FOOD REFORM FOR SUSTAINABILITY AND HEALTH (FReSH)
SPOTLIGHT ON FReSH ACTION
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1. Foreword
Our shared ambition

Food has always played a vital role in society. The world is facing complex challenges associated with the global production, distribution and consumption of food. These include the eradication of both undernutrition and obesity, reducing food waste, minimizing environmental damage and ensuring long-term food security.

FReSH is a key project of the World Business Council for Sustainable Development (WBCSD), which emerged from our partnership with EAT. FReSH aims for food system transformation and industry change. We take a ‘fork to farm’ approach, starting with what people consume and focusing on the dietary and production shifts that are required for everyone to eat well within environmental limits. We then seek to enable the development and implementation of transformative business solutions that are aligned to science-based targets.

Over the last year, we have held powerful multi-sector science-led dialogues on food system challenges and business opportunities, including the plan for protein, increasing the nutrient content of packaged food, and how to bring the consumer along.

We believe that with the engagement of such a visionary and unique group of businesses, the food industry can help accelerate transformation to reach our shared ambition to provide healthy, enjoyable diets for all, produced responsibly, within planetary boundaries by 2030.

Alison Cairns
Director, FReSH, WBCSD
2. The food landscape requires change
The current system is outstripping the planet’s resources and we are not feeding ourselves in a healthy way.

- **815M** people, most of them farming families, **suffer from hunger**.
- **2B** people are **deficient** in critical micronutrients.
- **2B** adults are **overweight**, of whom **600M** are **obese**.
- **1/3** of food produced is **lost or wasted** between farm and plate, with the total **loss valued** around **USD $1.2T**.
- **25%** of global land is **highly degraded** and **80%** of terrestrial **biodiversity loss** is related to food systems.
- The world’s population is projected to reach **9.8B** people by **2050**, with billions moving to **resource-intensive diets**.
- Only **3 crops** account for more than **50%** of **plant-based calories** for humans.
- Greenhouse gas emissions (GHG) from agriculture, forestry and fisheries could **increase by 30%** until **2050**.
- **1/3** of food produced is **lost or wasted** between farm and plate, with the total **loss valued** around **USD $1.2T**.

3. Food as a key industry to reach the SDG targets

Private business – ranging from smallholder farmers to large companies – provide nearly all the food we eat. Given its impact and reach, the global food sector is at the heart of the transformation required to achieve the Sustainable Development Goals (SDGs). By contributing to the SDGs, food and agriculture players can realize at least 14 business opportunities with significant value creation.
### Food and agriculture: business solutions central to achieving the SDGs

<table>
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<th>Business opportunities in the food system</th>
<th>Value of incremental opportunities by 2030 (USD $ B)(^1)</th>
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<td>Reducing food waste in value chain</td>
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<td>Low-income food markets</td>
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<td>20-40</td>
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\(^1\) In 2015 values. Low and high scenario illustrated.
4. There is a clear business case for action
Companies active along the food value chain benefit from risk mitigation and can realize new business opportunities.

- **5% gross margin advantage and 10% higher valuation** for top ESG* performers
- **14x return on investment** for median food system players’ measures to reduce food loss & waste
- **Energized workforce** as contributions to society enhance employer branding and help attract and retain talent
- **Increased consumer demand and product price premium** as healthy and environmentally sensitive products show superior margins and growth rates
- **More resilient and cost-effective food supply chains** through reduced interruptions of raw material flows, increased supplier productivity and efficiency as well as minimized water, utility, and packaging costs


*Note: ESG = environmental, social and governance

2 Based on regression of ESG performance of consumer packaged goods companies on valuation and margins.
5. **Science defines the “2°C ” target for food**

FReSH’s key partner, EAT, is setting the scientific basis for healthy and sustainable diets.

**The challenge**
We still lack scientific consensus on what constitutes healthy and sustainable diets. This lack of consensus and specific scientific targets for achieving healthy diets and sustainable food production has hindered large-scale and coordinated efforts to transform the global food system.

