

Food and Agriculture Roadmap

Chapter on policy recommendations from a consumer perspective



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① Executive summary



① Executive summary

The Food and Agriculture Roadmap serves as the implementation plan for WBCSD's [CEO Guide to Food System Transformation](#) by setting out the overarching transformational targets, key action areas and business-led solutions required to achieve environmental sustainability, equitable livelihoods, and healthy and sustainable diets for all. It builds on the body of work developed by WBCSD's [Food Reform for Sustainability and Health \(FReSH\)](#), [Scaling Positive Agriculture \(SPA\)](#) and [Global Agribusiness Alliance \(GAA\)](#) projects.

This Policy chapter consolidates the outputs of the Science-to-Policy Dialogues hosted in 2020 and frames clear recommendations for food systems transformation. This process brought together

academia, business and civil society to co-construct policy recommendations that the business community can bring forward to international bodies and, as applicable, national governments to translate these policy asks into tangible action. While the first section of this chapter focuses only on the consumer perspective, the second Science-to-Policy Dialogues (hosted in 2021) will focus on the producer perspective.

Through the iterative research and consultative process, we put forward three clear policy asks from a consumer perspective:

1. Establish global guidelines, supported by national standards and incentives, to standardize healthy and sustainable diets and build consumer trust

2. Create an enabling environment to educate consumers on healthy and sustainable choices, and ensure responsible marketing practices and advertising to normalize consumption of a healthy and sustainable diet
3. Commit to embedding health and sustainability requirements within public procurement

In addition, this chapter also sets out key enablers which will support the realization of these policies, as identified by businesses. These enablers include:

- Coordinate policies and actions
- Leverage data and technology to increase transparency
- Invest in improving infrastructure



② Context



② Context

THE NEED FOR FOOD SYSTEMS TRANSFORMATION

Food systems include everything involved in feeding people and animals, from growing and harvesting to trading, processing, marketing, distribution, consumption and disposal.¹ Current food systems, while having accomplished significant milestones in helping nourish the world, are also often fragmented and unsustainable. Major scientific and economic reports (e.g. [IPCC](#), [IPBES](#), [FOLU](#), [SOFI](#), [EAT-Lancet](#)) are all sounding a clear alarm on the urgent need to act today. Public opinion and consumer demands are increasing pressure but also creating business opportunity to build equity and resilience across food systems.

The global food system has expanded significantly, growing to meet the needs of increasing populations around the world, which is expected to exceed 9 billion by 2050.² However, some old challenges remain, and new ones have appeared. Current diets are resulting in global health crises of both over- and under-nutrition. Globally, one in nine people are hungry or undernourished, and the number of people affected by hunger is expected to surpass 840 million by 2030.³ In addition, one in three people are overweight or obese.⁴ As noted below, the impact of the COVID-19 pandemic, with its far-reaching implications for food security, is significantly increasing the number of people facing hunger.

In parallel, the planet's natural resources are being stripped at an unprecedented rate, leading to the loss of ecosystems, soil erosion and freshwater scarcity.⁵ Emissions from the global food and agriculture system are estimated to be responsible for up to 37% of total net anthropogenic greenhouse gas emissions.⁶ The impacts of climate change are already being felt across agricultural systems, as increases in average temperature and extreme weather events have caused disruption and losses.⁷ Food loss and waste is significant across the whole value chain. Approximately one third of all food is lost or wasted between the farm and the fork, generating 8% of global greenhouse gas emissions and resulting in USD \$940 billion in economic losses globally each year.⁸

COVID-19

The COVID-19 pandemic has exacerbated the existing weaknesses of the global food and agriculture system. It has highlighted a wide range of systemic issues, ranging from unequal access to food and nutrition to poor working conditions, food loss and waste, as well as the destruction of nature by non-sustainable agricultural practices and the increase of zoonotic diseases transmitted from animals to humans.

As a result of the pandemic, the challenges already facing food systems are growing deeper, making the need for food system transformation even more urgent. A dramatic illustration of this is the fact that experts predict the addition of 83 to 132 million people to the total of those undernourished worldwide in 2020 compared to 2019.⁹

ROLE OF THE PRIVATE SECTOR

The private sector is responsible for almost all the food produced, sold and consumed globally. Therefore, businesses have a central role to play in improving food production and consumption worldwide. Some recent signals of change are offering food value chain companies a unique opportunity for action to transform the food system and bring about multiple co-benefits for climate, biodiversity and health, while also creating business opportunity. As hunger increases and governments deploy stimulus packages around the world to mitigate the economic consequences of the COVID-19 pandemic, the private sector is ready to redesign and accelerate solutions to deliver a more resilient system that provides healthy and sustainable diets for all.

