



Food Value Chain Consultations

Consultative workshop on sustainable food value chain with focus on food services and tourism sector
8th April 2021

WORKSHOP REPORT

Attendees:

Full list of attendees is available in the end of the report

Workshop objectives:

- Introduce the value-chain approach as adopted by the One Planet-International Resources Panel Task Group.
- Provide key findings of the analysis of the food value chain with the focus on food services & tourism.
- Understand what initiatives/solutions currently exist at the food services stage of the food value chain to:
 - define the opportunities for their scale-up and replication;
 - identify gaps and challenges to be addressed;
 - identify messages that tourism sector would like to address to stakeholders involved in food value chain at production, distribution and waste management stages to improve resource efficiency of food operations at service stage.
- Contribute to the development of the Global Roadmap of Food Waste and Loss in the Tourism sector by recommending systemic solutions that address more broadly resource efficiency of food operations.

Full presentation of the meeting is available [here](#)

MAIN MESSAGES

- The application of the 'Value-Chain Approach' to analyse the food sector showed that the middle stages of the food value chain -- controlled by food companies across processing and packaging, retail and food services -- are structurally powerful and have a disproportionate influence across both primary production and final consumption. Actors at these stages have a huge impact on the activities at either end in determining both what food farmers sell and what food consumers buy.
- Main entry points from the perspective of the tourism sector to improve resource efficiency of the food value chain, especially at the Food Services stage are: 1) Food sourcing and procurement; 2) Food preparation 3) Prevention and reduction of food loss and waste 4) Influence of tourism consumption patterns
- By leveraging these entry points, tourism sector stakeholders can influence and support actors of other stages of the food value chain in the following ways:



- ✓ **Producers:**
 - Establish coordination with producers on destination level
 - Support empowerment and training of local producers
 - Support diversification of local produce by generating demand
 - Contribute to diversification of buyers and suppliers in support of the value chain sustainability
 - Apply fair approach to local farming by giving an opportunity to market access for all and explore burden sharing that is associated with sustainable farming (*e.g.: costs of certification; access to training and adopting new technologies*).
 - ✓ **Consumers and local communities:**
 - Enable food redistribution towards local communities (circularity)
 - Offer sustainable menus and adopt resource efficient food preparation practices
 - Promote awareness raising messages on sustainable consumption and production of food adapted to different audiences
 - ✓ **Policy makers and companies:**
 - Support availability and digitalization of data on food loss and waste, that is essential for decision making
 - Address food loss and waste through circular economy principles
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SETTING THE SCENE

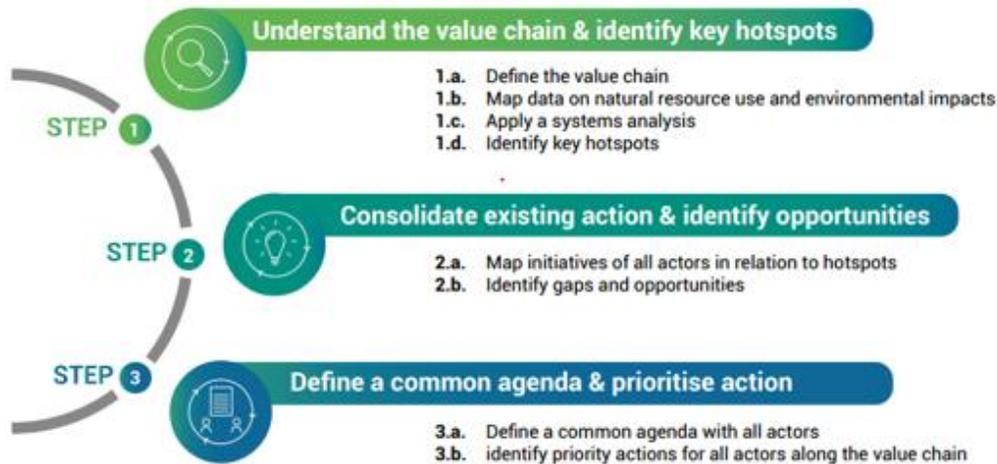
- Strengthening the science-policy interface by adopting the value-chain approach is one of the key elements in strengthening multilateral cooperation on Sustainable Consumption and Production (SCP).
- As part of this process, the One Planet network has planned a series of multi-stakeholder consultations to take place in 2021, focused on high-impact sectors of food, construction and plastics.
- These consultations build on the findings of [the One Planet-International Resources Panel Task Group](#) on catalysing science-policy action on SCP, presented in this [report](#) “Catalysing Science-Based Policy Action on Sustainable Consumption and Production: The Value-Chain Approach and its Application to Food, Construction and Textiles”.
- This is the first consultations series that is focusing on the food sector and dedicated to “Innovative business and policy solutions” along the food value chain. It consists of 5 workshops focusing on the prioritized stages of the food value chain.
- The outcome document of these workshops developed jointly with the participants will be the basis for the collaborative development of the common agenda for action in the food sector.
- This is the first workshop of the series dedicated to Food Service and Tourism. Full information on the food value chain consultations can be found [here](#)
- [United Nations Food Systems Summit 2021 is an essential milestone in defining the global food systems agenda to achieve Agenda 2030. The outcomes of this series of consultations and subsequent collaborative work on defining the common agenda will be aligned with the on-going work leading up to the Summit.](#)