**The results**
The EAT-Lancet report on Food, Planet, Health will spell out the global scientific targets for healthy diets and sustainable food production. These targets include the specific components of healthy diets and total global amount of land use, biodiversity loss, water use, GHG emissions, nitrogen and phosphorus boundaries for food production. In addition, the report will outline the food production practices and policies that will allow us to deliver healthy diets to everyone on the planet. The EAT-Lancet Commission will release its academic research in a comprehensive publication that is scheduled to be launched in January 2019.

**What is the EAT-Lancet Commission**
The EAT-Lancet Commission, composed of global experts in health, nutrition and sustainability, is a state-of-the-art scientific assessment that answers the basic question: What is a healthy and sustainable diet? The answer to this question and how it can be achieved for 10 billion people is central to achieving the SDGs and the Paris Climate Agreement.

**Science’s key messages**
Human health and environmental sustainability are prerequisites for social and economic development; a transformation of the global food system is essential to achieving the SDGs and the Paris Climate Agreement. This transformation will require radical shifts in current dietary trends and food production practices. It is absolutely possible and delivering healthy and sustainable diets to everyone on the planet is within our reach.

**Healthy and sustainable diets for all will not be achieved without a shared commitment by all sectors and individuals working toward achieving this goal.** This shared commitment lies at the heart of SDG17, which states that “A successful sustainable development agenda requires partnerships between governments, the private sector and civil society. These inclusive partnerships built upon principles and values, a shared vision, and shared goals that place people and the planet at the centre, are needed at the global, regional, national and local level.”
6. **FReSH translates science into action**

FReSH is creating business solutions across the value chain.

**Translating Science for business**
We are guided by science-based targets. FReSH’s transformative work with member companies is informed by several Science to Solutions Dialogues and science webinars with EAT to help business navigate the emerging science and consequential change.

**Creating the business solutions**
We combine full expertise across the value chain to create actionable, implementable, scalable business solutions. We are developing project pilots to support member companies in jointly testing business solutions on the ground that deliver on our shared ambition.

**Working with partners to lead industry change**
We will accelerate the achievement of our four Transformational Goals by collaborating across the value chain and with relevant stakeholders from academia, science, civil society and governments – as well as other WBCSD programs.
7. FReSH takes a systemic approach
FReSH’s innovative ‘fork to farm’ approach means starting with what people consume, focusing on the science-based shifts in diets that are needed. We then work back through the food system to determine what we need to grow, where and how, as well as how to process and distribute food in order to achieve our nutrition and sustainability ambitions – both globally and locally.

We need an integrated view across the entire food system to drive industry change and simultaneously address underlying challenges. No organization can achieve this alone: successful transformation requires collective action.
8. Member companies are taking action
Member companies are taking action across four Transformational Goals to achieve healthy, enjoyable diets for all, produced responsibly, within planetary boundaries by 2030.

A five-fold approach to achieve our shared ambition

- **Science-based, pre-competitive business-driven solutions**
  We are guided by science and data-supported evidence to scope out the solutions where businesses, working together pre-competitively, can have the most impact.

- **Systemic view**
  We need to adopt a holistic view of the food system in order to drive real industry change and simultaneously address underlying challenges.

- **Fork to farm**
  We start with what people consume, focusing on the science-based shifts in diets that are needed and work back through the food system.

- **Performance measurement & reporting**
  We need to set clear metrics and measurement in order to ensure that we are making an impact where it counts.

- **Global, regional & local**
  We need to respond to what is right for the market. Food systems are global, regional and local. And strongly shaped by cultural needs and norms.
Transformational Goal: Dietary Shifts

Dietary shifts are required to close the gap between nutritional guidelines and people’s intakes while remaining within planetary boundaries. Dietary shifts are a key lever to positively impact the whole value chain, linking health and nutrition to sustainable production and land-use management.