3 Introduction to the Food & Agriculture Roadmap



③ Introduction to the Food & Agriculture Roadmap

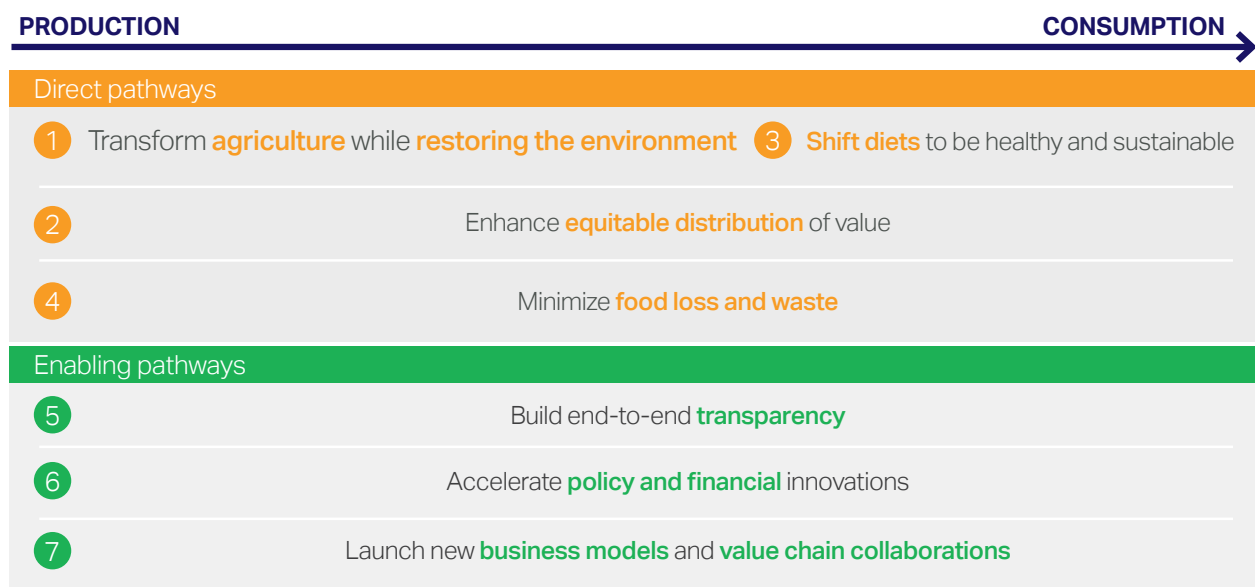
PURPOSE OF THE ROADMAP: FROM TRANSFORMATION PATHWAYS TO ACTION AREAS AND SOLUTIONS

The Food and Agriculture Roadmap serves as the implementation plan for [WBCSD's CEO Guide to Food System Transformation](#) by setting out the overarching transformational targets, key action areas and

business-led solutions required to achieve environmental sustainability, equitable livelihoods, and healthy and sustainable diets for all. It builds on the body of work developed by WBCSD's [Food Reform for Sustainability and Health \(FReSH\)](#), [Scaling Positive Agriculture \(SPA\)](#) and [Global Agribusiness Alliance \(GAA\)](#) projects.

The Roadmap calls on companies to work actively to address the issues of healthy and environmentally sustainable production and consumption by delivering integrated solutions to transform food systems. Achieving food system transformation will also require the development of supportive policy, regulatory and financial frameworks.

Figure 1: Seven pathways where business can lead to accelerate transformation



FOOD AND AGRICULTURE ROADMAP: CHAPTERS

WBCSD's Food and Agriculture Roadmap provides implementation guidance for the pathways outlined in the CEO Guide to Food System Transformation in a series of chapters as below.

The [Healthy and Sustainable Diets](#) chapter was launched in November 2020, which this chapter complements with policy recommendations based on the consumer perspective focused on changing diet and consumption patterns. The remaining chapters of Agricultural Transformation and Equitable Rural Livelihoods will be launched in 2021. Food loss and waste are covered in the chapters on Healthy and Sustainable Diets (food waste) and Equitable Rural Livelihoods (food loss).

It is necessary to scale the action areas and solutions put forward in the various chapters together because each depends upon and reinforces the others. All of them require action from national governments, business, the financial sector, civil society – including academia – and the international community.