- [This will be done through the coordination of efforts with the UN Food Systems Summit Secretariat hosted by UNEP, as well as engaging in the submission of game-changing solutions collected by the Action Tracks established by the Summit.](#)
- [Participants to the food value chain consultative workshops that are also involved in various activities leading up to the Summit are invited to make the linkages between the two process to assure the alignment of the outcomes.](#)
- The work on the value chain approach in high-impact sectors will inform further discussions on a post-2022 strategy on sustainable consumption and production lead by the Member States. More specifically, it should be considered that the work on the food value chain in these discussions should support the implementation of the outcomes of the UN Food Systems Summit.

VALUE-CHAIN APPROACH AND ITS APPLICATION TO THE FOOD SECTOR

- The One Planet-International Resources Panel Task Group on catalysing science-policy action on SCP has been established at [the request the Member States at the 4th United Nations Environment Assembly](#)
- The [Task Group](#) aimed to catalyse science-based policy action on SCP, thereby providing actionable insights on the management of natural resources in relation to the 2030 Agenda for Sustainable Development. To achieve this, the task group took a sectoral focus and applied the ‘Value-Chain Approach’.
- The [‘Value-Chain Approach’](#), as developed by the Task Group, is a methodology for catalysing science-based policy action on sustainable consumption and production which identifies key points of intervention within economic systems to reduce natural-resource use and environmental impacts through a common agenda for action.
- By applying a systems lens, the socio-economic drivers and barriers that influence value chain operations of different sectors are identified, taking into account the complex feedback loops influencing the operations and behaviours of actors along the value chain. This approach shows that the key points of intervention are often not the same as where natural resource use and environmental impacts take place, making systems analysis essential.
- The ‘Value-Chain Approach’ identifies where the greatest opportunities for a shift to sustainable consumption and production exist, shapes corresponding actions by building on current knowledge and available data and engages the relevant actors.
- The Approach consists of three main steps:



- The Task Group has applied various steps of the ‘Value-Chain Approach’ to three high-impact sectors: food, construction and textiles.
- When it comes to the sector of food, application of Step 1 has demonstrated that¹: *“while the majority of natural resource use is taking place at the primary production stage, a systems lens that considers drivers of food systems shows us that primary producers have a limited ability to shape food systems and change their production practices. Analysis shows that the middle of the value chain, controlled by food companies across processing and packaging, retail and food services, is structurally powerful and has a disproportionate influence across both primary production and final consumption. While these stages of the value chain don’t use the most resources themselves, they have a huge impact on the activities at either end in determining both what food farmers sell and what food consumers buy”*.
- The analysis of the food value chain identified three core challenges:
 - 1) How we produce food: The majority of natural-resource use and environmental impacts takes place during production. Changing production practices is critical to using resources more efficiently and sustainably, while causing less damage to the environment.
 - 2) How much food we produce and consume: One-third of all food produced is either lost at the production, transportation or processing stages, or wasted downstream in the food at the retail, food service and consumption stages.
 - 3) What types of food we produce and consume: Different types of food can embody large differences in the natural resources used and environmental impacts caused along the stages of the value chain including production processing, transportation, and disposal.
- Initial application of Step 2 of the Approach was based on the reporting data of the One Planet network. The One Planet network activities related to food were mapped in relation to the stage of the value chain that they target. Most activities of the Network take place at primary production (23%) or individual consumption (19%) stages. The middle stages of the food value chain, including food processing and packaging, transport and logistics, retail and food service, represent only 25%

¹ Full analysis available [here](#)



of the total. A significant amount of these activities within this ‘middle part’ of the food value chain can be seen at the food service stage. This is driven by a large number of activities under the Sustainable Tourism programme to address food sustainability.

- This consultation series on “Innovative Business and Policy Solutions” organized by the One Planet network continues the application of the ‘Value-Chain Approach’ developed by the Task Group. Understanding of the existing action along the food value chain will be broadened through the consultations and mapping of initiatives along the food value chain will be enriched to better reflect the existing global action and identify opportunities, gaps, challenges, interlinkages and trade-offs.
- This analysis will serve as the basis for the collaborative development of the common agenda for action for the food sector (Step 3 of the ‘Value-Chain Approach’).

