of the origin of the raw material in the case of import of semi-processed products.

A coherent set of public policies in favour of a sustainable transition of food systems

²² This is the Trafficking Victims Protection Reauthorization Act (TVPRA) adopted in 2005. The list of countries and sectors is available at the following link: <https://www.dol.gov/agencies/ilab/reports/child-labor/list-of-goods>.

²³ Imports from the EU in 2019 accounted for 80% of the total value of imports into Belgium and 86% of the total volume imported into Belgium (see research report by BASIC, FTAO and University of Antwerp).

Any reflection on the sustainability of the global agri-food value chains imported into Belgium should include a reflection on the role of Belgium at the multilateral level. As a member of the international community of States, Belgium has the right to vote in key organisations that have a direct influence on the construction and governance of global agri-food value chains, such as the United Nations General Assembly and the World Trade Organization. Belgium can also enter into bilateral and multilateral agreements with other countries to address issues specific to their economic, social, historical, or trade relations.

The different processes on which Belgium could intervene at the multilateral level are described in a section above with specific recommendations, in particular on the following three processes which seem to be particularly significant:

- Drawing up and adopting new international agreements on agricultural commodities with the producing and importing countries of agricultural commodities;
- The integration of social and environmental sustainability concerns in the position that the Belgian State will adopt during the negotiations on the future of the World Trade Organization (WTO);
- The approval of the legally binding instrument on transnational corporations which is currently in the negotiation phase within the intergovernmental working group of the UN Human Rights Council

Many of the negative externalities identified in agricultural value chains will not be effectively tackled if they are only addressed through unilateral legislative measures or mandatory market access requirements. Addressing these externalities requires broader systemic changes.

Global trade in its current configuration and the model of free trade agreements are identified as worsening the main challenges faced by food systems; however, the EU and its Member States are particularly well placed to reverse this trend by ensuring that sustainability objectives are systematically embedded among the core objectives of trade agreements. In doing so, it is a question of banning any commercial practice that would cancel, contradict, or water down the positive incidence generated by ambitious legislative interventions. It is especially desirable that trade agreements include chapters on sustainable development and on sustainable food systems. It is also critical to address their degree of impact and their effective implementation.

Beyond a sole focus on international trade patterns, a renewed ambition in terms of the sustainability of global agri-food chains will also require reinforced support to regional food systems in partner countries of Belgium.

At the same time, more attention needs to be paid to how cooperation programs and policies could foster an enabling environment for the achievement of the objectives set out by the legislative instruments. This can be a powerful lever to guarantee that the instruments analysed translate into tangible results, and that they are not hampered by local institutional or structural obstacles – this may require supporting governance reforms and national participatory processes. Cooperation programs can also serve as an effective tool to protect those who are most vulnerable in the transition of international agri-food chains.

More generally, it will also be necessary to ensure that the financial support dedicated to agricultural, rural and urban development in partner countries is fully aligned with the overall objective of a socially and ecologically responsible transition. This financial support can contribute to address the gaps identified in the regulatory frameworks: for instance, these initiatives could support the transition from a production system based on monoculture, which exposes farmers to commercial and environmental risks, to more sustainable production methods based on agroecological principles.

Consumption transition

Reducing the social and environmental footprint of our food systems is also closely linked to changing consumer habits and diets. Here again, additional national measures linked to the awareness of citizens could

be taken. Creating more sustainable global agri-food value chains is a demand issue: the greater the demand for significant volumes of non-European products at low prices, the greater the pressure is on the sustainability of production and processing in the countries of origin. Belgian and European public policies have a role to play in reducing the excessive consumption of certain products in the context of health prevention (fat and sugar). The modification of current dietary habits should also concern the consumption reduction of certain specific products (tropical products, meat – and indirectly imported cereals, such as soya, consumed by animals, and agricultural products which are transformed into biofuel, such as palm oil and sugarcane). The range of public policies to do this is very wide: health prevention, tax policies, public procurement rules for public services, school lunches, etc.