THE ROADMAP CHAPTER ON POLICY

The chapter on Policy builds on the work of the WBCSD's Science-to-Policy Dialogues and outlines policy recommendations from business to international bodies as well as national governments.

The first part of the chapter focuses on policy recommendations from a consumer angle – what policy recommendations need to be implemented for consumers to make healthy and sustainable choices.

The second part of the chapter will focus on the production angle – which policies need to be implemented for food to be produced sustainably. The second section of the chapter will be launched in 2021, after conducting the second round of Science-to-Policy Dialogues.

APPROACH

WBCSD has convened businesses, academics, policy experts and civil society organizations working in food and agriculture to collectively understand the opportunities and challenges facing food systems transformation and coalesce around concrete policy asks for discussion at the UN Food Systems Summit (UNFSS).

The Policy Chapter of the Food and Agriculture Roadmap will focus on two perspectives: the consumer and the producer, although the final recommendations will require a holistic approach with applicable targeted action.

To date, WBCSD has developed the Policy chapter from a consumer perspective (with a parallel process for the producer perspective planned for early 2021) through a rigorous and iterative research and consultative process, including the following steps:

Background paper – A desk-based review of the existing science and policy literature on achieving food system transformation through the lens of consumption.

Delphi Dialogue – alongside a background paper, we led a preliminary digital consultation to explore the challenges facing the food system and to develop a targeted number of themes that would be discussed in more detail during the workshops. Over the course of three rounds, the facilitator reached out to all participants with detailed probing questions and asked for written feedback, which was shared anonymously with all participants between each round.

FOOD AND AGRICULTURE ROADMAP CHAPTERS



Healthy and Sustainable Diets
(including food waste)
(already available)



Agricultural Transformation
(available in 2021)



Equitable Rural Livelihoods
(including food loss)
(available in 2021)



Policy

WBCSD consolidated the discussion into a [23-page document](#).

Science to Policy Dialogues (SPD)

– The virtual SPD workshops, which took place over three half-days, brought together a unique blend of participants from business (WBCSD members), science, policy and civil society to challenge and support each other in a pre-competitive space operating under Chatham House Rule. Panel discussions and presentations from members of the cohort engaged participants on a range of tangible examples before participants formed smaller groups to explore potential policy solutions across consumer supply and demand and across global trade.

The final policy solutions were presented to a panel of “critical friends”, senior experts from academia and industry, who challenged and further developed the policy.

SPD Rapid Summary Outcome Paper

– Following the workshops, we developed a rapid outcome paper to synthesize the outcomes from the sessions and to solicit immediate feedback from participants in order to inform the development of this chapter.

This Policy chapter brings together the outputs of this iterative research and consultative process to put forward **three clear policy asks from a consumer perspective**:

- 1. Establish global guidelines, supported by national standards and incentives, to standardize healthy and sustainable diets and build consumer trust**

- 2. Create an enabling environment to educate consumers on healthy and sustainable choices, and ensure responsible marketing practices and advertising to normalize consumption of a healthy and sustainable diet**

- 3. Commit to embedding health and sustainability requirements within public procurement**

These policy areas have been prioritized from a wide-ranging and rich discussion, and they address the key challenges consumers are facing. Our recommendation for international bodies and national governments is to translate these policy asks into tangible action.

Across the range of recommendations presented, the potential success of each is dependent upon the context in which it is implemented and the relative maturity of the business-government-consumer relationship. Policy interventions should reflect the geographic, socio-economic, cultural differences and dietary habits of the consumers being targeted, as well as the food transformation stage that the country is in.

We have provided relative maturity of each policy recommendation across the following categories, as some still require further work to determine their practical application and feasibility:

- **Green:** Clear path to implementation. The policy recommendation is already in use in some jurisdictions and is ready to be rolled out in other regions, and countries can learn from best practices and examples.

- **Yellow:** Work on alignment is required. The policy recommendation has been developed and used in specific contexts, however, further work to ensure alignment is required to roll out the recommendation elsewhere and to ensure it is implementable on a local level and is context-specific.
- **Red:** Nascent. Currently, there is no clear consensus around the policy recommendation. Further work is required to develop clear recommendations.