Sustainable Tourism Programme at the Food Services Stage

- Tourism companies can have strong influence on natural resource use and environmental impacts along value chains through:
 - Choice of food products sources and served to guests
 - Ways in which food is served and managed
- Many activities at this level see tourism companies choosing to:
 - Procure food locally and seasonally
 - Apply standards, labels and criteria on food procurement
 - Undertaking steps to address food loss and waste
- Most activities of the programme are focused on “how much food we produce and consume” (*e.g.: smaller plate sizes or guest awareness activities to reduce food waste*) and “what type of food we produce and consume” (*e.g.: sustainable menus and offering plant-based menu items*)
- Activities that address the food service stage are led both by major global hotel chains, as well as by small-scale individual tourism providers

Food service stage of the value chain

- Additional analysis of the middle stages of the food value chain, has concluded the following with regards to the Food Service stage:
 - There is a lack of publicly available information about the food service stage.
 - Private companies not listed on the stock exchange or required to publish financial statements
 - Difficult to estimate overall value of sector and evaluate key players
 - The food service stage is relatively unconsolidated: in developing and emerging economies main actors are small, independent outlets and street vendors
 - The largest food service actors in the world are Sysco, Compass Group plc and Sodexo:
 - Provide meals for hotels, hospitals, prisons, schools, venues
 - Provide pre-prepared ingredients and meals to other, consumer facing actors in the food value service
 - Other “household name” restaurant chains, such as Starbucks, McDonalds and Chipotle are big players but have small relative market share. Revenues of large brands such as McDonald’s account for less than 1% of the global food service market value

TOURISM SECTOR ACTION AT FOOD SERVICES STAGE OF THE FOOD VALUE CHAIN



The discussions of the workshop focused on existing initiatives/solutions of the tourism sector and have identified a number of enablers, challenges & gaps that exist at the food service stage of the food value chain, as well as its interlinkages with other stages, mainly that of primary production, individual consumption, as well as with policy environment.

Opportunities & enablers

- Establishing linkages between local producers and actors of the tourism sector provides multiple benefits. It gives market access for local farmers and the opportunity to diversify their production; and, on the other hand, allows the actors of the tourism sector to offer fresh, nutritious meals to their customers made from local products.
- Sustainable procurement practices play an important role in establishing this link and maximizing local sourcing practices. These practices should not be applied in a way that disadvantages some farmers over others.
- Training of procurers as well as kitchen staff is essential in this process as it allows to minimize waste and maximize the value of the food served.
- A greater opportunity exists when tourism sector actors not only purchase their products from local farmers, but establish long-term relationship with them, contributing to their training, logistics, access to innovation and technology related to such practices as agro-ecology, agro-biodiversity, avoidance of heavy pesticides and fertilizers and overall positively influencing the resource use and environmental impacts of the primary production and help diversify the offer.
- Developing sustainable menus adapted to local requirements and training of kitchen staff on topics related to food waste, resource efficiency, sustainable diets, etc. undertaken in parallel with consumer awareness activities contributes to building the demand for such meals and improve the sustainability of food preparation.
- Farm tourism is another opportunity to assure additional revenue for producers, as well as being an educational and awareness raising approach.
- Repurposing surplus food has multiple simultaneous benefits: it helps to avoid food waste and supports local communities by redistributing good and nutritious food to those in need (link to circularity in the food sector)
- Linking the issue of addressing food loss and waste as a way to reduce carbon footprint and improve cost efficiency is an important enabler for this topic to be addressed by the tourism sector more broadly.
- Digitalization of data on food loss and waste, its monitoring and accessibility to actors of the tourism sector, including chefs and policy makers is a crucial element in defining action to tackle the issue.
- Making the economic case to tackle food loss and waste which results in positive return on investment is another opportunity to address it.

Challenges & Gaps

- The burden of bearing the costs associated with sustainable production often fall on farmers, putting them in disadvantaged position. Adopting sustainable farming practices and being able to farm diverse local varieties of food should be economically viable for farmers for this to become common practice.
- Prevention and reduction of food loss and waste remains a challenge for the tourism sector.