What FReSH does

We work to increase the diversity, healthiness and sustainability (production and consumption) of fruit, vegetables, nuts and grains

We strive to optimize protein consumption and production for nutritionally-healthy and environmentally-sustainable diets

We work to optimize the overall nutritional quality of packaged food

What will come out of it

Business solutions to lead people towards increased intake of fruit and vegetables

A common message on sustainable and healthy protein production and consumption

Business solutions to change sources of protein intake

Nutrition Charter and Roadmap

Business solutions to improve nutritional aspects of specific products

How you can use it

Remain at the forefront about industry and consumer trends as they arise and adapt product portfolios strategically

Learn from pilot projects on the ground to improve future interventions to lead people towards healthy and sustainable food

Participate in the design and transformation of markets so that healthier and more sustainable products can compete successfully in the future
Transformational Goal: Food Loss and Waste

Food loss and waste (FLW) amounts to a third of food produced for human consumption, but not all FLW is equally valuable from a nutrition and environmental standpoint - losses in terms of economic impact vary.

What FReSH does

FReSH is shifting the focus of the narrative from volume to value. We are working towards the most impactful steps to reduce food loss and waste along the entire value chain.

What will come out of it

We have developed a FLW calculator to enable companies to calculate the value of food loss and waste and avoidance in terms of nutrition and environmental impacts.

How you can use it

Apply the calculator to prioritize the most effective FLW actions across the value chain in order to achieve SDG 12.3.*

*Note: SDG Target 12.3: By 2030, halve per capita global food waste at the retail and consumer levels and reduce food losses along production and supply chains, including post-harvest losses.
Transformational Goal: Nutrition Secure Supply Chains

Nutrition Secure Supply Chains tackles the challenge of food insecurity and malnutrition among smallholder farmers, laborers and other vulnerable communities working in the food system.

What FReSH does
FReSH is enabling a broad coalition of companies and other stakeholders to drive nutrition security from production to point of sale. We are working to ensure that everybody in the food system has access to adequately nutrient-rich and healthy diets.

What will come out of it
We aim to develop a Nutrition Action Hub to connect people across geographies, enabling them to share data and best practices. We will also facilitate the set-up of an implementation network in different regions.

How you can use it
Connect and enable cohesive action in your supply chain.
Improve project planning and benefit from easier access to relevant stakeholders across geographies.
Transformational Goal: True Cost of Food

True Cost of Food brings the impact of positive and negative externalities – such as environmental and health benefits and costs – into business decision-making.

<table>
<thead>
<tr>
<th>What FReSH does</th>
<th>What will come out of it</th>
<th>How you can use it</th>
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<tr>
<td>FReSH is helping to drive systemic change by shifting how food and agriculture companies value social, human and natural capital. FReSH serves as the food system platform to connect business, markets, investment and policy decision-making.</td>
<td>We will develop a set of recommendations, including which tools and methodologies are best applicable to business and how companies can use them. We will also develop true cost implementation training and support for companies.</td>
<td>Incorporate the true cost of food for better decision-making and to guide future investments in the food system.</td>
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9. **Get involved with FReSH**

Strong engagement and collaboration from members across the value chain drives the food system transformation.
Acknowledgements

About FReSH

FReSH is one of the key projects of WBCSD’s effort to drive the transformation of the food system and to create a set of business solutions for industry change.

We take a ‘fork to farm’ approach, starting with what people consume and focusing on the dietary and production shifts that are required, to develop, implement and scale transformative business solutions that are aligned with science-based targets. FReSH emerged from the WBCSD and EAT Partnership.

Contributor

This report has been developed in collaboration with The Boston Consulting Group.

About the World Business Council for Sustainable Development (WBCSD)

WBCSD is a global, CEO-led organization of over 200 leading businesses working together to accelerate the transition to a sustainable world. We help make our member companies more successful and sustainable by focusing on the maximum positive impact for shareholders, the environment and societies.

Our member companies come from all business sectors and all major economies, representing combined revenues of more than USD $8.5 trillion and 19 million employees. Our global network of almost 70 national business councils gives our members unparalleled reach across the globe. WBCSD is uniquely positioned to work with member companies along and across value chains to deliver impactful business solutions to the most challenging sustainability issues.

Together, we are the leading voice of business for sustainability: united by our vision of a world where more than 9 billion people are all living well and within the boundaries of our planet, by 2050.

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