Finally, this chapter sets out key enablers which will support the realization of these policies, as identified by businesses. These enablers include:

- 1. Coordinate policies and actions:** Coordination of policies and actions between and within governments, academia, business and civil society yields better aligned incentives and higher consumption of healthy and sustainable food.
- 2. Leverage data and technology to increase transparency:** Better data and technology, and clear rules around privacy and usage, offer exciting opportunities to facilitate transparency and accountability in food systems.
- 3. Invest in improving infrastructure:** Core infrastructure such as better roads and cold storage can increase access to fresh, healthy, sustainable and affordable food.

④ Policy recommendations from a consumer perspective



④ Policy recommendations from a consumer perspective

In the next section, we will outline our three overarching global policy recommendations. This section is built up out of “the challenge” which sets the context and issues at hand, followed by global and regional/local policy recommendations to guide decision making.

POLICY ASK 1: ESTABLISH GLOBAL GUIDELINES, SUPPORTED BY NATIONAL STANDARDS AND INCENTIVES, TO STANDARDIZE AND NORMALIZE HEALTHY AND SUSTAINABLE DIETS AND BUILD CONSUMER TRUST

THE CHALLENGE

Research suggests that achieving healthy diets from sustainable food systems for 9.8 billion people by 2050 is possible, but not without significant action across the value chain, especially the reduction of animal-sourced foods in predominantly G20 countries and increased consumption of healthy plant-based foods universally.^{10,11,12}

However, there are currently no global guidelines covering both health and sustainability for food, and existing national dietary guidelines are currently not ambitious enough to bring food systems within planetary boundaries. As a result, multiple definitions of healthy and sustainable diets are used across governments, businesses, academia and civil society, leading to confusion for consumers on daily food choices.

In addition, food pricing often does not reflect the true value of food as it fails to account for the negative social and environmental impacts associated with its production or its contribution to a healthy diet, as these externalities are not passed through to consumers.¹³

These misaligned financial incentives hide the true cost of “cheap” food and make healthy, sustainable food products unaffordable for many. There are often hidden costs to unhealthy diets which governments, and consumers end up paying for through increased healthcare-related costs. For example, in the UK for every £1 consumers spend on food, additional costs of 97p are incurred, including natural capital degradation (31.1p), diet-related disease (37.4p) and production-related ill-health.¹⁴

POLICY RECOMMENDATIONS

Recommendations have been developed to guide decision making at both the global and regional and/or national scale.

Global policy recommendations:

- **Develop global guidelines and certifications:** Build on existing food systems frameworks (e.g. Codex Alimentarius; the High Level Panel of Experts created by the UN Committee on World Food Security) and research on planetary boundaries^{15,16,17} to enable governments, businesses and civil society to agree on a set of global guidelines at the UN Food Systems Summit in September 2021. These guidelines will set parameters for healthy and sustainable food that can be adapted locally through culturally-appropriate and locally-applicable food systems.

Guidelines should draw together the elements of a diet that is commonly considered important/essential, relatively simple advice that can be applied globally, including recommendations to increase consumption of vegetables and fruits, as well as plant-based proteins, and limit salt, sugar and trans-fat. Guidance around consumption of animal products (including dairy, meat, eggs and fish) is best applied regionally; while reduction in consumption is often recommended in Western-type diets, in some contexts consumption should increase in order to meet basic nutritional needs. When these are devolved to the country level, these should be adapted to the local food culture.^{18,19}

The guidelines should be data-driven, drawing on social and environmental science, big data from companies and populations, accessible and practical (e.g. identify effective theories of change and technologies for delivery).

The guidelines should include minimum reporting requirements on nutrient composition and environmental impact (e.g. CO₂, water use, land conversion) and nutritional content (e.g. protein, sodium, fat, sugar). To be effective, the guidelines must share the methodology that informs them freely to build legitimacy and public trust.

Maturity of ask: Further co-creation is required to consider the current frameworks in place and why they are not having the intended impact. During the Science to Policy Dialogues, many participants spoke of the need for a unifying goal, similar to the 1.5°C target for climate change, that sufficiently reflects the complexity and fragility of global food systems.

CODEX PLANETARIUS

Codex Planetarius is a concept that has been suggested by WWF to develop a set of minimum environmental requirements on all internationally traded food commodities, with an accompanying set of measurable global indicators to ensure that planetary health is prioritized. This approach could build upon the existing standards and guidelines that have been developed as part of the Codex Alimentarius, ensuring that planetary health and environmental concerns are considered at the forefront of the global food trade.