- One Planet Sustainable Tourism Programme, through its Advisory Group on Food Loss and Waste in Tourism sector, has identified the following gaps:
 - Absence of sectoral baseline on food waste and loss
 - Absence/lack of strategic vision on company level with milestones that could be transposed into actions plans locally
 - Lack of continuity in measurement of waste and lack of consistent annual reporting on progress
 - Punctual and non-recurring character of activities aiming at reducing food waste and absence of consistent follow up
 - Levers to address food waste and loss are not identified in comprehensive and systemic manner (lack of value chain and circular approaches, solutions such as sustainable procurement not always clearly identified and prioritized)
- Based on the gaps identified the Programme aims to develop the Roadmap on food loss and waste in tourism by:
 - Setting a common vision for the tourism sector to address food waste and loss
 - Providing/recommending measurement and monitoring methodology to establish a baseline for the sector and monitor progress globally and per company/organisation/destination on an annual basis
 - Setting targets and yearly milestones by 2030 for the tourism sector to reach SDG 12.3
 - Providing governments with recommendations on policies to effectively address food waste and loss in the tourism sector
 - Providing tourism companies with recommendation for tools, methodologies and best practices including around procurement and sustainable diets

LIST OF INITIATIVES SHARED AT THE WORKSHOP

- ["Virtual Agricultural Clearing House"](#) by Saint Lucia Hospitality & Tourism Association
- ["Reinforcing local supply value-chains of fresh products"](#) by Club Med & Agrisud
- ["Sustainable Food Manual"](#) by Futouris
- ["Sustainable Food: Guest Communication"](#) by Futouris
- ["Ecological Blue Flag"](#) by Ministry of Agriculture and Livestock, Costa Rica
- ["Sustainable tourism certification"](#) by Costa Rican Institute of Tourism
- ["Young Chef Award" of World Regions of Gastronomy](#) by International Institute of Gastronomy, Culture, Arts and Tourism
- ["Zero Food Waste"](#) by Scholars of Sustenance Foundation
- [Circular Economy Strategy 2030](#) by Government of Spain (includes reduction of food loss and waste as one of the targets)
- [A Toolkit for Communicating Food Waste to Hotel and Cruise Guests](#) with [case studies](#) by WWF USA
- [16 Case Studies: Leveraging Sustainable Procurement to Transform Tourism](#)
- [Climate policy roadmaps and action plans for tourism](#) by UNEP
- [Low Harm Hedonism Initiative](#), University of Queensland, Australia
- The Champions 12.3 reports by World Resources Institute
 - [Link](#) to report for hotels
 - [Link](#) to report for restaurants
 - [Link](#) to report for service sector



LIST OF ATTENDEES

	Organisation	Expert's name
1	Asian Ecotourism Network	Masaru Takayama
2	Club Med	Robin Bouffart-Gout
3	Consumer Goods Council	Sibuela Ngeniswa
4	Costa	Luisa Gulluni
5	Costa	Davide Triacca
6	Croatia - Ministry of Tourism	Adriana Relja
7	Disney Paris	Simone Targetti Ferri
8	Funde Cooperación	Marianella Feoli
9	Futouris	Tatjana Peters
10	Global Sustainable Tourism Council	Roi Ariel
11	Green Evénements	Béatrice Eastham
12	Greenview	Eric Ricaurte
13	Institut national de la recherche pour l'agriculture, l'alimentation et l'environnement- INRAE	Dr. Allison Marie Loconto
14	International Institute of Gastronomy, Culture, Arts and Tourism	Diane Dodd
15	IHG Hotels and Resorts	Louise Holder
16	Ministry of Agriculture and Livestock (Costa Rica)	Roberto Azoifeifa
17	Pacific Asia Travel Association	Napason Wetchapram
18	Pacific Asia Travel Association (PATA)	Fernanda Rodat
19	Scholars of Sustenance	James Leyson



20	SLHTA	Carl Hunter
21	Sustainable First	Mafalda Borea
22	Sustainable Food Systems Programme	Patrick Mink
23	Sustainable Global Resources	Mervyn Jones
24	Sustainable Hospitality Alliance	Claire Whitely
25	Sustainable Hospitality Alliance	Madhu Rajesh
26	Sustainable Hospitality Alliance	Sven Wiltink
27	Sustainable Travel International	Paloma Zapata
28	Sweden Environment Agency	Andrea Norgren
29	TUI	Andreas Vermohlen
30	United Nations Environment Programme	Mateo Ledesma
31	United Nations Environment Programme	Helena Rey De Assis
32	UNFCCC	Angela Wagner
33	Winnow	David Jackson
34	World Resources Institute	Liz Goodwin
35	World Tourism Organisation (UNWTO)	Roxana Ashtari
36	World Tourism Organisation (UNWTO)	Dirk Glaesser
37	World Tourism Organisation (UNWTO)	Virginia Fernández Trapa
38	WWF Brazil	Virgínia Antonioli
39	WWF Colombia	Felipe Barney Arango
40	WWF USA	Monica McBride
41	WWF USA	Samantha Kenny
42	WWF USA	Pete Pearson
43	10YFP Secretariat	Branislav Mizenko
44	10YFP Secretariat	Yulia Rubleva
45	10YFP Secretariat	Svitlana Mikhalyeva



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46	10YFP Secretariat	Samantha Webb
47	10YFP Secretariat	Gina Torregroza
48	10YFP Secretariat	Fabienne Pierre
49	10YFP Secretariat	Lucia Castuera