Regional and national policy recommendations:

- **Develop regional and/or national diet and rating guidelines while also raising the ambition of existing standards.** A clear set of coherent, regional or national standards can act as an important bridge between global guidelines and local context.²⁰ Standards are a key component of public health policy and should support consumers to make more informed choices on the products they eat (e.g. reflected within national food-based dietary guidelines (FBDGs) for healthy and sustainable diets). Research has

indicated that countries are taking significant steps to promote FBDGs but many are not sufficiently ambitious enough to achieve both health and environmental targets.^{21, 22} For FBDGs to have a greater impact on consumption patterns they must be supported by transparent methodology and reflect sociocultural factors, including differences of dietary patterns of social minority groups (e.g. indigenous peoples), rapidly changing dietary trends²³ and considerations of modern lifestyles, such as busy schedules and lack of cooking skills. Furthermore, as national and regional governments continue to

adopt new dietary standards, the need for developing and deploying metrics and benchmarks designed to measure and track progress grows. For this reason, a multi-stakeholder mechanism for monitoring and evaluating progress should be designed and implemented to accompany these dietary guidelines and ensure that they are carried out effectively.

Maturity of ask: National standards can be refined to better align with global guidelines once they have been agreed.

EXAMPLES OF FOOD BASED DIETARY GUIDELINES (FBDG) AND LABELLING

One example of an effective FBDG which integrates sustainability and health issues is Livsmedelsverket²⁴ in Sweden. In line with WHO guidance, Sweden's food guide focuses on key foods to eat more or less of using traffic light colors rather than a detailed description of a daily diet. The guide is used in conjunction with the Keyhole symbol, an initiative of the National Food Agency, which indicates when food products or meals (including supermarkets and restaurants) contain less fat, sugars and salt, and more fibre than similar products not carrying the label. The logo can be a simple way to help

busy consumers make better purchasing decisions, and encourages manufacturers to produce healthier products.

Another example of an approach to labelling, is Nutri-Score, first developed in France in 2017 and has since been piloted or adopted in other European countries, including Spain, the Netherlands and Belgium, and by some food brands, including Nestlé, PepsiCo and the Kellogg Company. The Nutri-Score is a nutrition label that converts the nutritional value of products into a code of five letters that takes into account nutrition that is recommended and those that should be avoided. The score is displayed on the packaging of participating

companies' products or can be found using the mobile application and scanning the barcode. Nutri-Score is currently under discussion at the European Commission which is analyzing a range of labelling approaches across the EU to select a mandatory approach. Discussions at a regional level have not been without controversy, as some national governments protest that labelling should be optional and it risks disadvantaging certain foods that are integral to their diets. In particular, the Italian government protested that olive oil and Parmigiano cheese would be designated 'red' under the scoring system.

- **Develop true cost accounting approaches to ensure the societal impact of food is reflected within pricing.** Businesses should use the guidelines recently released by the [Capitals Coalition](#)²⁵ to understand their impacts and dependencies on nature and society, to help build a business case for true value accounting. Furthermore, collaboration between different stakeholders (including government, NGOs and business) should be encouraged to advance true cost accounting approaches.

As further guidance is provided on how to undertake true cost accounting for the food and agriculture sector, policy should seek to incentivize business to embed these practices within internal processes. Carbon pricing is one policy option to incorporate the environmental value of food production, but must be carefully balanced with food security and is not appropriate in many developing countries.²⁶ It is critical that these approaches do not compromise affordability.

Maturity of ask: Current approaches towards True Cost Accounting are still in an early stage. Methods to evaluate the social and environmental cost of food need to be implemented within businesses to achieve alignment, before action on a larger scale can be achieved.

- **Reward companies for improving the nutritional content and environmental sustainability of their products.** By incentivizing positive business action, governments could unlock private investment at scale. Rewarding good practice can help to create additional demand for healthy food, while also helping businesses that work in positive nutrition to access additional sources of capital and resources.²⁷ Existing production-based subsidies for foods that have a negative impact on nutrition, social and environmental value could be repurposed towards more healthy and sustainable foods (e.g. fresh fruit or vegetables), or new incentives could be introduced to replace them.

Evidence has shown that lowering the costs of healthy foods increases their consumption, while increasing the costs of unhealthy foods decreases intake.²⁸ Possible incentives include business parks with lower rents and taxes, and cheaper electricity and water suppliers, or low interest loans for nutritious food suppliers.²⁹

Maturity of ask: Before policies to incentivize companies to improve the nutritional content and environmental sustainability of foods can be readily implemented, alignment on the dietary definitions and subsidy requirements need to be attained.



POLICY ASK 2: CREATE AN ENABLING ENVIRONMENT TO EDUCATE CONSUMERS ON HEALTHY AND SUSTAINABLE CHOICES, AND ENSURE RESPONSIBLE MARKETING PRACTICES AND ADVERTISING TO NORMALIZE CONSUMPTION OF A HEALTHY AND SUSTAINABLE DIET

THE CHALLENGE

Diets are closely linked to habits, incentives and norms, and targeted action is required to build consensus around new behaviors that encourage healthy and sustainable diets. However, there is currently a lack of transparent and clear information available for consumers to make informed dietary choices. There is not enough collaboration between private and public sectors to establish equitable regulation and policies that promote healthier and sustainable diets and create a level playing field. Especially protecting vulnerable groups (e.g. children) is essential.

POLICY RECOMMENDATIONS

Due to the context-specific nature of healthy and sustainable choices, and the maturity of the consumer-government relationships, policies to normalize and change behaviors should primarily be developed at the regional and national level but can be supported by shared global evidence.

Global policy recommendations

- **Build a publicly accessible global knowledge repository.** The global case for shifting diets to achieve health and environmental goals is well established, but the evidence base is spread across a wide number of sources, stored in a wide number of locations, and best practices from across the world are not easily accessed. As such, particularly in low- and middle-income countries, evidence is not sufficiently organized or available to allow policymakers to set policies.³⁰

CONSUMER CAPABILITY

Diets are not solely based on the choices that individuals make but are also determined by the structural conditions that influence the choices that are available to them.³⁶

Some argue that being in a lower social class or having few years in formal education is more dangerous to one's health than having high

cholesterol or exercising little. It is not, therefore, merely having access to the correct food and the purchasing power to buy them that must be considered but a wide range of personal heterogeneities, environmental diversities, variation in social climate, differences in relational perspectives, distribution within the family. Considerations of agency and security have further built on this theoretical

framework to inform a more holistic understanding of nutritional outcomes.

Capability and choice are closely linked, and policies should support both consumers' freedom to choose (through increasing their capabilities) and guide their ultimate choices towards healthier and sustainable options.

While there are some existing platforms that are working to foster greater collaboration and knowledge sharing (e.g. Nutrition Connect), there is a need for a universal, free-to-access database to share data, best practices and case studies. Businesses could use this data to expand into new markets or serve consumers with new products, and governments with lower capacity could find solutions which could be adapted to their context. A shared evidence base would also facilitate trade that enhances the supply of healthy and sustainable products, rather than introducing hidden protectionism.

Maturity of ask: At present, there is no universally recognized global knowledge repository for food systems transformation.

Regional/national policy recommendations:

- **Educate consumers on the importance of healthy and sustainable diets.** Use education through a variety of channels – including schools, canteens, medical centers – to raise awareness amongst consumers of the importance of making healthy and sustainable choices, as well as limiting food waste. Developing educational initiatives to demonstrate the value of healthy food choices and their benefits, with a particular focus on children to change the nutritional habits formed during early years is important.³¹ This could include campaigns to educate consumers on leftover management, sustainable food waste disposal, and to improve understanding of when food is safe to eat.

- Other campaigns to help enhance the understanding of healthy and sustainable food could include healthy nutrition campaigns in schools. Additionally, governments could leverage multimedia technologies, such as websites, social media platforms or smart phone applications, to attain wider consumer reach. For instance, there could even be nationally coordinated food champions programs that utilize interactive technologies for social outreach and increasing awareness on making healthy food choices

Maturity of ask: Campaigns to educate consumers are already in operation, similar campaigns that are redesigned to focus on the promotion of healthy and sustainable diets should be developed.

- **Use behavioral nudges.** Marketing does not need to rely on the conscious awareness of consumers to be effective and research has demonstrated that different nudge techniques, in particular behavioral nudges, can be effective at changing consumer decisions. For example, the introduction of nutrition labelling statistics has helped to reduce intake of calories by 6.6%, total fat by 10.6% and other unhealthy options by 13.0%, while increasing vegetable intake by 13.5%.³² Governments should engage closely with producers and retailers, using the latest insights from behavioral sciences to develop policies which encourage consumers to make more healthy and sustainable food decisions.

- These could involve incentivizing the smart labelling practices to provide consumers with more information, or to help create an environment for consumers to make healthier decisions, for example, through guidelines on the positioning and shelf placement of certain foods within retail stores.

Maturity of ask: Research has demonstrated the potential role of behavioral nudges in influencing consumer behavior. Policies can be readily adopted to implement these nudges.

- **Manage advertising and marketing regulations.** Policy measures that support the collaboration of the public and private sector towards responsible marketing practices and the promotion of the consumption of healthy and sustainable products should be encouraged. In addition, science-based policy measures that support marketing restrictions to protect vulnerable audiences should also be encouraged. Evidence exists which shows the adverse impact associated with advertising and marketing of food of low nutritional quality, particularly for children. Arguably policy measures to restrict advertising and marketing can lead to reduced intake of food of low nutritional quality and increased intake of healthy food overall.^{33,34} Governments should consider forming advisory boards and working groups to improve dialogue with the private sector to ensure that recommendations are feasible.

Maturity of ask: Restrictions on marketing and advertising practices are already in use for non-food products with negative impact on health, these restrictions could be replicated for food products.

- **Use enhanced transparency to support consumers to make more informed decisions.** Improving the transparency on the content and footprint associated with food products has an important role to play in improving consumer awareness, and helping consumers make better choices.

Measures to provide information to support consumer choice should be developed to enhance the visibility of supply chains. Previous research into the impact of labelling has shown that information provided on the health implications of a product reduces consumers' selection of foods that should be consumed in moderation.³⁵

Implementable measures could include the development of a traffic-light rating assessment system like the system developed by Sweden, to inform consumers of the sustainability and health profile of products, such as salt, calories, sugar and fat content.

Maturity of ask: Although evidence has demonstrated the potential role of transparency in influencing consumer choice, alignment is required around which indicators should be included on labels.



POLICY ASK 3: COMMIT TO EMBEDDING HEALTH AND SUSTAINABILITY REQUIREMENTS WITHIN PUBLIC PROCUREMENT

THE CHALLENGE

While governments have significant influence on the policy environment that governs businesses' operating environment, they also wield significant purchasing power that can create commercial incentives for businesses to respond to. Public procurement represents 12% of GDP in the OECD on average and up to 30% of GDP in developing countries.³⁷ Given the significance of this spending, public procurement has the potential to nudge markets towards higher sustainability and health standards and outcomes. However, current public procurement practices do not comprehensively align with the requirements to achieve sustainable and healthy diets and are missing the opportunity to create change at scale.

POLICY RECOMMENDATIONS

Given the localized nature of consumer preference and government guidelines, public procurement policies should be decided at the national, regional or local level.

Regional and national policy recommendations:

- **Develop public procurement requirements.** Introducing procurement requirements across the public sector (e.g. schools, hospitals, prisons, government departments) that are in line with the global guidelines and national standards creates reliable demand, at scale, healthy and sustainable food which businesses can respond to. For example, public procurement of alternative protein sources (e.g. plant-based proteins) could drive short term demand and catalyze private sector investment.³⁸ In 2019, the European Commission released their Green Public Procurement criteria for food, catering services and vending machines.³⁹ The criteria include requirements around sourcing of marine and aquaculture food products, animal welfare and fair ethical trade products.

Maturity of ask: Building on the initial guidance provided by the European Commission, public procurement requirements for healthy and sustainable food could be developed and introduced to other countries.

VEGETARIAN MEALS IN FRENCH SCHOOL CANTEENS

In 2018, the French Government passed the "Loi EGalim" which aimed to re-establish fairness between food producers and retailers. One component of the beleaguered bill is the aim to promote safe and healthy nutritional lifestyles through education. The EGalim law required school canteens to offer a vegetarian menu at least once a week and to remove plastic packaging. A study by Greenpeace France estimated that this would lead to a 14-19% reduction in greenhouse gases emitted to produce the food served in canteens.

⑤ Enabling actions to unlock and accelerate policies at scale



⑤ Enabling actions to unlock and accelerate policies at scale

To support the realization of the three policy asks, we have identified the following enablers that will be critical to the successful transformation of the food system.

COORDINATE POLICIES AND ACTIONS

A major barrier to food system transformation is the lack of coordination and joined up action between and within governments, academia, business and civil society. To support greater coordination, we recommend:

- **Greater cooperation between international and national institutions** to ensure alignment of objectives whilst allowing for local implementation. Regular meetings with multilateral institutions and national governments can support alignment at a high level. This is critical for long-term strategies, such as embedding global standards, and also acute issues such as ensuring continuation of access to markets (regional, national and international) and preserving trading channels and networks during production shocks to ensure continued food availability and limit price increases.

- **Within countries, support more integrated policymaking** through increased coordination amongst government departments, including the health, agriculture, environment, education, innovation, finance and trade departments. There has been increased recognition of the importance of integrated decision-making in food policy.⁴⁰ Currently, many government departments do not consider the impact of policy across other parts of the value chain, beyond their focus areas.⁴¹ For example, ministries of agriculture tend to not be incentivized to consider the impact of their policies on the health of consumers. However, there is growing recognition of how food policy is relevant to other departments, including health, environment, education and migration.⁴² Governments should hold annual meetings between all relevant ministries to agree on a national food systems strategy. Better understanding of system wide costs and benefits, including through true value accounting, can support government departments to develop holistic solutions.

- **Regular engagement between public and private sectors across the value chain** to share and identify barriers to food systems transformation and co-create solutions, while also each partner acts and implements actions with their respective expertise. Through closer alignment, businesses can better prepare for changes in the regulatory or operating environment.
- **Facilitate public-private and innovative cross-sector partnerships.** In particular governments can work with financial institutions to create financial instruments and products to de-risk private capital and encourage innovation, with conditionalities that incentivize positive health and environmental outcomes.

LEVERAGE DATA AND TECHNOLOGY TO INCREASE TRANSPARENCY

Lack of transparency across the whole value chain is another major barrier to developing evidence-based policies that achieve the intended impact. Better data that can be shared more freely will be a key input into the development of global standards and the national guidelines.

Technology offers an exciting opportunity to facilitate transparency and accountability in food systems through:

- **Big data on environmental and health impact.** Big data is large and diverse sets of information that organizations, governments and other institutions create through daily operations. Technology can help to make sense of these large mines of information and can facilitate sharing of anonymized data between companies, governments, and academia to inform policy development. Big data can also be used to create software to model scenarios, such as simulations for food supply chain redesign based on sustainability or food quality requirements. Recent data from business is a critical resource that can provide real-time feedback on the impact of policy changes and allow for course corrections, and complements longer-term research from academia.

- **Digital communications.** Where possible use digital innovation to support communication with customers, to influence decision-making and gather data on consumer preferences. One example of this is the [Good Fish Guide](#) application and website, developed by the Marine Conservation Society that provides consumers with up-to-date advice on fish to eat and fish to avoid.

- **Public investment in improved infrastructure** can bring out multiple benefits. For example, investment in key transportation and storage infrastructure, including roads, electricity, and water, can help to improve food security and increase access to areas with limited resources. Improved infrastructure can facilitate more efficient movement and transport of goods, helping communities in food deserts to access nutritious and affordable food. Better cold-chain or food processing facilities for perishable goods can reduce food losses, helping to increase the supply of healthy food to communities. Infrastructure is an important enabler to facilitate trade between countries, while improving access to affordable and nutritious food.

INVESTMENT IN IMPROVING INFRASTRUCTURE

Infrastructure has a critical role to play in improving accessibility to nutritious and affordable food, particularly in food deserts. Inadequate infrastructure leaves communities isolated without access to nutritious and affordable food, creating food deserts.

THE CHALLENGES OF INTRAGOVERNMENTAL POLICY DEVELOPMENT

The French Government launched the *États généraux de l'alimentation* (EGA) in 2017 with an ambitious mandate to address the issues in the food system in France and promote sustainable food. This meant ensuring the availability of food of a sufficient quantity and quality based on nutrition, taste and cultural values that is produced equitably and with respect for the environment. The delivery of this ambitious mandate exemplifies some of

the issues of multi-stakeholder coordination even within one country. Despite the EGA spanning the mandate of both the Ministry of Ecological Transition and the Ministry of Agriculture and Food, the latter had a subordinate role, only taking on responsibility in extremis. Ten other ministries were called upon, but participated in the exercise in a very uneven way. The EGA consultation was delivered through two systems: a public consultation via a dedicated website, and workshops for around fifty participants over two days. However, weak

public appetite to participate in the consultation meant that the workshops with a small number of participants carried greater weight. Despite the holistic mandate of the EGA the proposed solutions failed to present solutions across the value chain, instead focusing on the role of agriculture. Officials also struggled to bring together the views of disparate organizations in an equitable manner, neglecting the representation of small businesses, the scientific community and civil society in favor of large organizations and agribusinesses.

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